

Bronze Sponsor



Data Visibility and Access Controls in Apptio

Your Guides:
Eric Chan and Rob DeLeo

Part I: Introduction



Introductions

- Take 5 Minutes
- Turn to a Person Near You
- Introduce Yourself
- Business Cards

Agenda

- Standard Roles vs Custom Roles
- Application Permissioning
- Report Permissioning
- Report Collection Permissioning
- Report Component Permissioning
- Row level security
- ITP Cost Object Permissioning
- ITP Tab Permissioning

Discussion

- Does anyone have a current Access or Security concerns around Apptio in your Organization?



Standard Roles vs Custom Roles

- Standard Roles
 - Out of box set by Apptio.
 - Unable to edit the permissions of Standard Roles.

Roles
Manage and explore roles & permissions

Explore by Environment **Standard Roles** Permissions

Search across Roles Add Standard Role

Role Name	External	Grantable By	Description	Details	Role Application Types
AIS BM	Yes		Provides access to Benchmark Explorer	Details	AIS
Admin	Yes		Applies to Cost Transparency, Datalink, Interactive Benchmarking, IT Planning, TBM Studio and Cloud Cost Optimization. Can perform all available actions in the applications. There are no restrictions.	Details	Frontdoor
Analyst	Yes		Can view reports and create personal reports.	Details	Flagship
Apptio Partner	Yes		Apptio Partners have the same capabilities as Admins. In addition, Admins can manage users of external customers which they have the role in	Details	Frontdoor
BasicAgileUser	Yes		Basic Agile User	Details	Vanguard Show +1 more
Budget Process Owner	Yes		Can create, open, review, and close plans.	Details	SSA Show +1 more
Budgeting Process Owner	Yes		Used with the original IT Planning application, not IT Planning Foundation. Can configure the application and track and approve budgets as they pass through the budgeting process.	Details	FiscalCalendar Show +6 more
Business Consumer	Yes		A special case of Business User that has access to Bill of IT Business User reports	Details	Flagship
Business Owner	Yes		Can manage the workflow in the Bill of IT application.	Details	Flagship Show +1 more
Business Unit Owner	Yes		Used with the original IT Planning application, not IT Planning Foundation. Can specify	Details	Flagship

Page Size: 100 1 to 79 of 79 Page 1 of 1

Standard Roles vs Custom Roles (cont.)

- Create Custom Roles
 - Clone an Out of Box roles for a starting point and edit the permissions.
 - These roles can be used for visibility settings.

Roles

Manage and explore roles & permissions

Explore by Environment Standard Roles Permissions

Customer
regoconsultin...

Environment:
sandbox



Add Custom Role



Role	Type	Description	Application Types
AIS BM	Standard	Provides access to Benchmark Explorer	Cost Transparency
Admin	Standard	Applies to Cost Transparency, Datalink, Interactive Benchmarking, IT Planning, TBM Studio and Cloud Cost Optimization. Can perform all available actions in the applications. There are no restrictions.	Cost Transparency
Analyst	Standard	Can view reports and create personal reports.	Cost Transparency
Apptio Partner	Standard	Apptio Partners have the same capabilities as Admins. In addition, Admins can manage users of external customers which they have the role in	Cost Transparency

< Standard Role



Admin

Properties Permissions

Clone
Grant Access

General Properties

Role Type
Standard

Role Description
Applies to Cost Transparency, Datalink, Interactive Benchmarking, IT Planning, TBM Studio and Cloud Cost Optimization. Can perform all available actions in the applications. There are no restrictions.

Role Application Types
Frontdoor

Grantable by Roles

Discussion

- Has anyone created custom roles for their organization? If so, what for?



Application Permissioning

- Frontdoor – Applications
 - Control what shows on the Homepage with Visibility by role.

