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Orlando 2025

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Apptio • Targetprocess • Cloudability

Data Visibility and Access Controls in Apptio

Your Guides:

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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

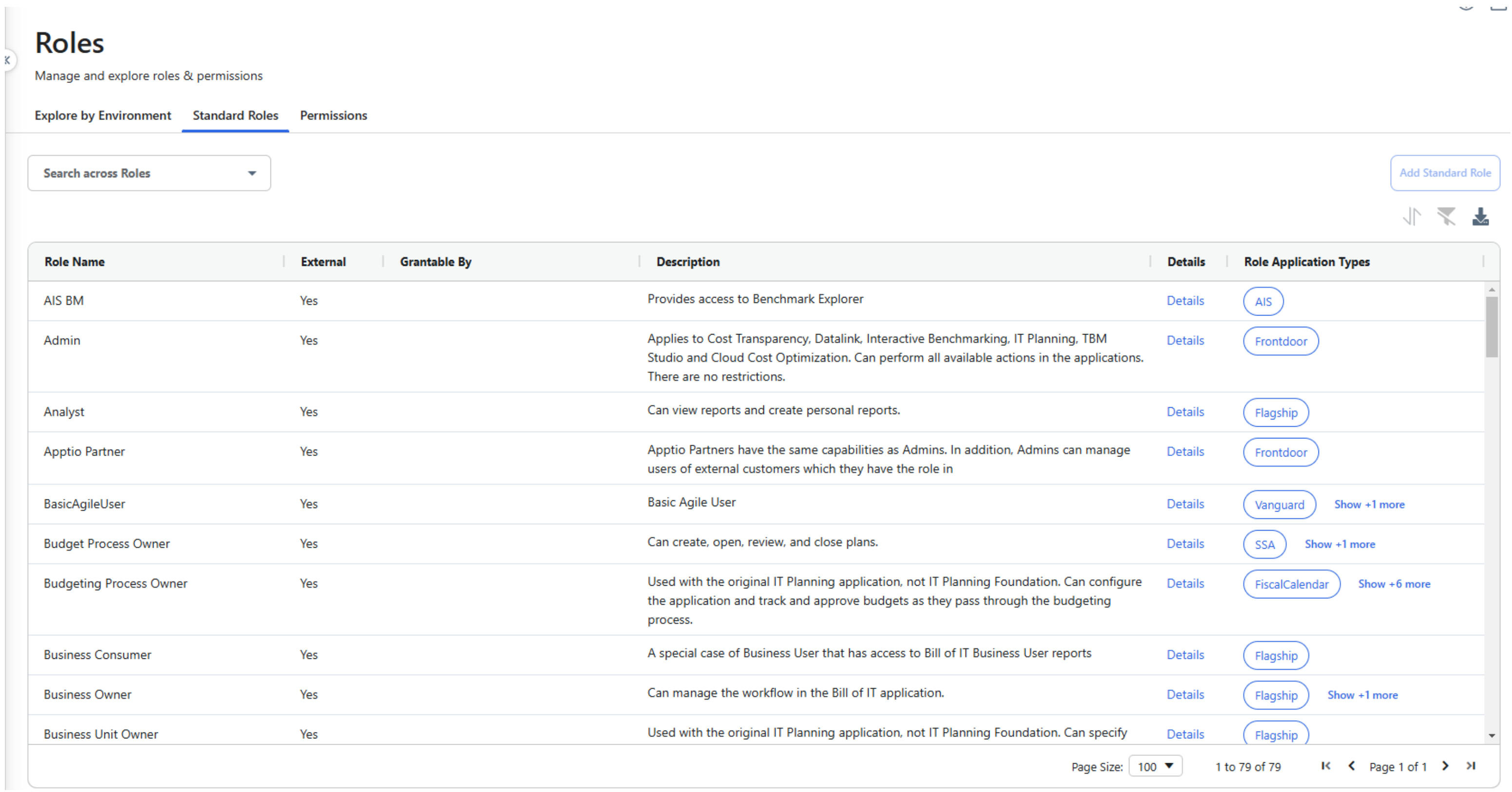
Discussion

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

Apptio Roles

