

Bronze Sponsor



What's New in Apptio for 2024

Your Guides:
Eric Chan & Daniel Cunningham

Agenda

- Introduction
- Checking Your Apptio Version
- Helpful Features in 2024
- Demo and Walkthrough
- Questions

Introductions

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



Discussion

- What new features in the past year have been game-changing for you?
- What new features do you have questions about?
- What new features were not as great as you thought they would be?

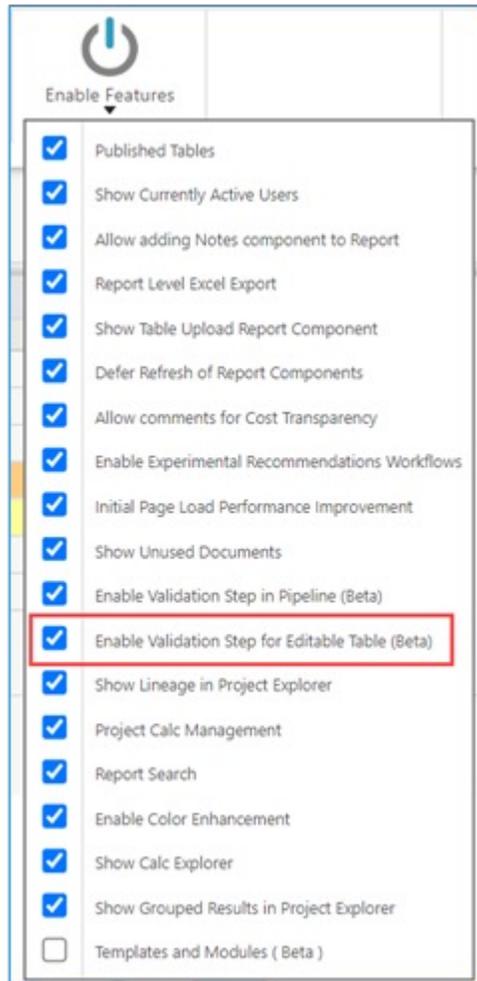
Checking Your Apptio Version

✔ Release information for IBM Apptio Costing & Planning
<https://help.apptio.com/en-us/studio/whats-new.htm>

- Server Version 12.11.12
- Client Version 2.12.0
- Content Version 110



Editable Tables – Data Validation



Editable Table ⚠ You must fix validation errors in table before you will be able to save

Time Grouping	Bill Name	Invoice Type	Displayed Sections
	Add more data here	22	
	IBM	44	
	Google	66	
	Next		
	Step	88	

Validation Error
Required value: Cell cannot be empty

Editable Table ⚠ You must fix validation errors in table before you will be able to save data edits

Cost Center	CopyTable	CSM Status	Published	Finance Status
CC-123	Trial	Allow/123	No	Pending
11111	No	Not Submitted	Check	Pending
CC-345	FGV-777	12	No	Pending
FS##	No	Not Submitted	No	Done

Validation Error
The value does not meet the cell's data validation rules- Finance Status = [Completed]

- Data Validation has been made optional for Editable Tables to help prevent the upload of corrupt or incorrect data
- Warnings and Error messages will display as data is entered. Data that fails validation will highlight cells in red that can be hovered over to provide explanations
- This can be enabled via the Projects tab (in Studio) under the 'Enable Features' option (screenshot to the far left)

Editable Tables – Slicers across tables

APPTIO an IBM Company

FY2022 Volume Plan

Report filtered on:

Instructions Annual Plan Q3 Forecast

FY2022 Annual Plan Status: Not Approved

Report filtered on: "Accounting", "Cool Gadgets"

Service Type: No Filter Applied

Service Category: No Filter Applied

Organization Name: Accounting, Cool Gadgets

Organization	Organization Name	Service ID	Service Offering	Unit of Measure	Baseline Quantity	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Comment
BU_ID_11	Accounting	BAS-15	Accounts payable	User Accounts	6	6	6	6	6	6	6	20	20	20	20	20	20	Reduced to 20 for Jul - Dec bar upon approver feedback
BU_ID_11	Accounting	EUS-04	Commercial Printers	Device	3	2	2	2	2	2	2	2	2	2	2	2	2	Reduced by 1 for the year
BU_ID_11	Accounting	TS-16	Field Support	HR	1,164	1,164	1,164	1,164	1,164	1,164	1,164	1,164	1,164	1,164	1,164	1,164	1,164	
BU_ID_11	Accounting	BAS-22	Financial planning & analysis	User Accounts	6	8	8	8	8	8	8	8	8	8	8	8	8	XYZ
BU_ID_11	Accounting	EUS-01	Fixed Workspace	Device	36	36	36	36	36	36	36	36	36	36	36	36	36	
BU_ID_11	Accounting	BAS-24	General Accounting	Device	7	9	9	9	9	9	9	9	9	9	9	9	9	XYZ
BU_ID_11	Accounting	TS-13	IT Finance	Device	1,176	1,176	1,176	1,176	1,176	1,176	1,176	1,176	1,176	1,176	1,176	1,176	1,176	
BU_ID_11	Accounting	TS-10	IT Management	Device	1,176	1,176	1,176	1,176	1,176	1,176	1,176	1,176	1,176	1,176	1,176	1,176	1,176	
BU_ID_11	Accounting	TS-12	IT Strategy & Planning	Device	1,176	1,176	1,176	1,176	1,176	1,176	1,176	1,176	1,176	1,176	1,176	1,176	1,176	
BU_ID_11	Accounting	EUS-02	Mobile Workspace	Device	7	7	7	7	7	7	7	10	10	10	10	10	10	XYZ
BU_ID_11	Accounting	EUS-09	Office Automation	User	1,078	1,078	1,078	1,078	1,078	1,078	2,000	2,000	2,000	4,000	2,000	2,000	2,000	update to 2000 beginning in J.
BU_ID_11	Accounting	BAS-14.1	Order Management (Oracle CRM)	User Accounts	7	7	7	7	7	7	7	9	9	9	9	9	9	XYZ
BU_ID_11	Accounting	TS-09	Records Management	Space R3/mo	1,200	1,200	1,200	1,200	1,200	1,200	1,200	1,200	1,200	1,200	1,200	1,200	1,200	
BU_ID_11	Accounting	TS-18	Risk Management	HR	1,224	1,224	1,224	1,224	1,224	1,224	1,224	1,224	1,224	1,224	1,224	1,224	1,224	
BU_ID_11	Accounting	TS-15	Service Desk	Ticket	1,176	1,176	1,176	1,176	1,176	1,176	1,176	1,176	1,176	1,176	1,176	1,176	1,176	
BU_ID_11	Accounting	EUS-10.1	Telephone Calls	Minutes	14,035	10,000	10,000	10,000	10,000	10,000	10,000	10,000	10,000	10,000	10,000	10,000	10,000	Reduce by ~30% for the year
BU_ID_11	Accounting	BAS-28	Treasury	User Accounts	6	6	6	6	6	6	6	8	8	8	8	8	8	XYZ
BU_ID_11	Accounting	TS-04	Virtual Compute &	Instance	1,144	1,144	1,144	1,144	1,144	1,144	1,144	1,144	1,144	1,144	1,144	1,144	1,144	