The screenshot displays the 'Environment' management interface for 'regoconsultingpartner.com:sandbox'. The interface includes a sidebar with 'Home', 'Users', and 'Environments' sections. The main content area shows a table of environments with the following data:

	External Name	Visible To	URL	Group Name
<input type="checkbox"/>	Finkler - Practice	Nobody	https://partners-na-sandbox.apptio.com#regoconsultingpartner.com:Finkler++Practice	Default
<input type="checkbox"/>	Finkler Playground	Visible for any user with permis...	https://partners-na-sandbox.apptio.com#regoconsultingpartner.com:Finkler+Playground	Default
<input type="checkbox"/>	Finkler SESIR	Nobody	https://partners-na-sandbox.apptio.com#regoconsultingpartner.com:Finkler+Playground	Default
<input type="checkbox"/>	Fiscal Year Test	Nobody	https://partners-na-sandbox.apptio.com#regoconsultingpartner.com:Fiscal+Year+Test	Unused Projects
<input type="checkbox"/>	Hamburger TCO_Potts	Nobody	https://partners-na-sandbox.apptio.com#regoconsultingpartner.com:Hamburger+TCO_Potts	Default
<input type="checkbox"/>	HP Practice	Nobody	https://partners-na-sandbox.apptio.com#regoconsultingpartner.com:HP+Practice	Default
<input type="checkbox"/>	Infrastructure Insights	Visible for any user with permis...	https://partners-na-sandbox.apptio.com#app:regoconsultingpartner.com:Cost+Transparency/Infrastructure+Insights	Default
<input type="checkbox"/>	Infrastructure Insights (Bill of IT ...)	Visible for any user with permis...	https://partners-na-sandbox.apptio.com#app:regoconsultingpartner.com:Bill+of+IT+Rego+Demo/Infrastructure+Insights	Default

ITP Cost Object Permissions

- Visibility is set in the Cost Object Permissions
 - User can be added at Multiple Levels
 - Cost Object Permissions is a "Live" table and updates are effective immediately

The screenshot shows the APPTIO interface for managing Cost Object Permissions. The left sidebar contains the navigation menu, with 'Cost Object Permissions' highlighted. The main content area displays a table of permissions for various cost objects. The table has the following columns: Cost Object, Owner(s), Editor(s), View Only, Can View Sensitive Columns, and Can View Sensitive Financials. The table is organized into a hierarchy of departments and cost objects.

Cost Object	Owner(s)	Editor(s)	View Only	Can View Sensitive Columns	Can View Sensitive Financials
▼ All Departments					
▼ APPS - App Dev & Support	doug.greer	audrey.mitch		audrey.mitch, doug.greer	audrey.mitch, doug.greer
CC-200 - Apps - Back Office					
CC-210 - Apps - Line of Business			mnealey	mnealey	mnealey
CC-220 - Apps - Sales & Ops					
► EUS - End User Services					
► I&O - Infra & Ops					
CC-390 - Office of the CIO					
CC-395 - Program Office					
CC-370 - Security & Risk Mgmt					

ITP – Sensitive Columns and Sensitive Financials

- Sensitive Columns
 - Only for the Labor Tab
 - Set in the Labor Schema, by selecting the column
- Sensitive Financials
 - Any line item generated by Labor Allocation Rules

Cost Object Permissions

Permissions | Departments

Using Departments from: FY2023 July Forecast - ReqsSync View: Hierarchy List

Cost Object	Owner(s)	Editor(s)	View Only	Can View Sensitive Columns	Can View Sensitive Financials
▼ All Departments					
▼ APPS - App Dev & Support					
CC-200 - Apps - Back Office		cco1		cco1	cco1
CC-210 - Apps - Line of Business		rob.deleo		rob.deleo	rob.deleo
CC-220 - Apps - Sales & Ops		rob.deleo		rob.deleo	rob.deleo
▶ APPDEV - Application Development & Support					
▶ INIT - Business-funded Initiatives					
▶ EUS - End User Services					
▶ I&O - Infra & Ops	rob.deleo			rob.deleo	rob.deleo
▶ CIO - Office of the CIO					

Configuration Schema

Labor
Configure what attributes define Labor.

Available Attributes Add

Search by Name

Adjust	Boolean
Adjustment %	Percentage
Adjustment Effective Date	Date
Amount	Decimal
Base Compensation	Money

Edit System Attribute

Field Name *
Base Compensation

Data Type *
Money

Default Value

Mandatory for Data Entry Sensitive Data

Cancel Save

IIP - Project Permissions

- Restrict Access to Projects in IIP
 - For the new Project Manager roles
 - Can grant Edit or View Only Access

The screenshot displays the APPTIO IIP interface. The left sidebar shows the navigation menu with 'Projects' highlighted. The main content area is titled 'Projects' and has a 'Permissions' tab selected. The table below lists various projects with 'Edit' and 'View Only' permissions.