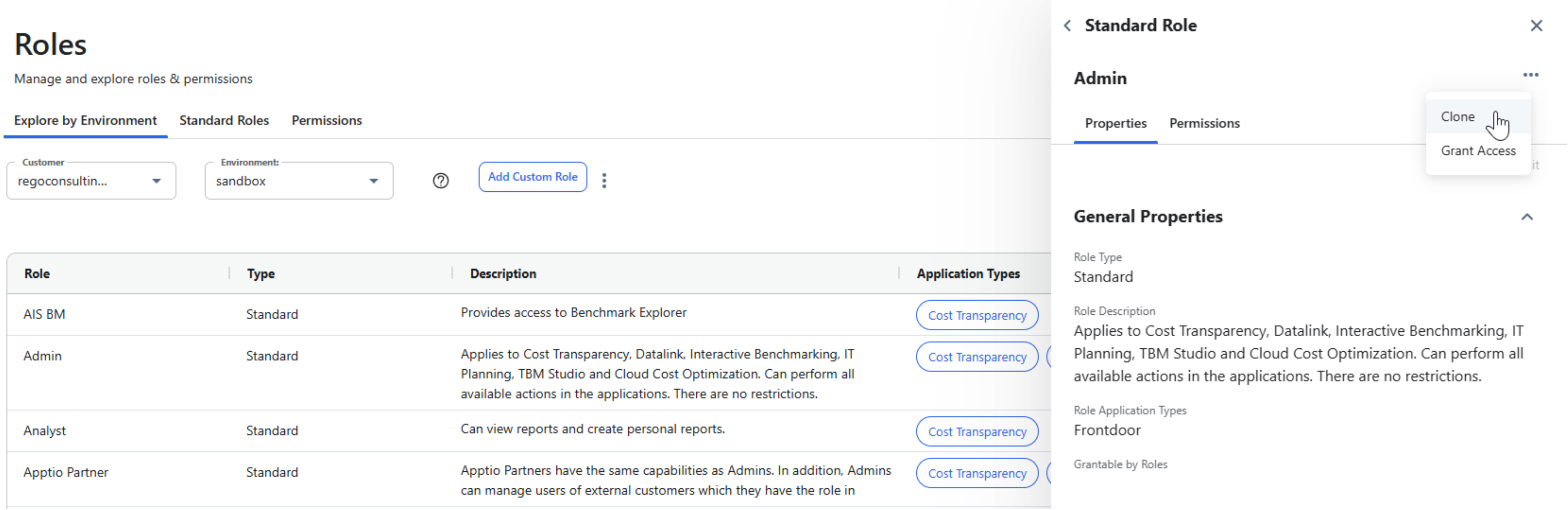
Standard Roles vs Custom Roles

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



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.



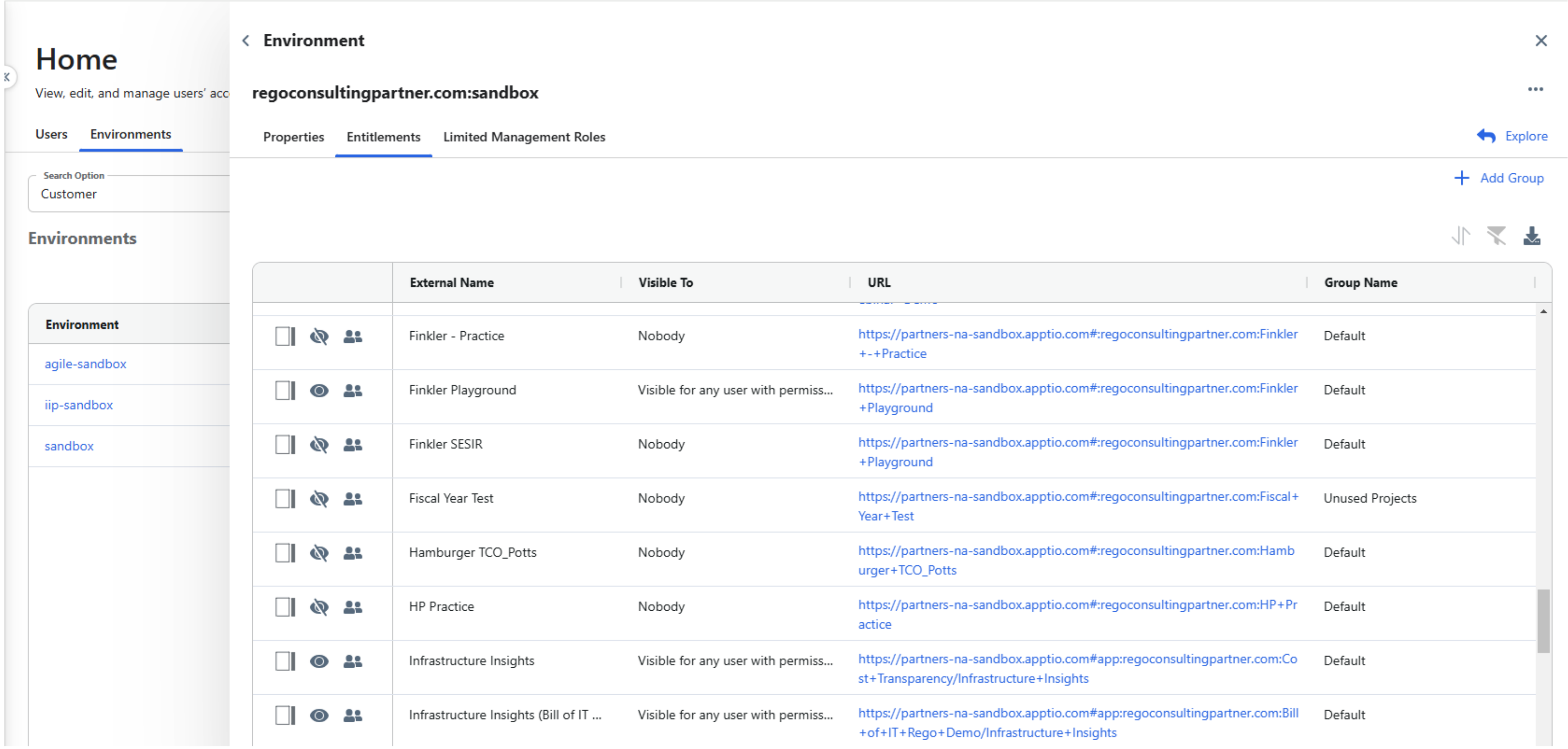
Discussion

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

Application Access

Application Permissioning

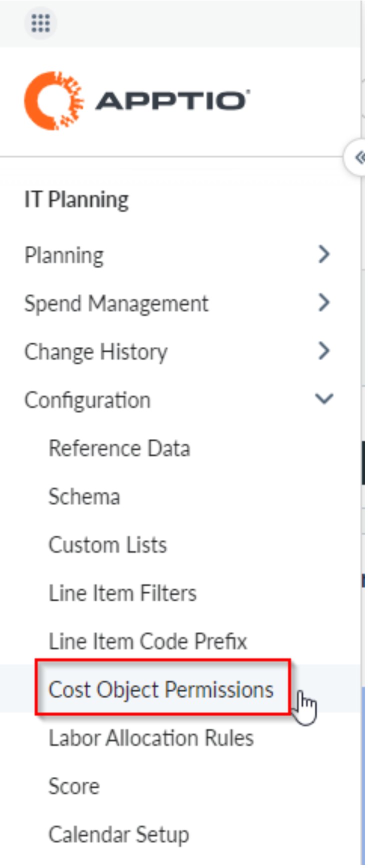
- Frontdoor – Applications
  - Control what shows on the Homepage with Visibility by role.