Annual Plan Approval Status

Organization Name	Submitter	Submission Status	Submission Comment	Approver	Approval Status	Approval Feedback
Accounting	Shelby Moore	Submitted	Second submission	Gus Galeano	Pending	Initial Rejection
Cool Gadgets	Bryant Warner	Not Started		Deimy Salas	Pending	

Adding Row Download Upload Publish

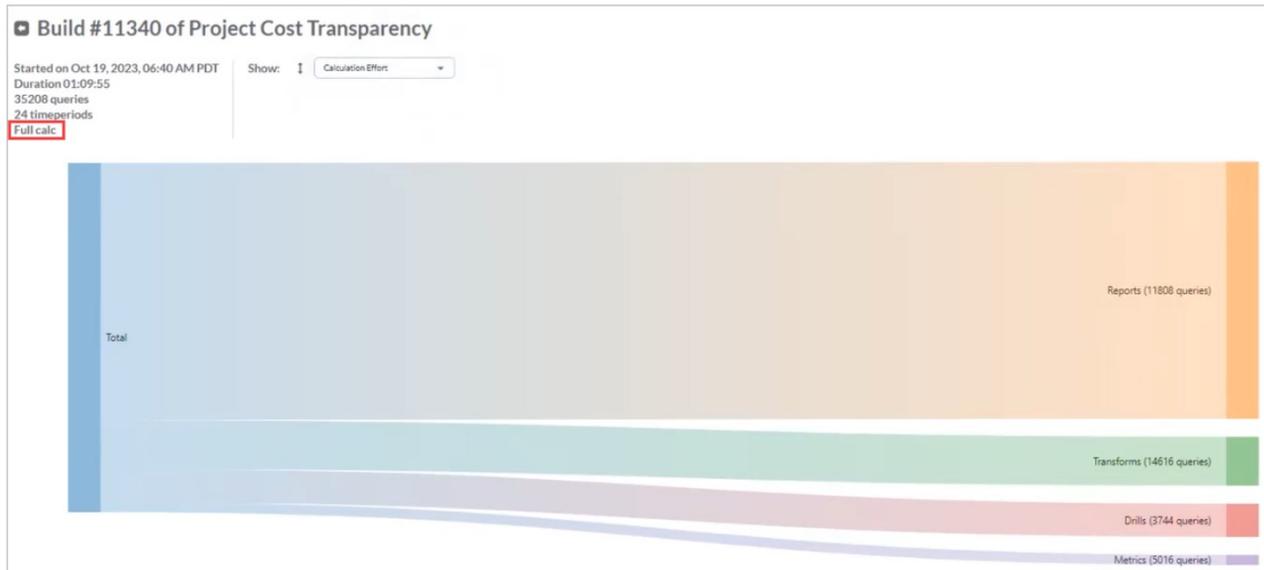
Save Cancel

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Selecting two options in the Organization Name slicer, filters both the Volume Plan editable table (top) and the Plan Status editable table (bottom).

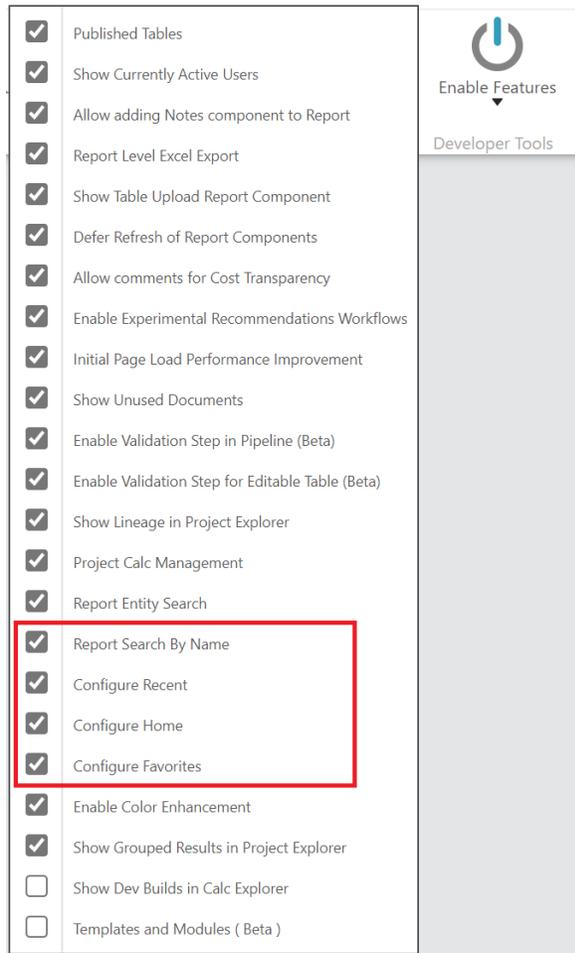
- Slicers can be used across multiple editable tables
- Can even apply to report tables that are built off of different editable tables (so long as they have the same column name)
- Slicers that are in Groups will only apply to tables also within that same group

Calc Explorer



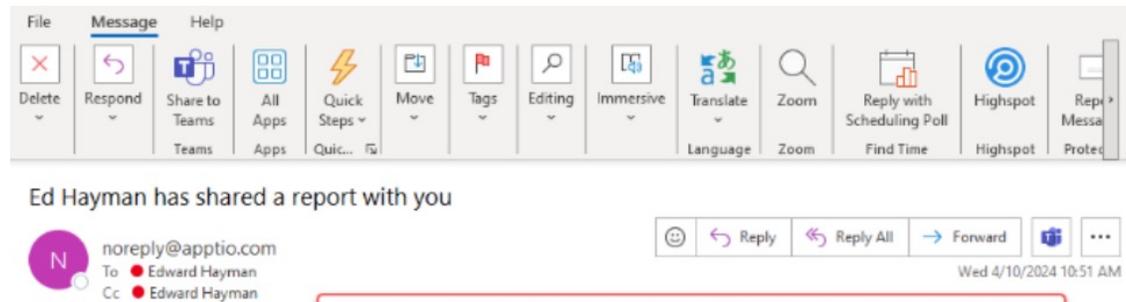
- Gives Admins ability to review recent builds and drill in to understand what makes up their calculations and what is responsible for the largest calculation effort.