APPTIO an IBM Company

FY2024 June Forecast Forecast: New

Projects

List Permissions

Project	Edit	View Only
✎ All Projects		
✎ Back Office - Back Office		
✎ P153 - Workday Fin/HR Replacement		
✎ P048 - UK Call Center Expansion		
✎ P193 - BI Analytics Enhancements		
✎ P030 - SAP Fin/HR Decommission		
✎ P005 - CH Call Center Expansion		
✎ Compliance - Compliance		
✎ P175 - Regulatory Compliance Ph 4		

Show/Hide Columns...

ITP - Permissions

- Restrict Access to Tabs in ITP
 - Clone Cost Center Owner
 - Remove the View Permission

Roles

Clone Role ✓ Select Environment ✓ Define Role ● Select Permission(s) ○ Confirmation Cancel Back Next

Select the Permission(s) that will make up the Role.

Selected Permissions (9) [Clear All](#)

CanComment ✕ EditPlanning ✕ ITPCompensationAdjustmentEdit ✕ Self-Service Reporting Access ✕ ViewAssets ✕ ViewContracts ✕ ViewLabor ✕ ViewPlanning ✕ ViewSpendManagement ✕ [Show less](#)

Search Permissions ▼ Application Type ▼

+	Permission Name	Description	External	Standard Role Only
+	Access Catalog Latest Versions	The ability to access unpublished catalog artifacts	Yes	No
+	Access Catalog UI	The ability to open the Apptio catalog UI (read only)	Yes	No
+	Access Targetprocess	Permission to access Targetprocess	Yes	No
+	AccessDev	Access development environments	Yes	No

Report Collection Permissioning

- Project Tab
 - Report Collections
 - Assign what reports who in the collection and what roles can view the collection.

The screenshot shows the software interface with the 'Project' tab selected. The 'Report Collections' menu item is highlighted. A 'Manage Report Collections' dialog box is open, showing a list of collections on the left and configuration options on the right.

Manage Report Collections

Selected Collection: IT Financials

Hide in Report Collections menu.

Viewable By:

Everyone

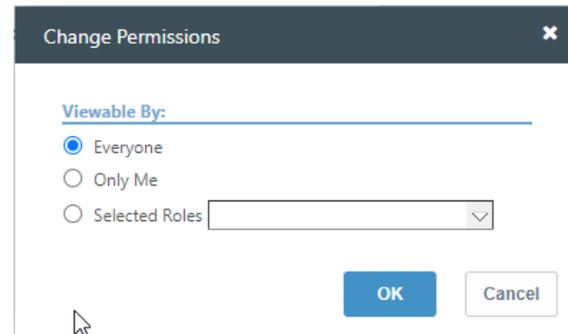
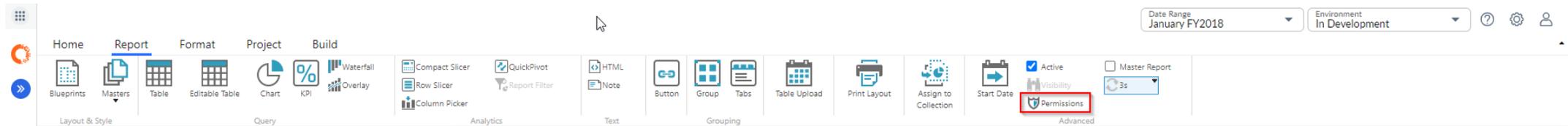
Selected Roles:

Financial Review	<input checked="" type="checkbox"/> Show in navigator
Alias: Not specified	
Financial Analysis	<input checked="" type="checkbox"/> Show in navigator
Alias: Not specified	
Cost Pool Analysis	<input checked="" type="checkbox"/> Show in navigator
Alias: Not specified	
Financial Analysis - OpEx Transaction	<input type="checkbox"/> Show in navigator
Alias: Not specified	
Financial Analysis - CapEx Trend	<input type="checkbox"/> Show in navigator
Alias: Not specified	