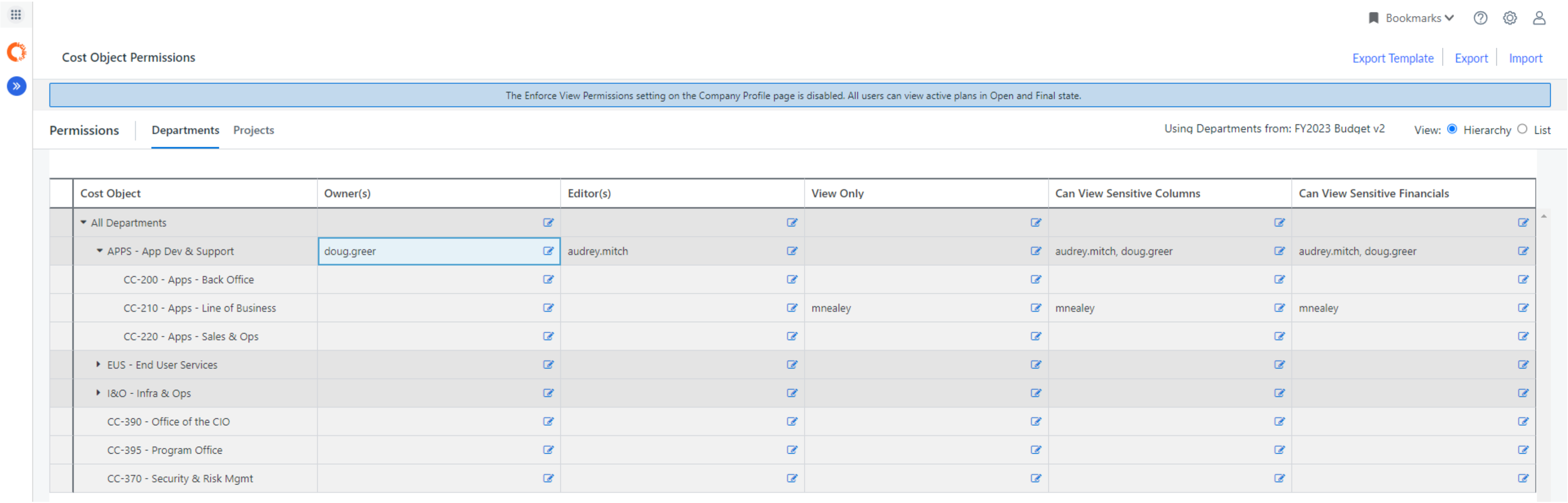


ITP Access

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

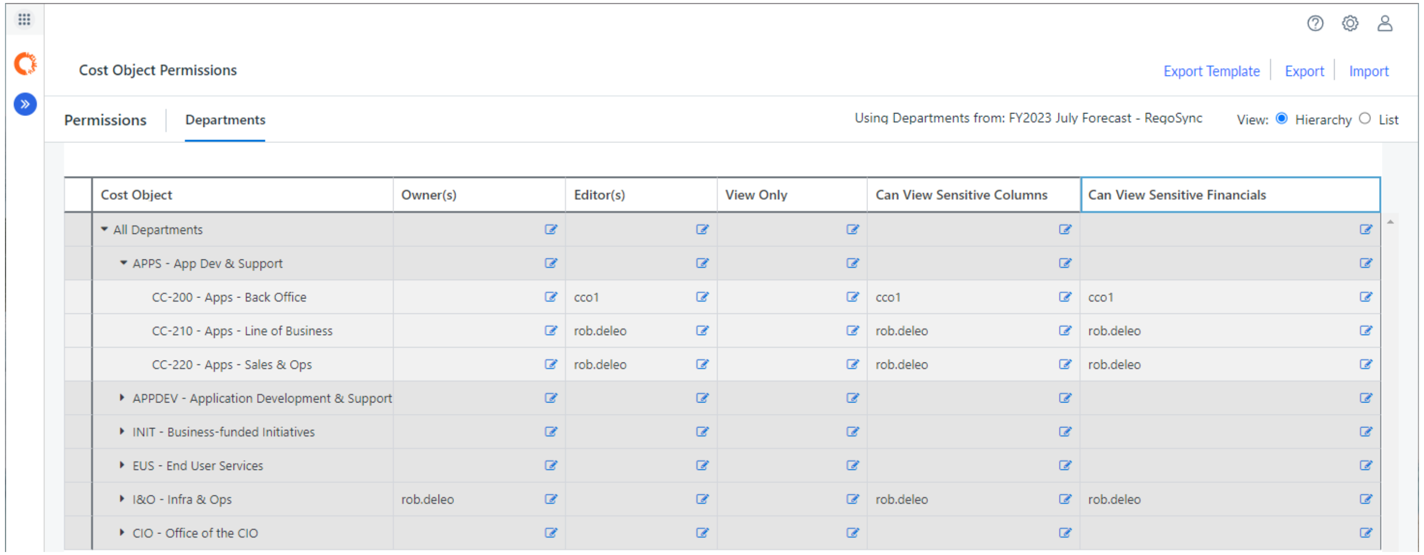




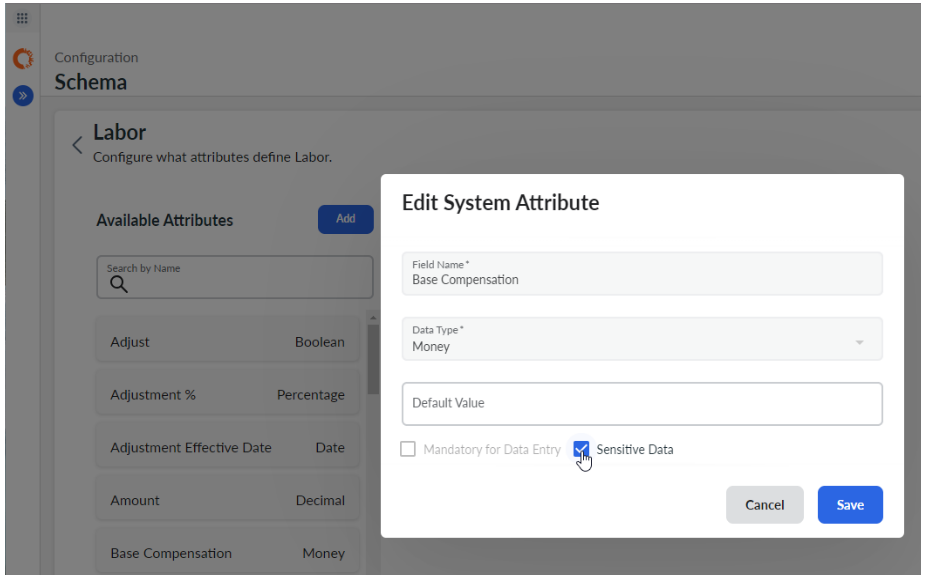
Cost Object	Owner(s)	Editor(s)	View Only	Can View Sensitive Columns	Can View Sensitive Financials
All Departments					
APPS - App Dev & Support	doug.greer	audrey.mitch		audrey.mitch, doug.greer	audrey.mitch, doug.greer
CC-200 - Apps - Back Office					