Enhanced Navigation



- More modernized and simplified end user report navigation experience. This includes:
 - Marking Favorite reports
 - A list of “recent” reports
 - Report Search function (report name)
 - Preferred Landing Page
- Can be turned on in TBM Studio, under the Project tab > ‘Enable Features’

Email with Simplified Link



The email is much cleaner than the previous release that showed a multi-line URL. Clicking on the link will take the user to the report with the sender's report context.

Ed Hayman has sent you an Apptio report. You can view the report at the following link. You must be logged in to view it.

[Solution Offerings](#)

Comment from Ed Hayman :

Why do we have the spike in SAP Financial Accounting costs in Aug FY2023?

Thank you for using Apptio.

- When sharing a report through e-mail, the message will display a context-specific URL
- Previously, the message contained a lengthy, multi-line URL

Editable Tables – Hourly option for recurring publish

Recurring Updates for Editable Tables ×

Recurrence:

Repeat: every hour(s)

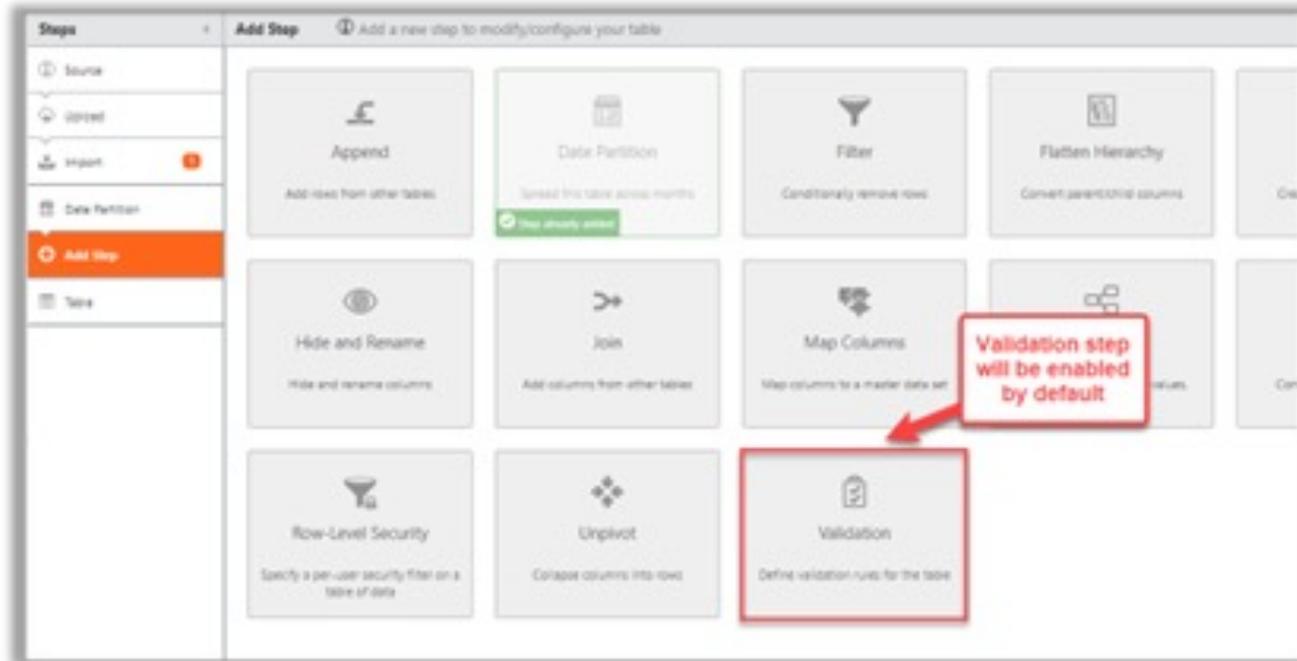
Start time: UTC/GMT:

Enable

**New Hourly Option
Simplifies the Schedule**

- There is now a new “Hourly” publishing schedule option for editable tables.
- Previously, if this was required, an Admin would have to set up as many daily publishes as needed to support the process (i.e. 8 separate publish tasks for a standard work day where the requirement is to publish every hour).

Validation Step in Pipeline



- The Validation step is now available by default when adding a table step in TBM Studio
- Admins can opt out of this by navigating to Project > Enable Features tab on the tool bar and unchecking the 'Enable Validation Step in Pipeline' checkbox

Editable Tables – Data Validation for “Intersects table”

The screenshot shows the APPTIO interface with the 'Validation' tab active. A red box highlights the validation rule configuration:

- 1. Column Name - to be validated
- 2. Intersects Table:Column rule
- 3. Table Name:Column Name for the validation table (e.g., Locations:Location)

Another red box points to the 'Validation' step in the 'Steps' pane, stating: "The current table does not have any data validation errors".

The main table, 'Cost Center Owner Maintenance', displays data with two rows highlighted in red, indicating validation errors. A red box points to the error icon in the bottom right corner of the table, stating: "After updating another row with an invalid city and saving, the two rows sort to the top. The Error icon in the bottom of the table shows Total validation errors: 2".

Cost Center	Cost Center Name	Cost Center Owner	Location	Age
CC-200	Apps - Back Office	Lianne Bordin	Atlanta	45
CC-370	Security & Risk Mgmt	Sam Severson	Portland	47
CC-220	Apps - Sales & Ops	Tambra Assael	Seattle	42
CC-320	Data Center O		Seattle	59
CC-330	Network Serv		London	37
CC-335	Voice and Call		London	49
CC-340	Enterprise Com		San Francisco	37
CC-345	Operations Ce		San Francisco	42
CC-350	Service Desk		Seattle	32
CC-360	Field Support -		San Francisco	28
CC-365	Field Support		London	31
CC-210	Apps - Mfg & Dist	Marry Tynio	Seattle	38
CC-390	Office of the CIO	Clara Klein	Seattle	51
CC-395	Program Office	Paula Plotz	London	29

- If you enter data that does not appear in the validation table selected, the cell will turn red and hovering your cursor over the cell will display an error message.
- Changes can still be saved, but the error indicators will still show and rows that contain errors will appear at the top of the table.

E-mail Report Enhancements

After logging in, the first report open is the one from the email. The interactive selections from the sender are set including the Date Range the report was sent from.

