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Improving the User Experience of your Apptio Stakeholders

Your Guides:
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Part I: Introduction

Introductions

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

Agenda

- User Experience Best Practices
- Typical TBM User Personas
- Common Pitfalls with OOTB Apptio
- Security Configuration
- Useful Customizations
- Reporting Optimization

Part 2:

User Experience Best Practices

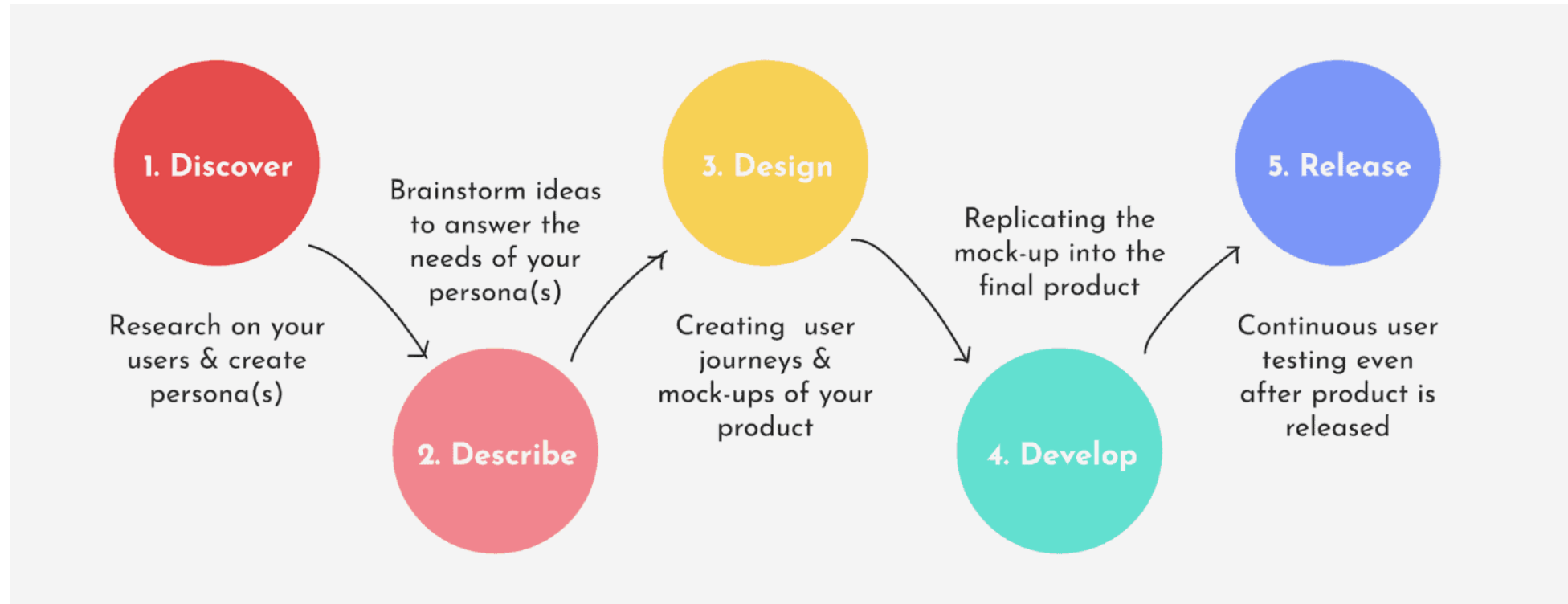
What is User Experience?

- ISO 9241 defines user experience (UX) as a “user’s perceptions and responses that result from the use and/or anticipated use of a system, product or service”



User Experience Design Process

7



User Experience Design Guidelines

- ✓ Simple and Intuitive
- ✓ Engaging
- ✓ Efficient
- ✓ Consistency

How do you feel the Apptio OOTB reports meet these guidelines?