CC-210 - Apps - Line of Business			mnealey	mnealey	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

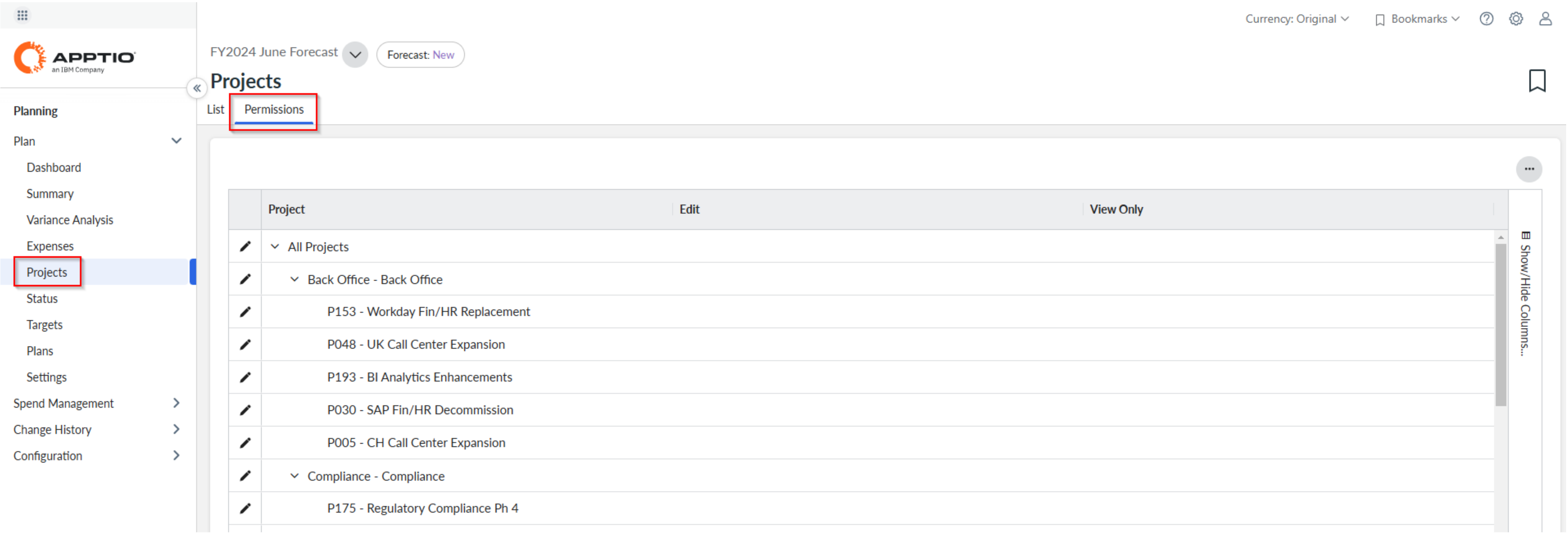


Cost Object	Owner(s)	Editor(s)	View Only	Can View Sensitive Columns	Can View Sensitive Financials
All Departments					
APPS - App Dev & Support					
CC-200 - Apps - Back Office		cco1		cco1	cco1
CC-210 - Apps - Line of Business		rob.deleo		rob.deleo	rob.deleo
CC-220 - Apps - Sales & Ops		rob.deleo		rob.deleo	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					