Message indicating the time was changed from the Default Time Period to October FY2020

Project date has been changed from June FY2019 to October FY2020

Ed Hayman has shared a report with you - Message (HTML)

Ed Hayman has sent you an Apptio report. You can view the report at the following link. You must be logged in to view it.
[App Review](#)
 Comment from Ed Hayman : Warning: Unsupported html elements or hyperlinks have been found and removed from original comment due to security concerns.
What is going on with the Raw Materials Inventory spend? We had been reducing it over the past year and it is spiked up in October? Why?

Thank you for using Apptio.

Italicized text helps differentiate the sender's email message from the system message.

- When sharing a report via e-mail, the URL for the report, the comments made by the sender will be in *Italics* and the report link will never expire
- Additionally, any filter, slicer, picker and date range selections will be applied for the recipient upon opening the link

Editable Tables – Checkbox selection advanced capabilities

- The checkbox is now able to be incorporated into ApptioScript for bulk actions
- An admin can create button specific scripts so that an End User can check the rows they want to apply an change to, and then click the button to execute the script

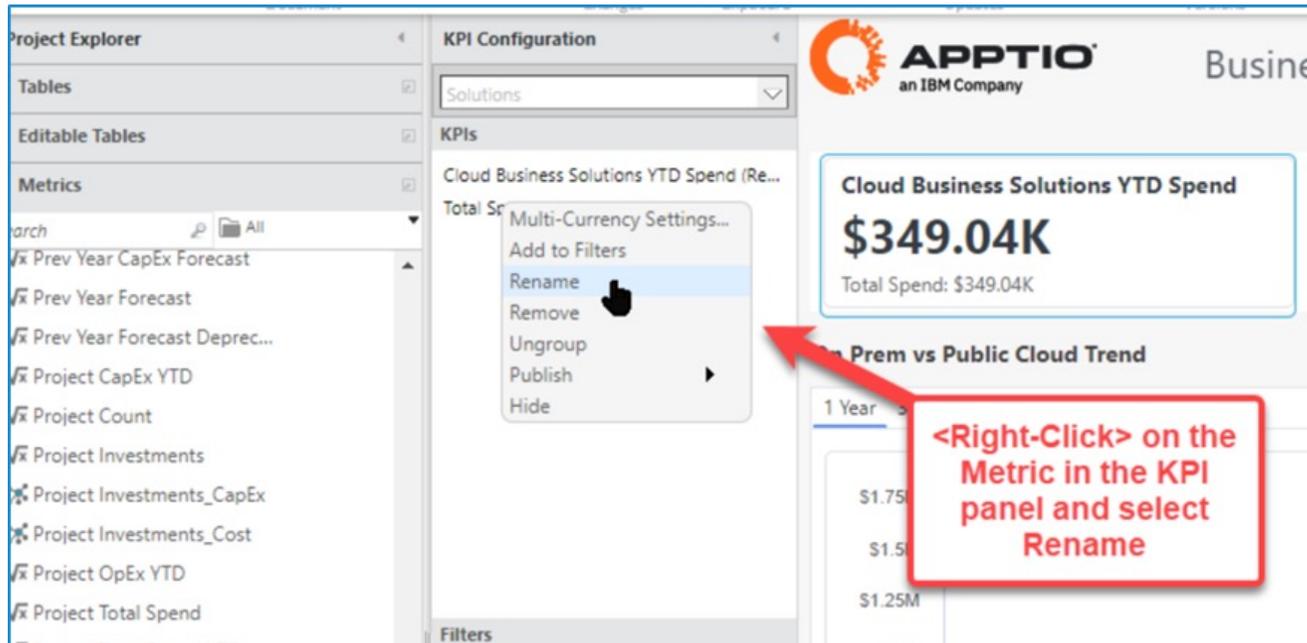
The screenshots illustrate the process of selecting rows for approval in the APPTIO system. The table columns include Organization Name, Submitter, Submission Status, Submission Comment, Approver, Approval Status, Approval Feedback, Status Comment, Edited By, and Edit Date.

Top Screenshot: Shows the table with several rows highlighted in yellow. A red callout box points to these rows with the text: "Highlighted rows have been submitted and are awaiting my approval".

Middle Screenshot: Shows the same table with checkboxes selected for the highlighted rows. A red callout box points to the checkboxes with the text: "Using the check box, I have selected 2 of the 4 to approve". Below the table, a red callout box points to the "Approve My Plans (Formulas)" button with the text: "Clicking on the Approve My Plans button, the script will only take action on those with the check box selection".

Bottom Screenshot: Shows the table after the approval process. The two selected rows now have an "Approved" status. A red callout box points to these rows with the text: "Only the two selected rows have been approved". Below the table, a red callout box points to the "Approve My Plans (Formulas)" button.

Rename KPI Labels



- Users with access to Studio and ability to modify reports can create a KPI with a metric and then rename it to something more preferable
- Once the metric has been pulled into the configuration panel, right-click, select the 'Rename' option and then enter the new name and save it. This cannot be done with perspectives
- This feature is a Beta feature and needs to be enabled in the Project > Enable Features section of the tool bar

Published Tables

The screenshot displays the Apptio Project Explorer interface. The top section shows the 'Ad Hoc Component Configuration' for 'Jan FY2019'. A table lists various applications with columns for Application Name, Application Family, App Dev, App Run, and App Total. A red box highlights a row for 'eGain Customer email system' with the label 'Configured example'. A red arrow points from this row to the 'Published Tables' section below. The 'Published Tables' section shows a table with columns for Cost Center, Account Group, OpEx, Budget, Budget Variance, and % Budget Variance. A red box highlights a row for 'Enterprise Compute & Storage (EC-000)' with the label 'New Published Table created from the report table. Configuration changes can be made to optimize for an external egress data set'.