Part 3: Typical TBM Personas



Key IT Players in TBM

CIO & OCIO Staff



Make Fact-Based
Decisions to Shift
Run to Grow

- Optimize Run vs. Change
- Align Project Spend to Initiatives
- Drive Cost Optimization
- Align Spend to Biz Priorities

I&O Leaders (Infra Platforms)



Drive Efficiency and
Demonstrate Business
Alignment

- Optimize Infra TCO/Unit Costs
- Reduce Technical Debt
- Drive Use of Standard Infra
- EOL At-Risk Technologies

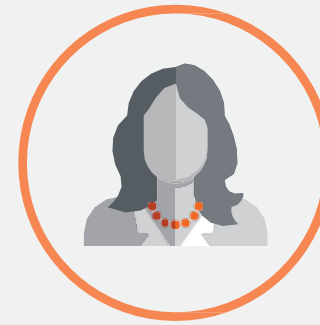
CFO of IT (IT Financial Manager)



Establish Governance
and Drive IT Financial
Planning

- Measure/Report Fixed/Variable
- Manage IT Budgeting Process
- Identify Cost Reduction Opps
- Manage Under/Over Recovery
- Drive Rates Management

Solution Owner



Manage and
Improve Solution
Value

- Manage Solution TCO
- Set/Manage Solution Rates
- Manage Build vs. Run
- Rationalize Solution Apps
- Drive Decommission Decisions

Business Relationship Managers



Align Resources to
Business Priorities

- ID Biz Priorities vs. IT Spending
- Create Levers to Shape Demand
- Help Biz Optimize Consumption
- Communicate Consumption

Additional Players in TBM

Technical Architects



Drive Efficiency of Standard Configurations

- Manage TCO of Standard Builds
- Drive Refresh Decisions
- Monitor Compliance with Standards and Cost of Non-Compliance

Enterprise Architects (Business Architecture)



Align IT Plans with Business Strategy & Planning

- Define Business Capabilities
- Manage Composition of Capabilities, incl. underlying IT
- Manage Capability TCO/Consumption

Line of Business Leaders



Make Fact-Based Choices about IT Consumption & Value

- Contribute to Portfolio-Level Investment Decisions
- Make BU-Level Consumption Choices
- Evaluate IT Impact on LOB Perf

Solution Consumers



Choose IT Solutions to Improve Work and Individual Outcomes

- Choose IT solutions based on cost/value consideration
- Help optimize consumption to meet business financial goals
- Feedback on svc. performance



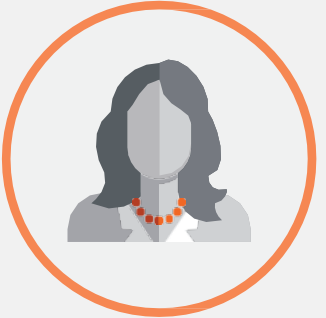


TBM Office Personnel



Create Transparency to Deliver Value and Shape Demand

- Maintain model and data
- Provide standard and ad-hoc TBM reporting
- Advise decision makers on using reports

Additional Players in TBM (cont.)

Corporate CFO	IT PMO (Project/Portfolio Mgmt.)	Tower/Resource Owners	Vendor/Category Managers	Governance, Risk & Compliance
				
<p>Create Proper Accountability Model for BUs and IT</p> <ul style="list-style-type: none"> Align financial accounting model to cost model Create/manage incentives for desired outcomes Provide source financials 	<p>Provide Governance of Project Performance and Cost</p> <ul style="list-style-type: none"> Create portfolio management governance model Establish project financial management discipline Oversee project portfolio 	<p>Drive Cost-Efficiency in Service Inputs</p> <ul style="list-style-type: none"> Benchmark tower costs Budget for resources required Determine tower rates Collaborate with procurement on cost-effective options 	<p>Align Vendor Spending and Performance to Business Priorities</p> <ul style="list-style-type: none"> Monitor/manage vendor spend Establish vendor categorization and governance Align vendor spending to corporate priorities 	<p>Oversee Compliance and Shape Policies to Ensure Biz Alignment</p> <ul style="list-style-type: none"> Set policies for risk Articulate risk vs. cost tradeoffs Measure corporate risk spending/resources Evaluate mitigation options