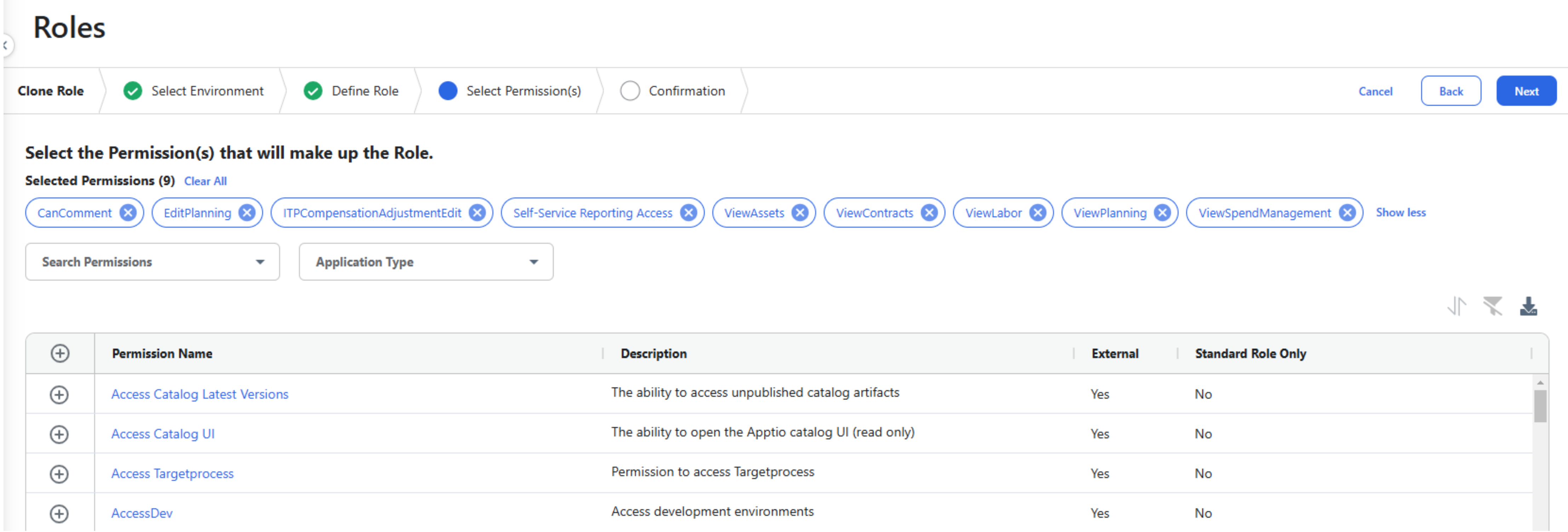
IIP - Project Permissions

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



ITP - Permissions

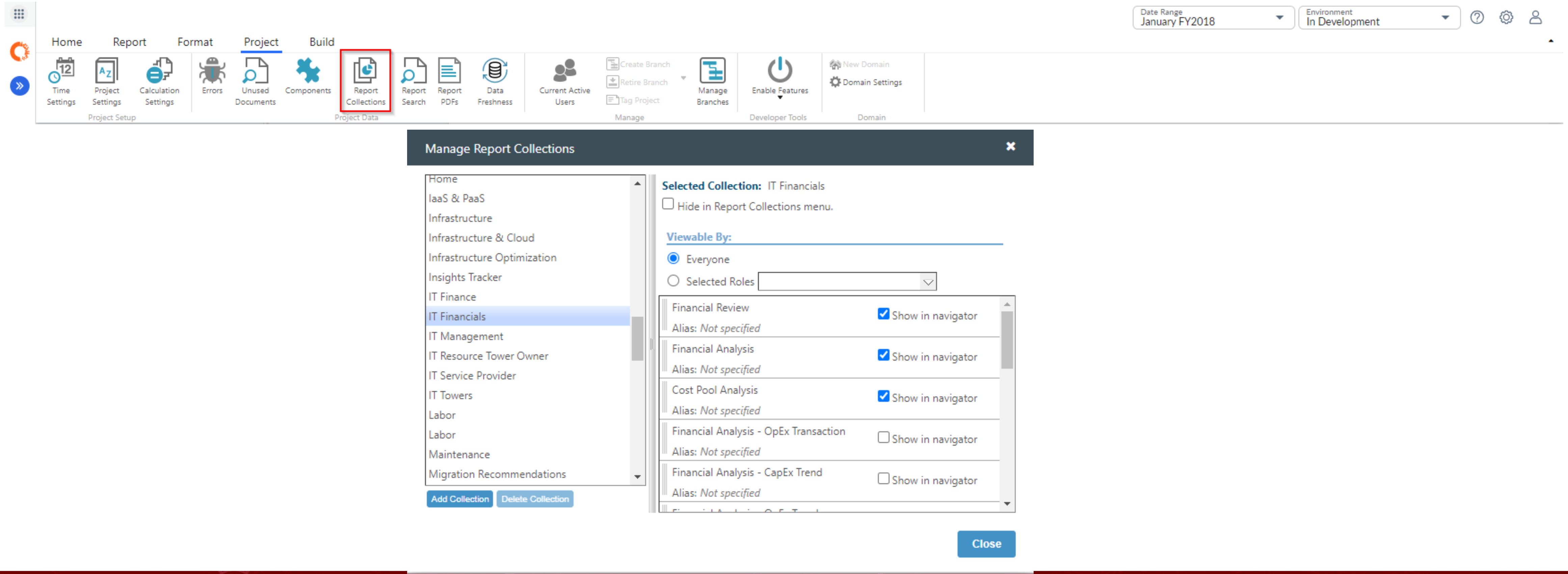
- Restrict Access to Tabs in ITP
  - Clone Cost Center Owner
  - Remove the View Permission