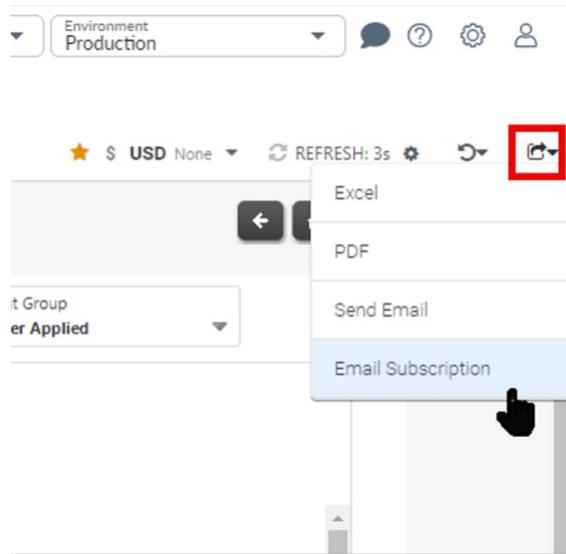
Application Name	Application Family	App Dev	App Run	App Total
eGain Customer email system	Sales & Marketing	\$0	\$8,486	\$8,486
eForm Local Access Maintenance	Security & Compliance	\$7,838	\$7,838	\$7,838
eForm IAA Business Process	Security & Compliance	\$0	\$3,819	\$3,819
Wavepad Sound editing software for windows	Communication & Collaboration	\$0	\$334	\$334
Visual Rescan Software	Communication & Collaboration	\$0	\$500	\$500
VMware Infrastructure	Infrastructure Apps	\$0	\$10,185	\$10,185
Utility Manager	Infrastructure Apps	\$0	\$358	\$358
Troux Enterprise	Infrastructure Apps	\$88,190	\$6,775	\$94,965
Tool for Oracle	Infrastructure Apps	\$0	\$455	\$455
Telecom Alarm (TAM)	Infrastructure Apps	\$0	\$10,143	\$10,143
Team Foundation Server	Delivery Apps	\$317,542	\$28,856	\$346,398
Splunk Log Analytics	Infrastructure Apps	\$0	\$11,765	\$11,765
Security Access Control	Security & Compliance	\$0	\$8,399	\$8,399
Sales Pipeline Management System	Sales & Marketing	\$0	\$19,173	\$19,173
SQL Server Reporting Services	Development Apps	\$0	\$3,609	\$3,609
SOX SharePoint	Security & Compliance	\$0	\$3,479	\$3,479
SAP Sales & Distribution	Sales & Marketing	\$0	\$9,747	\$9,747

Cost Center + Name	Account Group	OpEx +	Budget	Budget Variance	% Budget Variance
Enterprise Compute & Storage (EC-000)	Technology	\$811,871	\$868,000	-\$56,129	-6.5%
Voice and Call Center (CC-000)	Technology	\$493,713	\$233,750	\$259,963	111.2%
Public Support - NA (CC-000)	Technology	\$28,280	\$21,300	\$6,980	32.8%
Voice and Call Center (CC-000)	Telecom	\$233,634	\$240,300	-\$6,666	-2.8%
Office of the CIO (CC-000)	Salaries & Benefits	\$174,208	\$174,967	-\$759	-0.4%
Class Center Ops (CC-000)	Facility & Office Access	\$173,314	\$167,400	\$5,914	3.5%
Appx - Utility & Oper (CC-000)	Salaries & Benefits	\$168,882	\$167,200	\$1,682	1.0%
Appx - Utility & Oper (CC-000)	Telecom	\$141,331	\$127,988	\$13,343	10.4%
Appx - Sales & Op	Salaries & Benefits	\$129,394	\$123,000	\$6,394	5.2%
Appx - Sales & Op (CC-000)	Salaries & Benefits	\$128,294	\$122,667	\$5,627	4.6%
Enterprise Compute & Storage (EC-000)	Salaries & Benefits	\$118,887	\$118,000	\$887	0.7%
Appx - Bank Office (CC-000)	Salaries & Benefits	\$108,360	\$108,667	-\$307	-0.3%
Appx - Sales & Op (CC-000)	Salaries & Benefits	\$100,804	\$100,000	\$804	0.8%
Appx - Bank Office (CC-000)	Salaries & Benefits	\$88,763	\$84,200	\$4,563	5.4%
Enterprise Compute & Storage (EC-000)	Outside Services	\$83,813	\$100,000	-\$16,187	-16.2%
Appx - Sales & Op (CC-000)	Contract Labor	\$71,622	\$72,000	-\$378	-0.5%
Network Services (CC-000)	Technology	\$62,978	\$48,000	\$14,978	31.2%
Appx - Sales & Op (CC-000)	Consulting	\$61,375	\$0	\$61,375	>100%

- Published Tables can be used to export data from Apptio to another Apptio project or 3rd party system
- Some advantages are:
 - No need to manage report permissions
 - Create table the same way you would a report table
 - Export upon Dev calc completion
- Previously a report table had to be created to provide the necessary link

Email Subscriptions for Standard Reports

- Streamlines the process of managing and distributing report to users via scheduled email notifications
- Admins can sign up from the View mode under the Export icon and Select Email Subscription



Email Subscriptions

Use subscriptions to email reports to yourself on a regular interval. You can also email invitation to others to subscribe at the frequency you define. Send time is defaulted to your current time zone.

Report collection*

IT Financials

Report*

Budget Variance Analysis

Subscription name*

IT Financials: Budget Variance Analy

Recipients*

ehayman@apptio.com skurani@apptio.com

Frequency

Daily Weekly Monthly

Send Time* 11:00am PST Day* 10

Subscription Ends

Never On a Date

Manage Subscriptions
Cancel
Subscribe

Manage Subscriptions

View by user

Subscription Name	Occurrence	
<input type="checkbox"/> [Empty]	[Empty]	
<input type="checkbox"/> Bill of IT Home:Bill of IT	At 05:00 PM every day GMT-07:00 with no end date	Edit Subscription
<input type="checkbox"/> Benchmarking:Infrastructure Summary	At 05:30 PM every day GMT-07:00 with no end date	Edit Subscription
<input type="checkbox"/> Billing Data Quality: Configuration Summary	At 11:30 AM every day GMT+05:30 with no end date	Edit Subscription
<input type="checkbox"/> IT Financials: Financial Analysis	At 12:30 PM every day GMT-07:00 with no end date	Edit Subscription
<input type="checkbox"/> IT Financials: Cost Pool Analysis	At 12:30 PM every day GMT-07:00 with no end date	Edit Subscription

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Enhanced Navigation – User Impersonation/Deleted Reports

- Admins can impersonate users to enhance admin capabilities by customizing navigation settings to align with user preferences and roles within the platform
- Allows pre-configuration of landing pages and favorite reports for stakeholders
- A user will also be notified if a landing page/favorite report has been deleted or removed from their permissions

The image consists of two screenshots from a software application interface.

The left screenshot shows a user profile menu in the top right corner. The menu is open, displaying options: "User Account", "Impersonate", "My Preferences", and "Logout". A hand cursor is pointing at the "Impersonate" option. Below this, a modal window titled "Impersonate" is shown. It prompts the user to "Enter the username of the account to impersonate" and features a text input field with the username "jdoe@apptio.com" and a "Next" button.

The right screenshot shows a dashboard with a "Total Spend YTD" of "\$15.47M". A red arrow points from the gear icon in the top right corner of the dashboard to a configuration menu. A red box highlights the "Configure Favorites via Gear icon" text, and another red arrow points from this box to the "Configure landing page/Favorites" option in the configuration menu, which is highlighted in yellow.