Understanding Your Stakeholders

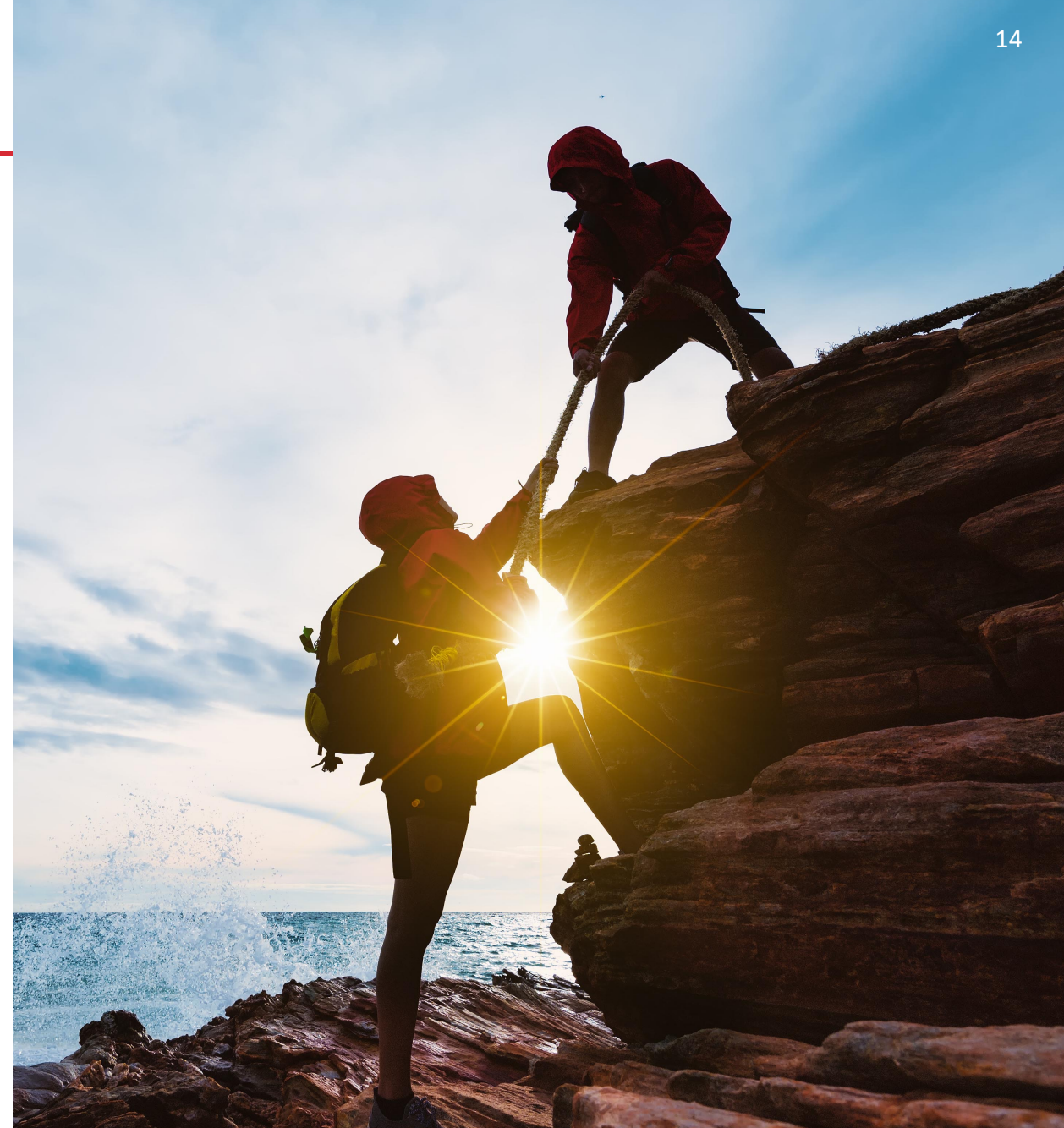


TBM Stakeholder
Analysis Map

The TBM Council Adoption Strategy committee released this early version in Jan 2025. The purpose of this artifact is to help document the stakeholders, understand their roles & perspectives, plan for engagement with the TBMO, and track their engagement.

Discussion

- Any examples of dashboards you've built specifically for any of these personas
- How do you engage with your stakeholders to find out what they need/want?
- Does anyone have an engagement success story they would be willing to share?



Part 4: Common Pitfalls with OOTB Apptio Reports

Common Challenges with Apptio OOTB Reports

- Missing data will impact quality of OOTB reports
- Too many reports with similar views
 - But reporting from different layers of the model
- Default KPI's may not show financial metrics that are familiar to users
 - KPI's using labels not familiar within the organization