Report Access

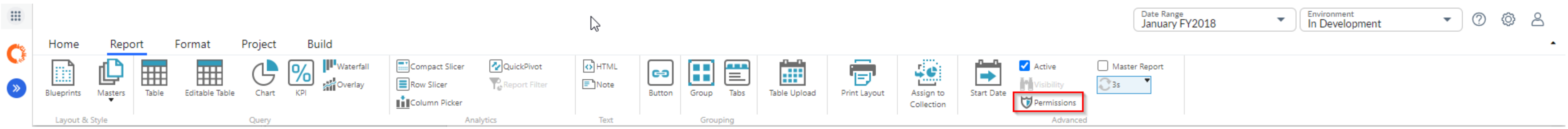
Report Collection Permissioning

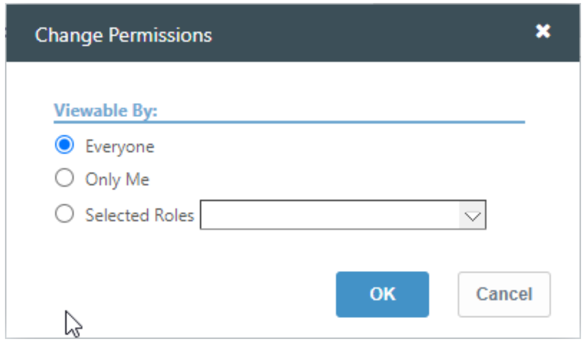
- Project Tab
  - Report Collections
    - Assign what reports who in the collection and what roles can view the collection.



Report Permissioning

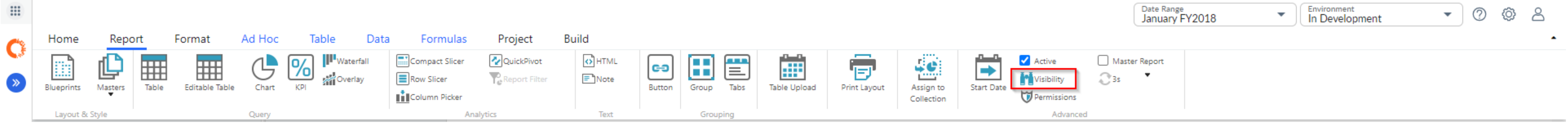
- Report Tab
  - Permissions
    - Sets what roles can see the individual report.

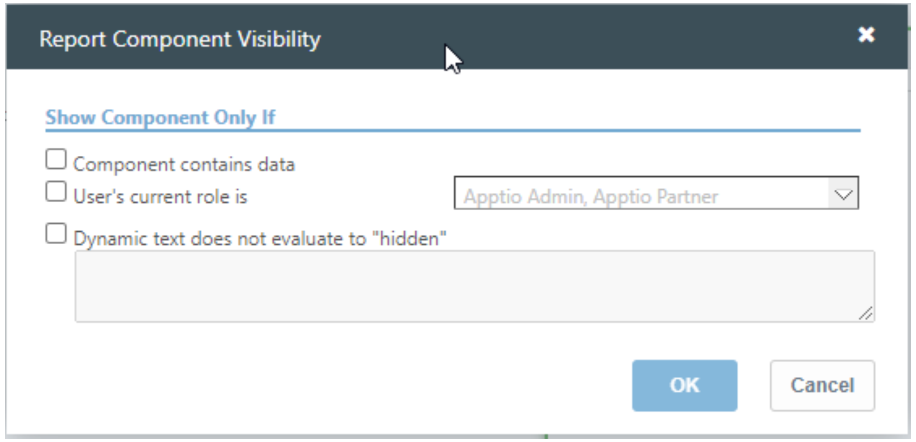




Report Component Visibility

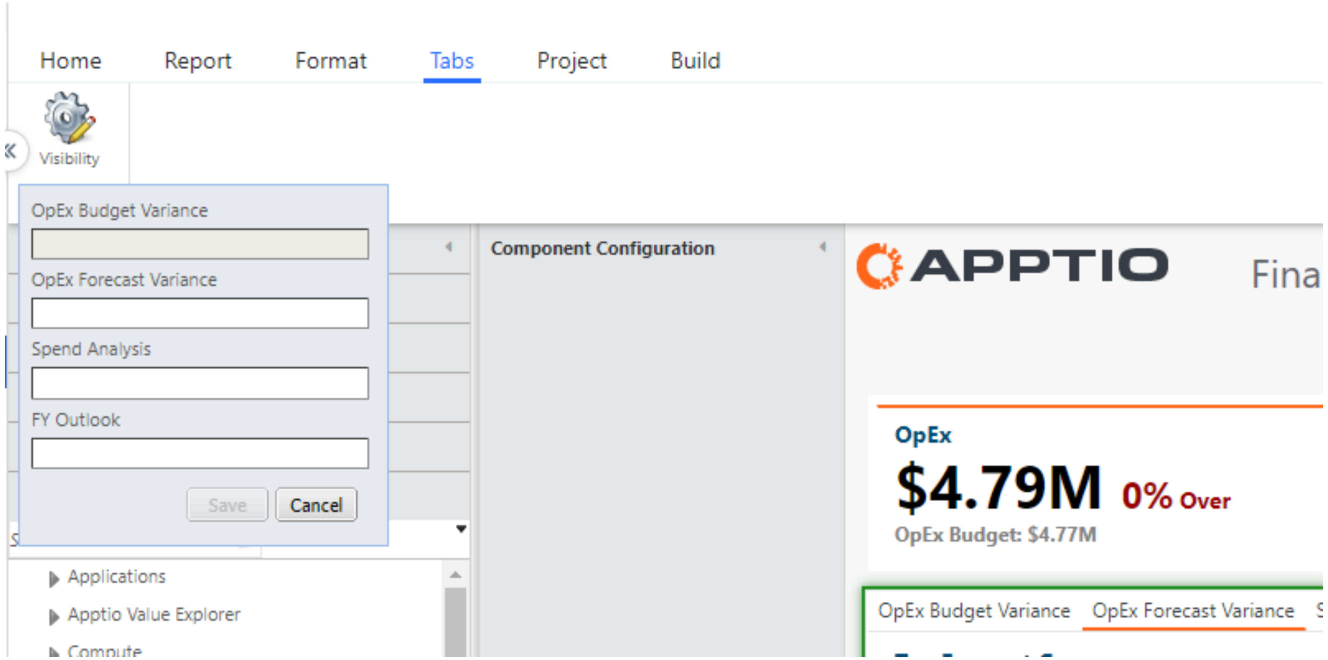
- Report Tab
  - Visibility
    - Sets what role can see the individual component.
    - Can also use Dynamic text to hide component.