Perspective Details

- Perspectives now display additional details for text, numeric, or modeled value types
- Previously this was only available for formulaic perspectives

The screenshot displays the Microsoft Dynamics 365 Finance and Operations user interface. The top navigation bar includes 'Home', 'Project', and 'Build' tabs. The 'Project Explorer' pane on the left shows a tree view of perspectives, with 'Amount' selected. The main area shows the 'Dimension properties' pane for the 'Amount' perspective. The 'Text/Numeric/Modeled Value' dropdown is set to 'Cost Source Master Data.Amount'. A red arrow points to this dropdown, and a red box contains the text: 'Client 2.7 Now, the table name and column is displayed if the perspective was text, numeric, or modeled value type'.

Trailing 12 Month Time Aggregation

- Allows calculating previous 12 months of data with new time option
- Includes option for trailing 13 months for a 13-period fiscal calendar
- *If fewer periods are available, the system will automatically annualize the amount

Project Explorer

Tables

Editable Tables

Metrics

Perspectives

Published Tables

Reports

Time

search

Months (Yr)

Quarters (Yr)

Halves (Yr)

Years (-1,1)

Year To Date

Quarter To Date

Annual

Trailing Twelve Months

Months Year To Date

Months Remaining Inclusive

Months Remaining Exclusive

Ad Hoc Component Configuration

Cost Source

Rows

Cost Pool

Values

Cost

Columns

Year To Date

Annual

Trailing Twelve Months

Filters

Cost Pool

Update Results Immediately

APPTIO
an IBM Company

Cost Pool	Year To Date	Annual	Trailing Twelve Months
Outside Services	\$7,993,040	\$17,813,872	\$17,813,872
Internal Labor	\$5,873,401	\$11,753,531	\$11,753,531
Hardware	\$4,137,213	\$7,993,941	\$7,993,941
Software	\$3,139,125	\$6,791,554	\$6,791,554
Telecom	\$2,269,626	\$4,505,348	\$4,505,348
External Labor	\$1,970,726	\$3,950,759	\$3,950,759
Facilities & Power	\$1,026,088	\$2,076,260	\$2,076,260
Other	\$39,132	\$80,781	\$80,781
Total	\$26,448,351	\$54,966,045	\$54,966,045

New Trailing Twelve Month feature.

NOTE: The reference project data carries forward for each month so the TTM matches the annual amount.

Editable Table Updates – Show Deleted Rows

- Users can view rows in editable tables that are no longer active and show who deleted them
- To view, right-click on the editable table and select ‘Show Changes for Row’ or ‘Show Changes’
 - ‘Valid Till’ column is added to row history to identify any rows with dates before ‘December 31, 9999’ have been deleted

Valid Till column shows how long the row will be displayed in the table. If the date is before December 31, 9999, then it was deleted.

Username	Edit Date	Valid Till	Oct	Apr	May	Service ID	Application ID	Project ID	Unit of Measure	Aug	Baseline Quantity	O Liai
cjain@apptio...	March 7, 2024 7:01:03 AM PST	December 31, 9999 3:59:59 PM PST	47	47	47	TS-14			Hr	47	47	
cjain@apptio...	March 7, 2024 7:01:03 AM PST	December 31, 9999 3:59:59 PM PST	46	46	46	TS-11			Hr	46	46	
cjain@apptio...	March 7, 2024 7:01:03 AM PST	December 31, 9999 3:59:59 PM PST	46	46	46	TS-08			Hr	46	46	
cjain@apptio...	March 7, 2024 7:01:03 AM PST	December 31, 9999 3:59:59 PM PST	44	44	44	TS-02			Hr	44	44	
cjain@apptio...	March 7, 2024 7:01:03 AM PST	December 31, 9999 3:59:59 PM PST	43	43	43	EUS-11			Port	43	43	
cjain@apptio...	March 7, 2024 7:01:03 AM PST	December 31, 9999 3:59:59 PM PST	47	47	47	EUS-08			Account	47	47	
cjain@apptio...	March 7, 2024 7:01:03 AM PST	December 31, 9999 3:59:59 PM PST	46	46	46	EUS-05			Device	46	46	
cjain@apptio...	March 7, 2024 7:01:03 AM PST	December 31, 9999 3:59:59 PM PST	408	408	408	TS-23			Instance	408	408	
cjain@apptio...	March 7, 2024 7:01:03 AM PST	December 31, 9999 3:59:59 PM PST	388	388	388	TS-20			User	388	388	
cjain@apptio...	March 7, 2024 7:01:03 AM PST	December 31, 9999 3:59:59 PM PST	372	372	372	TS-17			Hr	372	372	

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Editable Table Updates – Possible Values Data Validation

- Enhanced data validation process by including analysis of possible values
- Values that are not part of the possible values will be show as errors in red, and moved to the top of the table for correction

The image shows two screenshots from the APPTIO interface. The left screenshot shows the 'Configure Columns' dialog for an 'Editable Table'. The 'Location' column is selected, and its 'Possible Values' are set to '%.EditableTable:Locations/!LIMIT_COLUMNS[Location]'. A red box highlights this configuration with the text: 'Editable Table configured with Possible Values for the Location column'. The right screenshot shows a table titled 'Center Owner Maintenance' with columns for Cost Center, Cost Center Name, Cost Center Owner, Location, and Age. Two rows with 'Chicago' in the Location column are highlighted in red, indicating data validation errors. A red box points to these rows with the text: 'The two rows with Chicago selected have been flagged as a data validation error based upon the Possible Values rule. The error rows are sorted to the top to easily identify and fix.'

Cost Center	Cost Center Name	Cost Center Owner	Location	Age
390	Office of the CIO	Ciara Klein	Chicago	51
370	Security & Risk Mgmt	Sam Severson	Chicago	47
220	Apps - Sales & Ops	Tambra Assael	Seattle	42
320			Seattle	59
330			London	37
335			London	49
340			San Francisco	37
345			San Francisco	42
350			Seattle	32
360			San Francisco	28
365	Field Support - EMEA	Jamiey Marrington	London	31
210	Apps - Mfg & Dist	Marry Tynio	Seattle	38
200	Apps - Back Office	Lianne Bordin	Seattle	35
395	Program Office	Paula Plotz	London	29

Recurring Publish Enhancements – Additional Columns

- 'Run Now' column has been added to the view to allow admins to run schedules instantly instead of scheduling a time
- 'Description' column has been added to allow meaningful descriptions for each schedule