Buttons: Add Collection, Delete Collection, Close

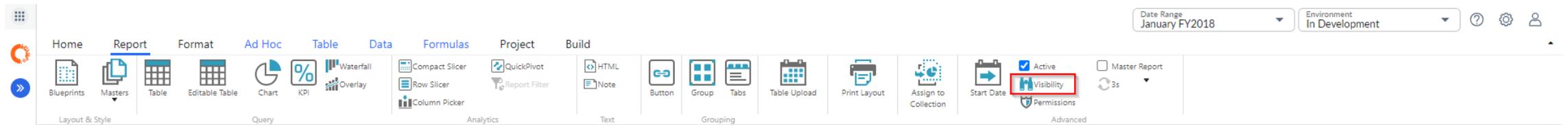
Report Permissioning

- Report Tab
 - Permissions
 - Sets what roles can see the individual report.



Report Component Visibility

- Report Tab
 - Visibility
 - Sets what role can see the individual component.
 - Can also use Dynamic text to hide component.



Report Component Visibility [X]

Show Component Only If

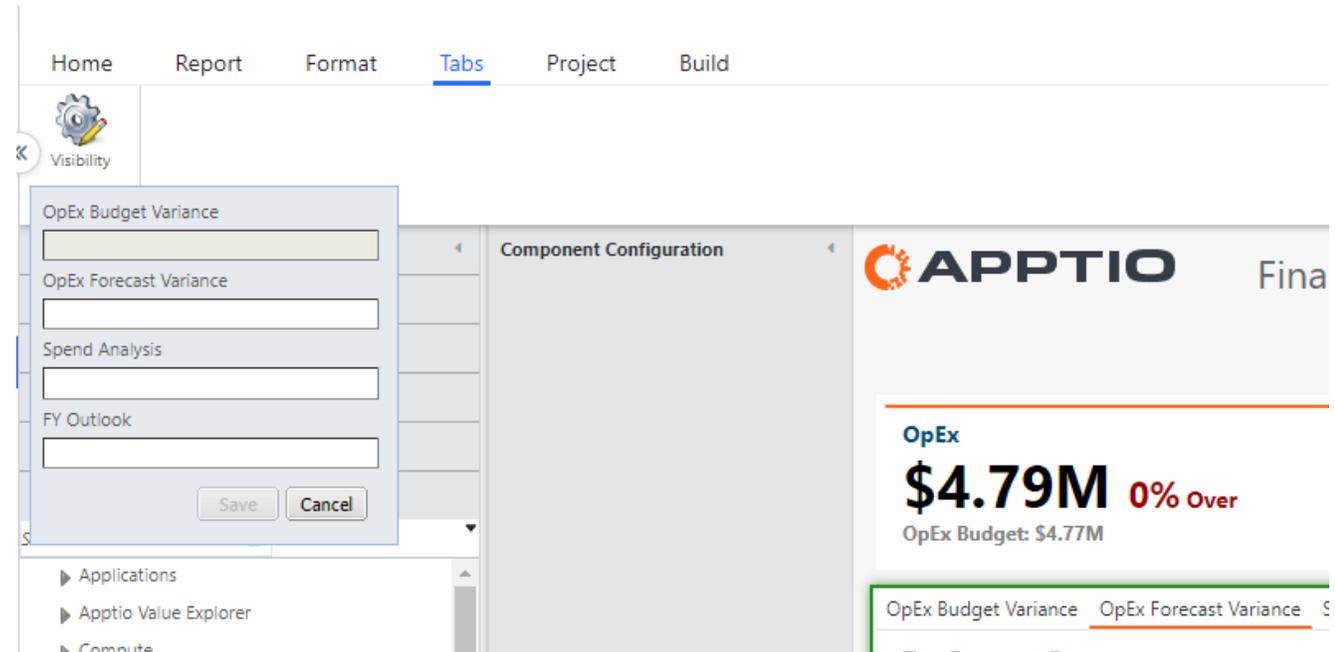
Component contains data

User's current role is

Dynamic text does not evaluate to "hidden"

Tab Component Visibility

- Tab Component Visibility
 - Visibility
 - `<%=IF(eval("${CurrentUser}":{"Users.Role"}))
="Admin","enabled","hidden")%>`



Row Level Security

Row Level Security

- Purpose
 - To limit visibility of rows of data within reports and editable tables
 - Allows user to more quickly view the data they care about
 - Prevent users from viewing data that they should not have access to



Discussion

- Is anyone leveraging the Row Level Security feature within their Projects?
- Why are you using the Row Level Security feature?
- How are you managing the tables for Row Level Security?