Tab Component Visibility

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



Row Level Security

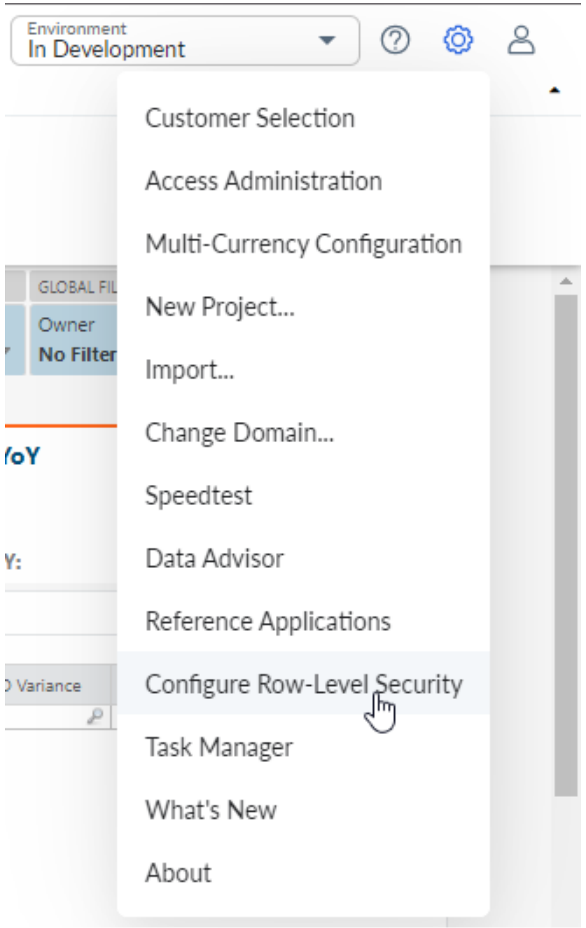
Row Level Security

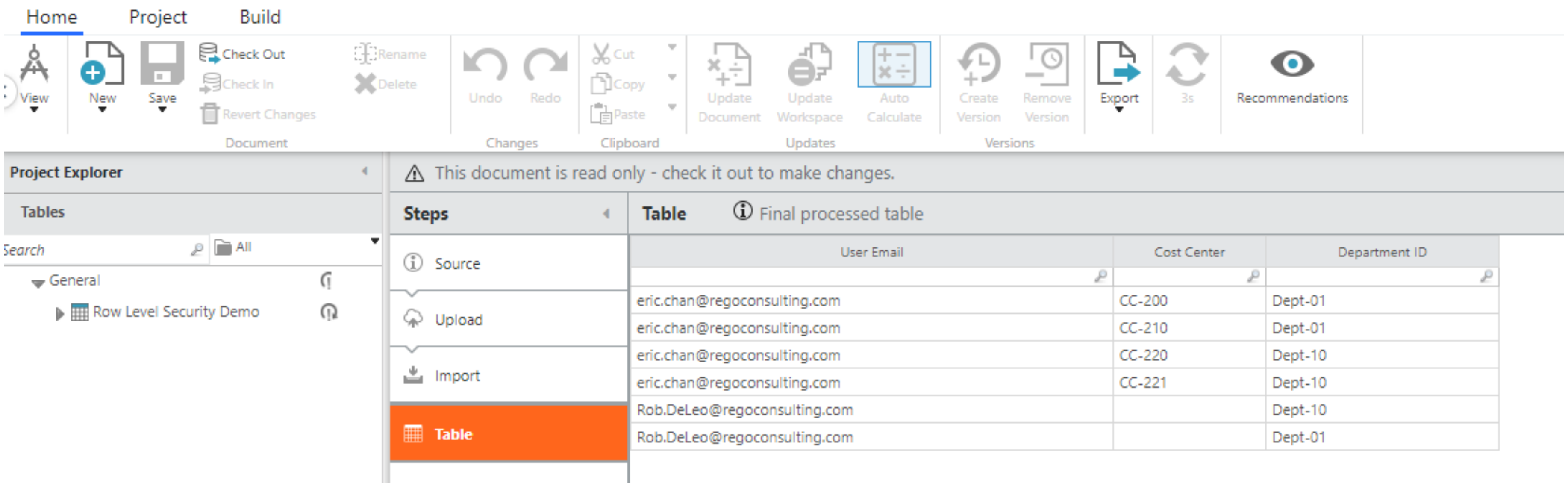
- Purpose
  - To limit visibility of rows of data within reports and editable tables
  - Allows user to more quickly view the data they care about
  - Prevent users from viewing data that they should not have access to