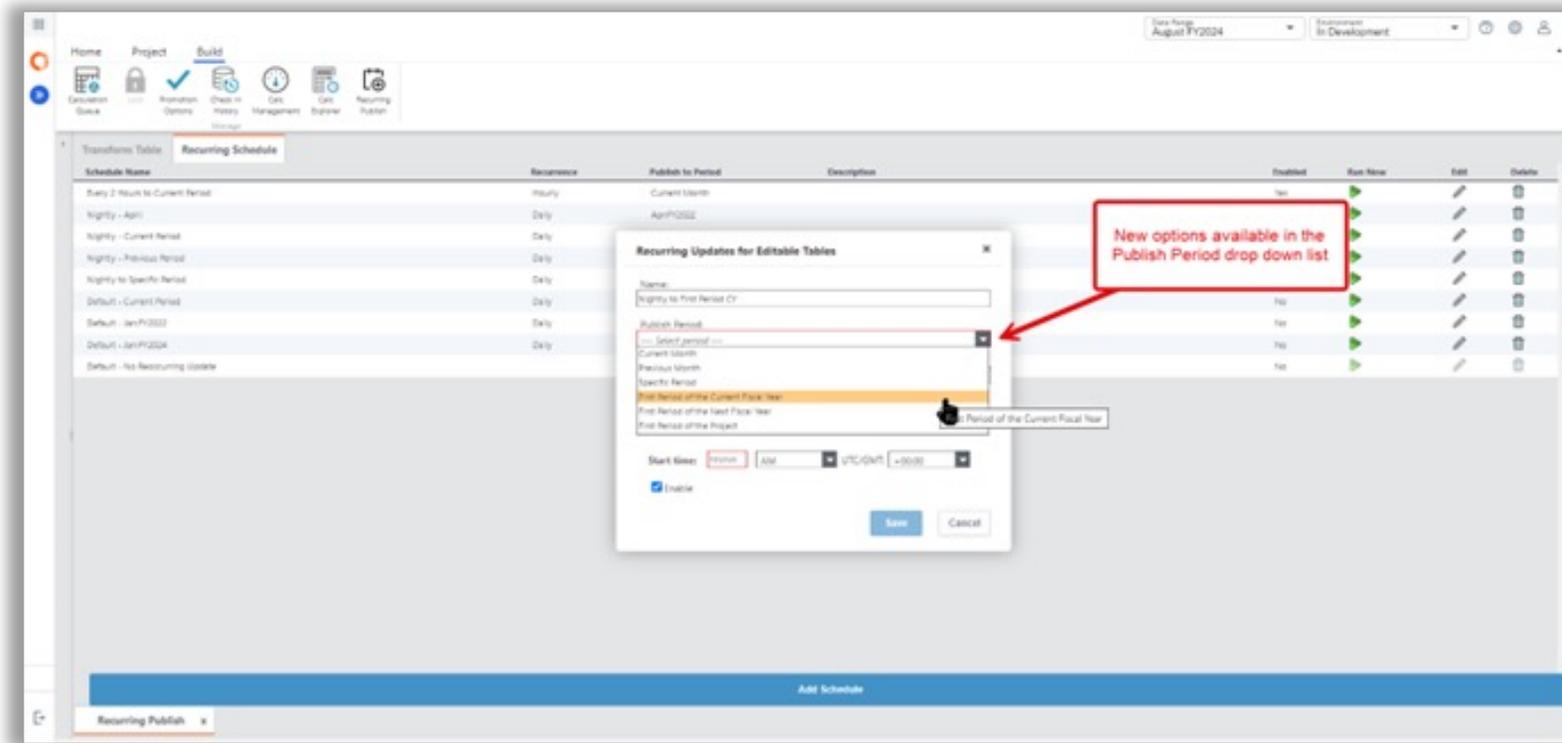
The screenshot shows a table with the following columns: Schedule Name, Recurrence, Publish to Period, Description, Enabled, Run Now, Edit, and Delete. The 'Run Now' column contains green play button icons for each row. A red box highlights the 'Run Now' column, and a red callout box points to it with the text: "New 'Run Now' column will publish all tables assigned to the schedule".

Schedule Name	Recurrence	Publish to Period	Description	Enabled	Run Now	Edit	Delete
Every 2 Hours to Current Period	Hourly	Current Month		Yes	▶	✎	🗑️
Nightly - April	Daily	April 2022		Yes	▶	✎	🗑️
Nightly - Current Period	Daily	Current Month		Yes	▶	✎	🗑️
Nightly - Previous Period	Daily	Previous Month		Yes	▶	✎	🗑️
Nightly to First Period CY	Daily	First Period of the Current Fiscal Year	Publish editable tables after business hours to lan	Yes	▶	✎	🗑️
Nightly to Specific Period	Daily	Jul FY2022		No	▶	✎	🗑️
Default - Current Period	Daily	Current Month		No	▶	✎	🗑️
Default - Jan FY2022	Daily	Jan FY2022		No	▶	✎	🗑️
Default - Jan FY2024	Daily	Jan FY2024		No	▶	✎	🗑️
Default - No Recurring Update		No Recurring Update		No	▶	✎	🗑️

The screenshot shows the same table as above, but with a dialog box open. The dialog box is titled "Run Now Schedule" and contains the text: "Are you sure to run the Schedule: 'Nightly to First Period CY' now?". There are "Yes" and "No" buttons at the bottom. A red callout box points to the dialog with the text: "Confirmation to proceed with the publish for the schedule".