- Too many drill paths, 3-4 layers of drills
- YTD reports drilling to MTD reports
 - Very common to prevent long calc times
 - Inconsistent user experience

Discussion

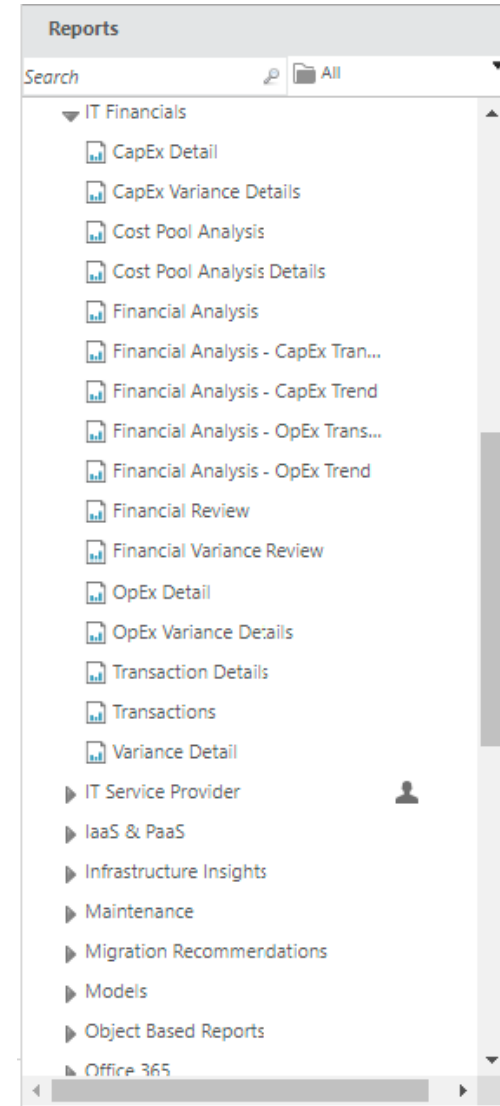
- How have the OOTB reports worked for your organizations?
- Does your organization compare Apptio to data visualization tools like Tableau and PowerBI?

Part 5: Useful Customizations

Customizations will happen and need to happen to meet use cases and provide value

It's OK to customize Apptio OOTB reports

- Too many OOTB reports manage
- Most organizations focus on a few specific use cases
- OOTB reports can be overwhelming
 - Cover a wide range of uses cases
 - Only a few components within a report may be useful
 - Multiple drills are required to answer questions
- OOTB reports don't resonate with the organization
- Quality control
 - Many broken charts and graphs
 - Inconsistent naming of columns/charts/ etc.