Discussion

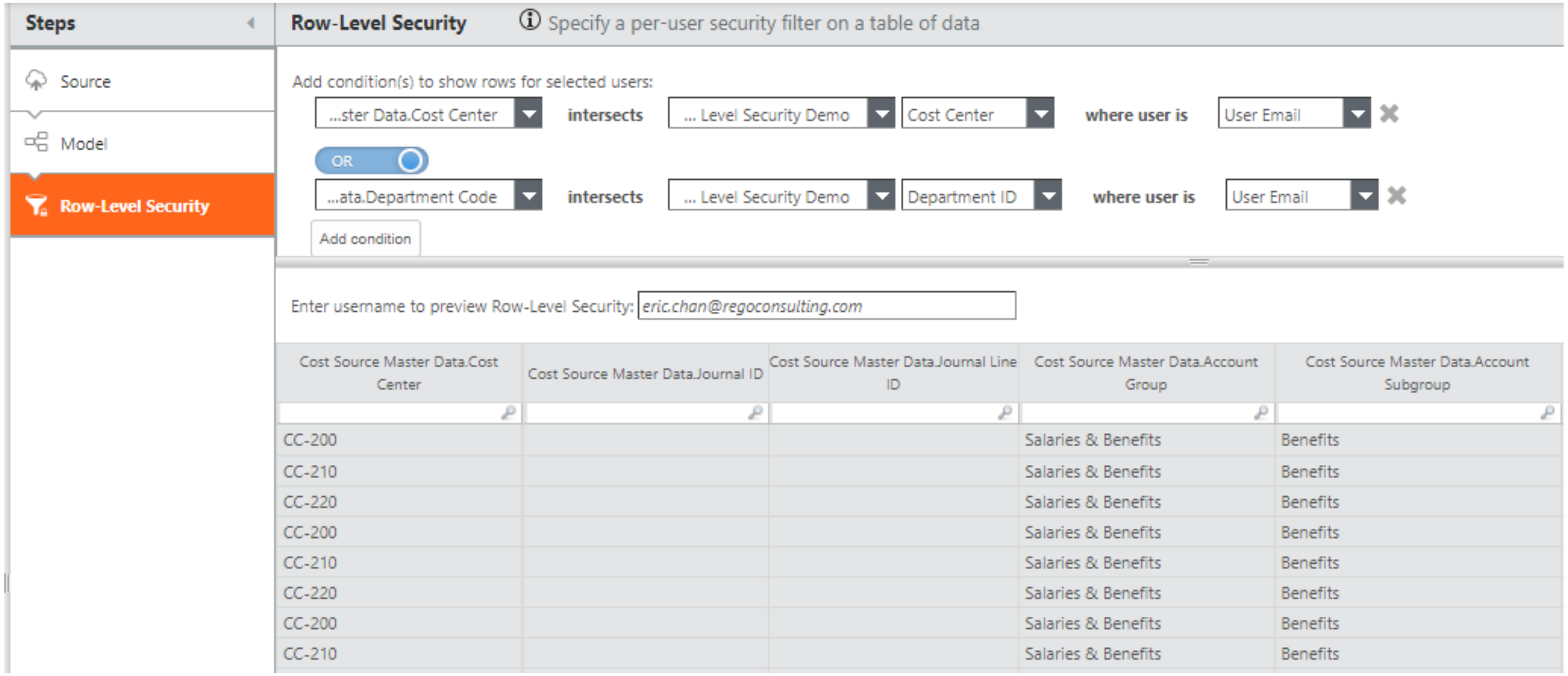
- Is anyone leveraging the Row Level Security feature within their Projects?
- Why are you using the Row Level Security feature?
- How are you managing the tables for Row Level Security?

Row Level Security



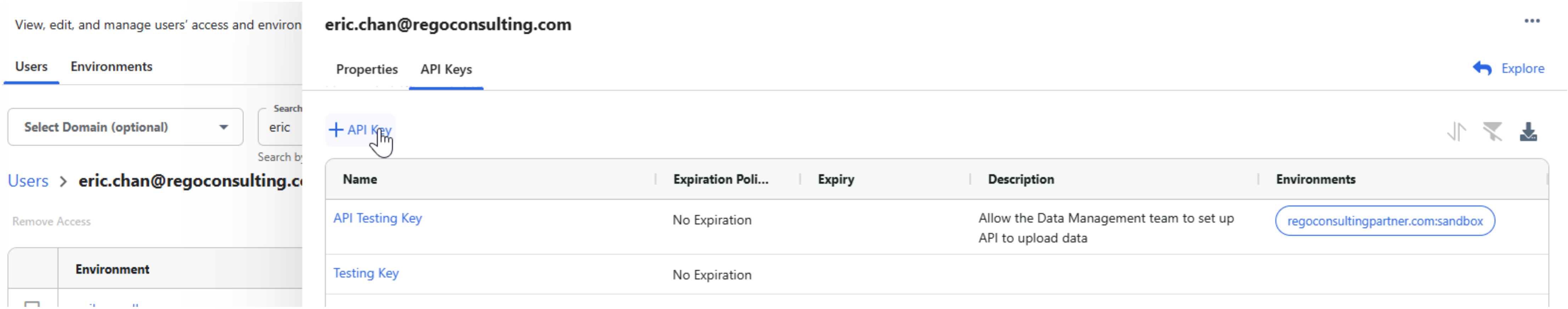


Row Level Security (Cont.)



API Tokens

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



Questions?

Surveys

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Your feedback is extremely important for future events.

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- Class Name = **regoUniversity**
- Course **Description**
- Date Started = **Today's Date**
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