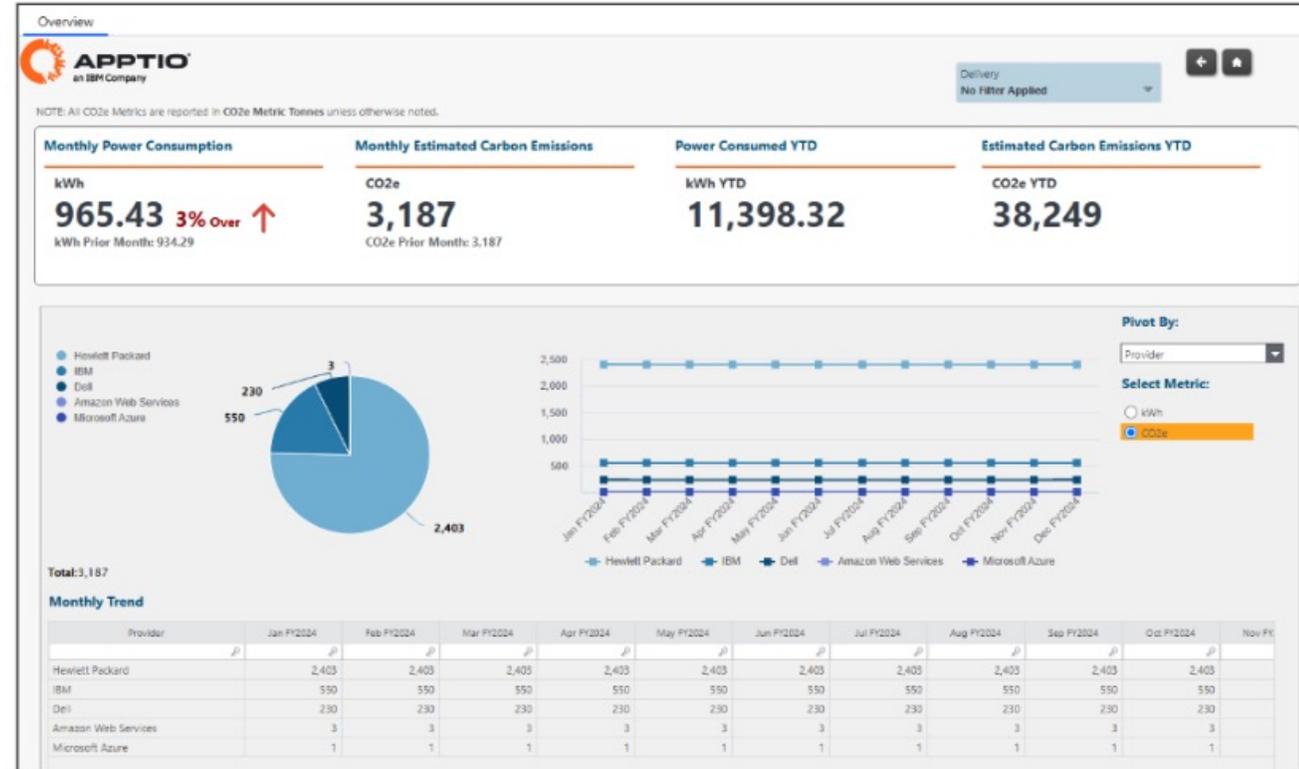
Recurring Publish Enhancements – Added Publish to Period Options

- 3 options have been added to the Publish Period selector
 - First Period of the Current Fiscal Year
 - First Period of the Next Fiscal Year
 - First Period of the Project



Technology Emission Management (TEM)

- Based on Cloudability and Costing data, provide a view measuring IT carbon emissions.



Email Subscriptions

- Ability to set subscription frequency
- Defaulting time period of reports generated

Email Subscriptions

Use subscriptions to email content to yourself on a regular interval. You can also email an invitation for others to subscribe at the frequency you define.

Report Collection *
IT Financials

Report *
Financial Analysis

Subscription Name *
IT Financials: Financial Analysis

Define email body ✔

Include PDF in attachment

If a simple view is available for this report that will be sent as the PDF attachment. Simple views can be setup in TBM studio.

eric.chan@regoconsulting.com

Reporting Period
 Current Period Previous Period Default Period

With Filters i

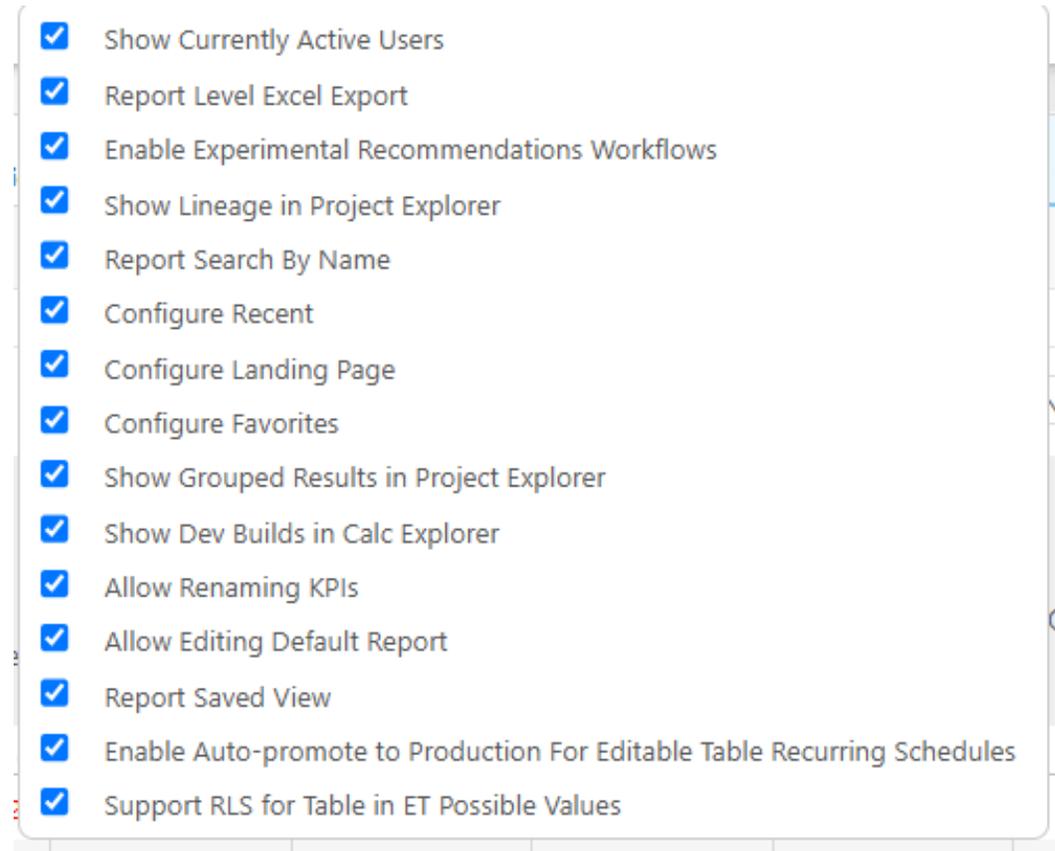
Frequency
 Daily Weekly Monthly

Send Time *
AKST Day *

[Manage Subscriptions](#) Cancel Subscribe

Auto Promote Re-Occurring Editable Table Updates to Production

- Allow auto promotions to reduce amount of automation set up for re-occurring updates in editable tables



Auto Promote Re-Occurring Editable Table Updates to Production (Continued)

Recurring Updates for Editable Tables ×

Name: CC Owner Mapping Update

Publish Period: Specific Period
Jan FY2023

Description: Monthly CC Owner mapping update.

Recurrence:

Repeat: Monthly every 1 month(s)

Repeat on: Day 10

Start time: 12:00 AM UTC/GMT: -05:00

[Add new Start time](#)

Enable
 Auto Promote To Production

[Save](#) [Cancel](#)

- Within Build > Reoccurring Publish
- Set Auto Promote to Production for a Reoccurring Updates rule

TBM Studio Demo

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



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Website

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