Custom Reports = Value

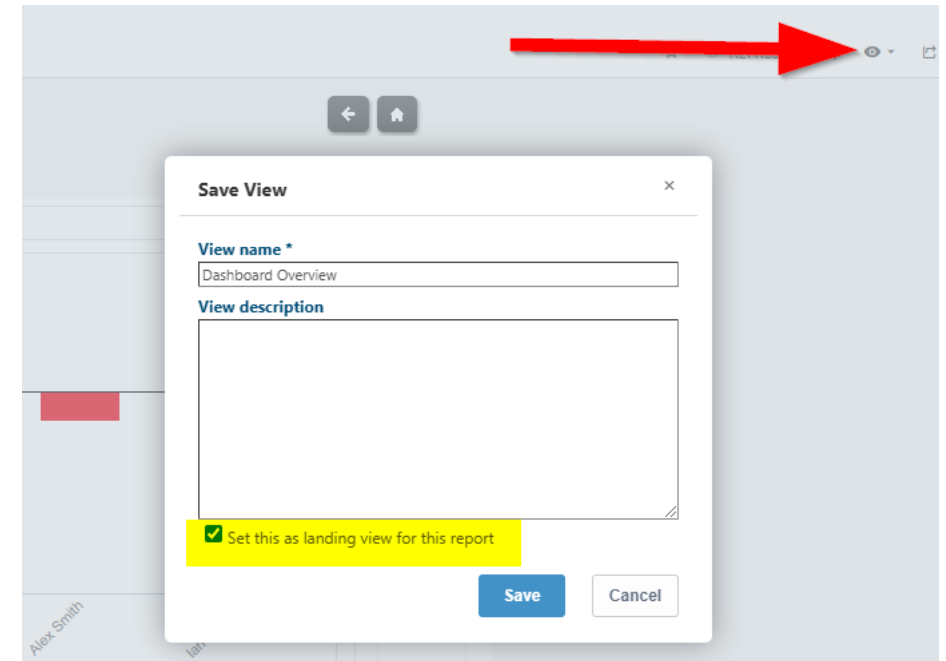
- Show value, quickly!
 - Simple, direct, clean reports
- Build relationships across the organization
- Get buy in (look beyond OOTB reports)
 - Create reports in Apptio to help save time for other personas
- Get users logging into Apptio more often

Part 6: Customizing the Reporting Experience

Reduce the clicks, save views, and configuring favorites

Setting a Landing Page

- Set your filters and customizations
- Select the eye icon at the top left of the report
- Select Save View
- Check the box to set the view as the landing page



Leverage Views to Reduce Future Clicks

- Before

Financial Review Financial Analysis Cost Pool Analysis

APPTIO[®]
an IBM Company

Financial Analysis

Region: No Filter Applied Account Group: No Filter Applied Cost Center and ID: No Filter Applied Cost Center Owner: No Filter Applied Owner: No Filter Applied

OpEx CapEx Variance Summary

OpEx Variance Analysis

Additional Details: ☒ Account Group ☐ Account Subgroup ☐ Account Name ☐ Cost Center

Account Group	Trend	Month over Month Variance				OpEx Budget YTD Variance				OpEx Forecast	
		OpEx	Previous Period OpEx	MoM Change	MoM % Change	OpEx YTD	OpEx Budget YTD	OpEx Budget Variance F/(U)	OpEx Budget Variance % F/(U)	OpEx Forecast YTD	OpEx Variance
Telecom	▲▲▲	\$377,165	\$369,151	\$8,015	2.2%	\$377,165	\$378,000	\$835	0.2%	\$0	
Consulting	▲▲▲	\$183,839	\$249,146	(\$65,307)	-26.2%	\$183,839	\$207,000	\$23,161	11.2%	\$0	
Technology	▲▲▲	\$1,957,147	\$2,373,551	(\$416,404)	-17.5%	\$1,957,147	\$1,949,700	(\$7,447)	-0.4%	\$0	
Depreciation	▲▲▲	\$531,791	\$446,758	\$85,033	19%	\$531,791	\$471,183	(\$60,608)	-12.9%	\$0	
Contract Labor	▲▲▲	\$324,519	\$338,631	(\$14,111)	-4.2%	\$324,519	\$345,833	\$21,314	6.2%	\$0	
Outside Services	▲▲▲	\$261,227	\$156,873	\$104,354	66.5%	\$261,227	\$272,333	\$11,107	4.1%	\$0	
Salaries & Benefits	▲▲▲	\$981,482	\$980,788	\$694	0.1%	\$981,482	\$979,413	(\$2,069)	-0.2%	\$0	
Facility & Office Admin	▲▲▲	\$173,702	\$182,224	(\$8,522)	-4.7%	\$173,702	\$170,883	(\$2,819)	-1.6%	\$0	

