



ADM Explained: Moving Data Seamlessly Across the Apptio Platform

Your Guides:



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Agenda

- What is ADM
- Uses in the Apptio Ecosystem
- Uses for Target Process and Apptio
- Configuration Best Practices

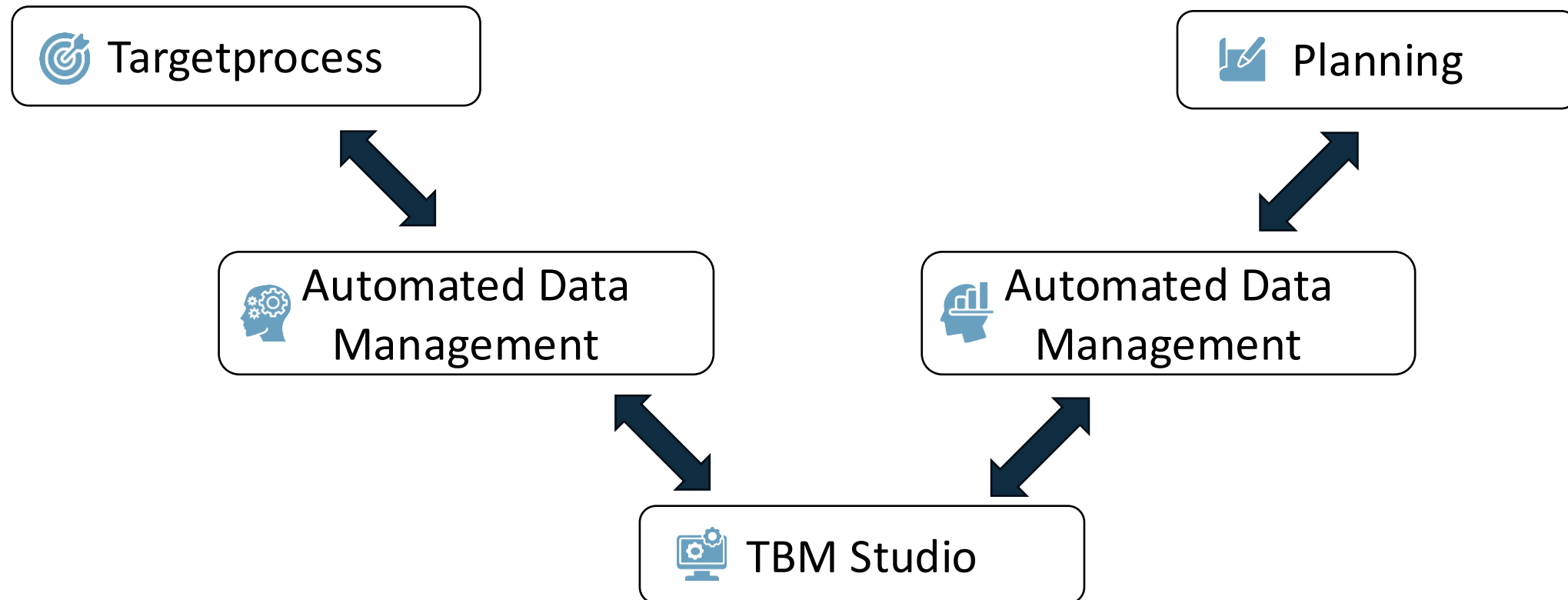
Introductions

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

What is ADM?

ADM (Automated Data Management) is a platform service designed to provide unified data sharing experiences across all Apptio applications.

ADM leverages a publish/subscribe service that enables Apptio products to share data



Applications of ADM



Financial and IT Cost Management:

- Automatically syncing IT spending data from tools like ServiceNow or ERP systems into Apptio One
- When a project is updated in one Apptio product, associated budget and cost data updates automatically across the platform



Agile and Work Management Alignment:

- Connecting Targetprocess with Apptio CT and/or Planning so that when teams update sprint assignments or capacity, financial implications are reflected in real time. This bridges the gap between delivery teams and finance
- Keeping resource allocations in sync between work management and cost reporting

Applications of ADM



Technology Business Management (TBM):

- Feeding data from cloud platforms (AWS, Azure, etc.) into Apptio's cost transparency models automatically
- Ensuring infrastructure changes are reflected in cost models automatically



Portfolio and Investment Planning:

- Keeping investment plans aligned with actual work being delivered — if a team's scope changes in a work management tool, ADM ensures the financial plan reflects that change without a manual reconciliation cycle
- Supporting rolling forecasts by automating the flow of actuals from operational systems into planning models

Applications of ADM



Reporting and Governance:

- Enabling consistent, trustworthy data across dashboards and reports
- Reducing the risk of decisions being made on stale or mismatched data across data sources

Real World Examples

> **Financial and IT Cost Management:**

- Reduce administrative overhead by sending actuals and reference data from source systems to IT Planning (ITP)
- Schedule the publishing of plan data to TBM Studio to keep reporting up to date

> **Agile and Work Management Alignment:**

- Leverage Targetprocess to allocate teams and users to work, creating a workforce plan that is sent to Apptio Planning to combine with non-labor data
- Send actual costs to Apptio Targetprocess (ATP) so leaders have up-to-date financial information for execution decisions
- Import enterprise architecture (EA) through TBM Studio into ATP so the information is available during execution

Real World Examples





Portfolio and Investment Planning:


- Send data collected from Jira to CT to compare allocations to assignment (planned vs actual team or staff)
- Send transformed ATP data to ITP Labor Activity tab


Target Process Demonstration

Configuration Best Practices

-  Ensure your environment has TBM Studio, Targetprocess, and ADM all configured within a single Frontdoor environment before beginning any integration work

-  Take an iterative approach to configuration — start with what you know, configure it, validate it, and then go back for more

-  Data Exports (ATP → Apptio)
 - Create a CSV export first to validate that the API call provides the correct data
 - Switch the export profile to ADM and provide the ADM and name
 - Targetprocess creates both the ADM Profile and TBM Studio Table

-  Data Imports (Apptio → ATP)
 - Create the table in Studio first
 - Create the ADM Profile referencing the correct Project and table
 - Finally, create the Integration Profile in Targetprocess (be sure to select Tab format)

Planning ADM Demonstration

Planning ADM Integrations

Integration	Systems	Cadence
Actuals to Spend Management	TBM Studio to Planning	Automatic
Reference Data	TBM Studio to Planning	Automatic
Publishing Plan Data	Planning to TBM Studio	Scheduled in ADM
Importing Plan Data	TBM Studio to Planning	Manual Button in Planning

Configuration Best Practices



Configure Apptio Costing Integration



All configurations will automatically be transferred to ADM when it is turned on

The screenshot shows a web application interface for configuring 'Plan Integration'. The page has a navigation bar with 'Home', 'Configure', 'Publish', 'Import', 'Export Settings', and 'Status'. The 'Configure' tab is active. The main content area is titled 'Plan Integration' and contains three input fields:

- Project Name:** A text input field containing 'ApptioOne'.
- Asset Budget Dataset:** A text input field containing 'ITPF Asset Budget'.
- Asset Forecast Dataset:** A text input field containing 'ITPF Asset Forecast'.

Configuration Best Practices



Navigate to the Company Profile and enable ADM

Data Management Enable External Code

Disable Update Reference Data Restrictions

Checking this will allow Reference Data changes that could potentially delete plan data. As a result, the system will create a copy of the plan before Update Reference Data. These plan copies will have a "Backup" suffix.

Enable Automated Data Management Integration

DO NOT check the Automated Data Management checkbox if Automated Data Management application is not provisioned in your Frontdoor environment. We are rolling it out in phases. Please contact your customer success manager, in case of any questions.

Automatically publish reference data imported from Apptio Costing

Configuration Best Practices



After ADM is turned on, update configuration is done in ADM Entity Management

APPTIO
an IBM Company

Automated Data Management

Entity Management

Environment: regoconsultingpartner.com:sandbox

Use this page to edit existing entities.