Row Level Security

Environment
In Development

- Customer Selection
- Access Administration
- Multi-Currency Configuration
- New Project...
- Import...
- Change Domain...
- Speedtest
- Data Advisor
- Reference Applications
- Configure Row-Level Security
- Task Manager
- What's New
- About

Home Project Build

View New Save Check Out Check In Revert Changes Rename Delete Undo Redo Cut Copy Paste Update Document Update Workspace Auto Calculate Create Version Remove Version Export 3s Recommendations

Project Explorer

Tables

Search All

General

Row Level Security Demo

This document is read only - check it out to make changes.

Steps

Table Final processed table

	User Email	Cost Center	Department ID
Source			
Upload	eric.chan@regoconsulting.com	CC-200	Dept-01
	eric.chan@regoconsulting.com	CC-210	Dept-01
	eric.chan@regoconsulting.com	CC-220	Dept-10
	eric.chan@regoconsulting.com	CC-221	Dept-10
Table	Rob.DeLeo@regoconsulting.com		Dept-10
	Rob.DeLeo@regoconsulting.com		Dept-01

Row Level Security (Cont.)

Steps ← **Row-Level Security** ⓘ Specify a per-user security filter on a table of data

Add condition(s) to show rows for selected users:

intersects where user is ✕

OR

intersects where user is ✕

Enter username to preview Row-Level Security:

Cost Source Master Data.Cost Center	Cost Source Master Data.Journal ID	Cost Source Master Data.Journal Line ID	Cost Source Master Data.Account Group	Cost Source Master Data.Account Subgroup
CC-200			Salaries & Benefits	Benefits
CC-210			Salaries & Benefits	Benefits
CC-220			Salaries & Benefits	Benefits
CC-200			Salaries & Benefits	Benefits
CC-210			Salaries & Benefits	Benefits
CC-220			Salaries & Benefits	Benefits
CC-200			Salaries & Benefits	Benefits
CC-210			Salaries & Benefits	Benefits

API Tokens

- Purpose:
 - Access to Apptio to download and/or upload data
- Examples
 - Download tables from TBM Studio
 - Download reports
 - Upload tables

The screenshot displays the Apptio user management interface for the user **eric.chan@regoconsulting.com**. The interface is divided into two main sections: a left sidebar and a main content area.

Left Sidebar:

- Header: "View, edit, and manage users' access and environ"
- Navigation: "Users" (selected) and "Environments"
- Search: "Search by" with input "eric" and "Search by" below it.
- Domain: "Select Domain (optional)" dropdown.
- Path: "Users > eric.chan@regoconsulting.com"
- Action: "Remove Access"
- Table: A table with one column labeled "Environment".

Main Content Area:

- Header: "eric.chan@regoconsulting.com" with a three-dot menu icon.
- Navigation: "Properties" and "API Keys" (selected).
- Actions: "+ API Key" button, "Explore" button with a back arrow, and icons for refresh, signal, and download.
- Table:

Name	Expiration Poli...	Expiry	Description	Environments
API Testing Key	No Expiration		Allow the Data Management team to set up API to upload data	regoconsultingpartner.com:sandbox
Testing Key	No Expiration			

Surveys

Please take a few moments to fill out the class survey.
Your feedback is extremely important for future events.



Thank You For Attending Rego University

Instructions for PMI credits

- Access your account at pmi.org
- Click on **Certifications**
- Click on **Maintain My Certification**
- Click on **Visit CCR's** button under the **Report PDU's**
- Click on **Report PDU's**
- Click on **Course or Training**
- Class Provider = **Rego Consulting**
- Class Name = **regoUniversity**
- Course **Description**
- Date Started = **Today's Date**
- Date Completed = **Today's Date**
- Hours Completed = **1 PDU per hour of class time**
- Training classes = **Technical**
- Click on **I agree** and **Submit**



Let us know how we can improve!
Don't forget to fill out the class survey.



Phone

888.813.0444



Email

info@regoconsulting.com



Website

www.regouniversity.com



rego consulting

Let Rego Be Your Guide