Views (Continued)

- After

Financial Review Financial Analysis Cost Pool Analysis

APPTIO
an IBM Company

Financial Analysis

Region: No Filter Applied Account Group: Consulting, Con... Cost Center and ID: Apps - Sales & ... Cost Center Owner: No Filter Applied Owner: No Filter Applied

GLOBAL FILTERS GLOBAL FILTERS GLOBAL FILTERS

OpEx CapEx Variance Summary

▼ OpEx Variance Analysis Additional Details: ☒ Account Group ☐ Account Subgroup ☐ Account Name ☐ Cost Center

Account Group	Trend	Month over Month Variance				OpEx Budget YTD Variance				OpEx Forecast	
		OpEx	Previous Period OpEx	MoM Change	MoM % Change	OpEx YTD	OpEx Budget YTD	OpEx Budget Variance F/(U)	OpEx Budget Variance % F/(U)	OpEx Forecast YTD	OpEx Forecast Variance
Salaries & Benefits	▲▲▲	\$129,256	\$129,906	(\$651)	-0.5%	\$129,256	\$132,667	\$3,411	2.6%	\$0	
Contract Labor	▲▲▲	\$71,622	\$69,435	\$2,187	3.1%	\$71,622	\$72,000	\$378	0.5%	\$0	
Consulting	▲▲▲	\$61,375	\$0	\$61,375		\$61,375	\$60,000	(\$1,375)	-2.3%	\$0	

REFRESH: 3s

- Save View
- Save As
- Reset All Slicers
- Reset Global Filters
- Reset to Default Report
- Consulting View ...
- My Cost Center Labor View ...

Favorite Reports

- Set favorite reports for easy access on the side bar

The screenshot displays the APPTIO Labor Review dashboard. At the top, there are tabs for 'Labor Review', 'Labor Analysis', and 'ITP - Labor Review'. A red arrow points to a star icon in the top right corner, which is used to mark a report as a favorite. Below the tabs, the dashboard shows four key metrics:

- Total Spend YTD:** \$1.3M (0% Even) - Total Spend Prev YTD: \$1.3M
- Labor as % of IT Spend YTD:** 24.8% (0% Even) - Labor as % of IT Spend Prev YTD: 24.8%
- Headcount:** 152 (0% Even) - Headcount Prev Yr: 152
- % External HC:** 22.4% - External Headcount: 34

Global filters for Region Hierarchy, Cost Center and ID, Cost Center Owner, and Owner are all set to 'No Filter Applied'. Below the dashboard, a sidebar menu is shown with the following items:

- Welcome!
- My Landing Page
- Recents
- Favorites
 - Labor Review
 - Report Collections

The 'Labor Review' report is highlighted in the sidebar, indicating it has been set as a favorite.

Part 7:

Security Configuration

Control data visibility or report access to specific information within reporting and studio.