	Entity Name	Dataset Name	Project	Validation Status
	Financial Budget	ITPF Budget	regoconsultingpartner.	Valid
	Publish Financial ...	ITPF Budget	regoconsultingpartner.	Valid
	Contract Budget	ITPF Contract Bud...	regoconsultingpartner.	Validation Pending
	Publish Contract ...	ITPF Contract Bud...	regoconsultingpartner.	Validation Pending
	Contract Forecast	ITPF Contract For...	regoconsultingpartner.	Validation Pending
	Publish Contract ...	ITPF Contract For...	regoconsultingpartner.	Validation Pending
	Financial Forecast	ITPF Forecast	regoconsultingpartner.	Valid
	Publish Financial ...	ITPF Forecast	regoconsultingpartner.	Valid
	Publish Labor Acti...	ITPF Labor Activit...	regoconsultingpartner.	Validation Pending
	Publish Labor Acti...	ITPF Labor Activit...	regoconsultingpartner.	Validation Pending
	Labor Budget	ITPF Labor Budget	regoconsultingpartner.	Valid
	Publish Labor Bud...	ITPF Labor Budget	regoconsultingpartner.	Valid
	Labor Forecast	ITPF Labor Forecast	regoconsultingpartner.	Valid

regconsultingpartner.com:sandbox

Signed in as:
Rob DeLeo

Configuration Best Practices

Add Schedule

Fill Information Step 1/2

Producer*
ApptioOne Planning

Entity Configuration

Schedule Name*
Planning Test

Plan Name*
FY2026 Budget

Entities*
Publish Asset Budget, Publish Contract Budget, Publish Labor Budget, Publish LaborActi...

Select CT Period Preset*
Start of FY



Actuals and Reference Data have listeners and are automatically transferred to Planning



Plans can be scheduled to be published to TBM Studio

Add Schedule

Fill Information Step 2/2

Schedule Type
 Daily Weekly Monthly

Start Date
03/16/2026

End Date
mm/dd/yyyy

No End Date

Start Time*
6:00AM

Time Zone
Universal Time (UTC)

Configuration Best Practices



In Planning Expenses view, under the Actions button, Import from Costing



Note, this only for replace all data and cannot be external

Import From Apptio Costing...

Import type:

Replace All Data
 Update Data
 Append Data

Select this option to replace any existing data in this table.

Select Apptio Costing Period
Mar FY26

FY2026 Budget Budget: New

Expenses

Department: All Departments

Summary Labor Labor Activity Contracts Assets Cloud Other

Cloud Total **\$257.47K**

Layout: Default Layout

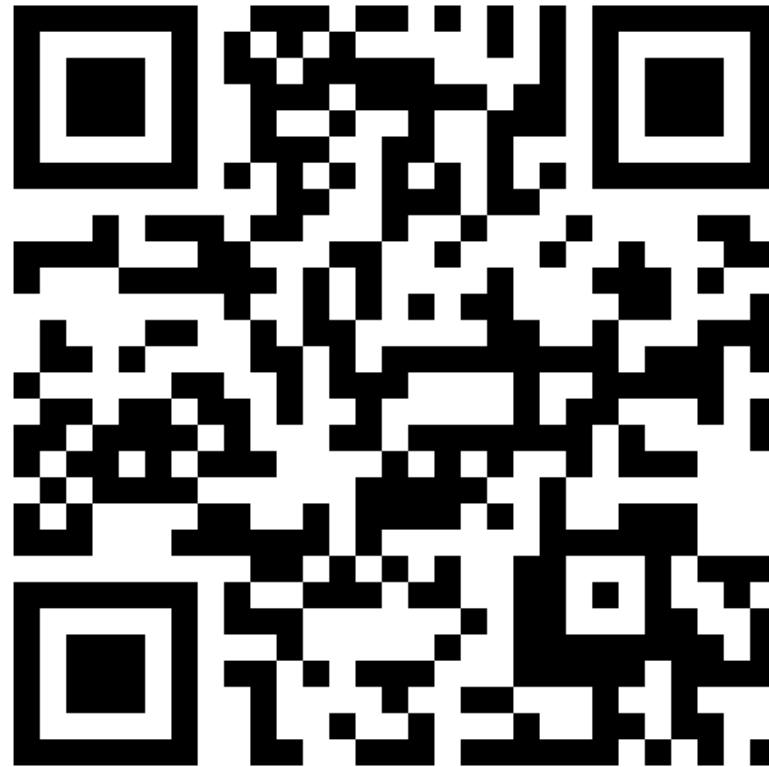
Line Item Code	Department	Account
<input type="checkbox"/> CL-1	Apps - Back	CIP Labor
<input type="checkbox"/> CL-2	Apps - Back	Message Handl

Table Level Actions

- Import cloud...
- Import from apptio costing...
- Export cloud...
- Publish cloud to apptio costing...
- Import cloudability line items
- Delete cloudability line items
- Export cloud template...

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.



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