Report Permissions & Visibility

- Permissions
 - Simple solution to control report access leveraging OOTB user roles or custom roles
 - Easiest to implement and manage
- Visibility
 - Advanced solution the control component level access within the report
- Customized reports, will affect content upgrades
 - But it isn't very difficult to troubleshoot/manage
 - Judgement decision based on frequency of content upgrades
 - Value Now vs Upgrade Conflict
- No data level control

Report Security and Visibility - Examples

Build

HTML Note Button Group Tabs Table Upload Print Layout Assign to Collection Start Date Active Visibility Permissions Master Report 3s

Text Grouping Advanced

GLOBAL FILTERS

Owner No Filter Applied

IT Financials

OpEx CapEx YTD

\$0 0% Even

CapEx Budget YTD: \$0

Change Permissions

Viewable By:

☒ Everyone

☐ Only Me

☐ Selected Roles

OK Cancel

QuickPivot Report Filter HTML Note Button Group Tabs Table Upload Print Layout Assign to Collection Start Date Active Visibility Permissions Master Report 3s

Analytics Text Grouping Advanced

GLOBAL FILTERS

Owner No Filter Applied

IT Financials

OpEx YTD OpEx CapEx YTD

\$0 0% Even \$0 0% Even \$0 0% Even

Budget YTD: \$0 Budget: \$0 CapEx Budget YTD: \$0

Current Month Quarter to Date Year to Date +

QTD OpEx Budget Variance by: Cost Pool

No data available

Report Component Visibility

Show Component Only If

☐ User's current role is Apptio Admin, Apptio Partner

☐ Dynamic text does not evaluate to "hidden"

OK Cancel

Row Level Security

- Provides data security for each row of data
 - Report layer
 - TBM Studio/datasets (if they have access to studio)
 - Best solution if full control over content is necessary
- Primary Use cases are for Business Owners or CC Owners only to see their data.
 - Personalized reporting without customizing
 - Most commonly used in Labor reporting
- BEWARE! If you have a report that drills thru to lower levels of the model. RLS only works on the top object.

Row Level Security - Setup

Date Range: April FY2023 | Environment: In Development

Export | 3s | Recommendations

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

Project Explorer

Tables

Search: All

General

Row Level Security Demo

Table ⓘ Final processed table

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

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

Row Level Security - Setup

Source

Upload

Add Step

Table

Append

Add rows from other tables

Date Partition

Spread this table across months

Filter

Conditionally remove rows

Flatten Hierarchy

Convert parent/child columns

Formulas

Create or change columns

Group

Consolidate multiple rows together

Hide and Rename

Hide and rename columns

Join

Add columns from other tables

Map Columns

Map columns to a master data set

Model

Allocate costs and other values.

Pivot

Convert rows into columns

Remove Duplicates

Select the best matching row

Row-Level Security

Specify a per-user security filter on a table of data

Unpivot

Collapse columns into rows

Validation

Define validation rules for the table

Row-Level Security Specify a per-user security filter on a table of data

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

...ter Data.Cost Center intersects Per Cost Center Cost Center where user is User ID

OR

...Master Data.IsAdmin intersects Admins IsAdmin where user is Admins

Add condition

Enter username to preview Row-Level Security:

Cost Source Master Data.Cost Center

CC-200

CC-210

CC-220

CC-200

CC-210

CC-220

CC-200

CC-210

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RLS vs Roles and Visibility

- Custom Roles restrict access by environments and applications, but Row Level Security provides the most control over content
- Report Visibility by roles is easier to implement but requires customizing reports and doesn't give the admin control over specific data items.
- Tailor CT reporting to work for all levels of the organization and use RLS to ensure data is filtered appropriately within each report for each user
- If needed, RLS allows for the creation of “admin” users that can view everything without restriction
- If you have a report that drills thru to lower levels of the model. RLS only works on the top object.
- Reports can be locked down within CT by roles, allowing admins to restrict access to unfinished reports, while allowing access to those that are completed and ready to be leveraged by users

Questions?



Surveys

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



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- Course **Description**
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- 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!
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