



# Data Visibility and Access Controls in Apptio

Your Guides:



**Rob DeLeo**  
*Principal TBM Consultant*



**Chris Rhoades**  
*Senior TBM Consultant*





# 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



Are there any access or security challenges related to Apptio within 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

**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	<a href="#">Details</a>	<a href="#">AIS</a>
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.	<a href="#">Details</a>	<a href="#">Frontdoor</a>
Analyst	Yes		Can view reports and create personal reports.	<a href="#">Details</a>	<a href="#">Flagship</a>
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	<a href="#">Details</a>	<a href="#">Frontdoor</a>
BasicAgileUser	Yes		Basic Agile User	<a href="#">Details</a>	<a href="#">Vanguard</a> <a href="#">Show +1 more</a>
Budget Process Owner	Yes		Can create, open, review, and close plans.	<a href="#">Details</a>	<a href="#">SSA</a> <a href="#">Show +1 more</a>
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.	<a href="#">Details</a>	<a href="#">FiscalCalendar</a> <a href="#">Show +6 more</a>
Business Consumer	Yes		A special case of Business User that has access to Bill of IT Business User reports	<a href="#">Details</a>	<a href="#">Flagship</a>
Business Owner	Yes		Can manage the workflow in the Bill of IT application.	<a href="#">Details</a>	<a href="#">Flagship</a> <a href="#">Show +1 more</a>
Business Unit Owner	Yes		Used with the original IT Planning application, not IT Planning Foundation. Can specify	<a href="#">Details</a>	<a href="#">Flagship</a>

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 role for a starting point and edit the permissions
  - These roles can be used for visibility settings

The screenshot displays the 'Roles' management interface. On the left, a table lists various roles. On the right, a detailed view of the 'Admin' role is shown, including its properties and permissions. A 'Clone' button is highlighted in the Admin role's menu.

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 Access



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

# ITP Access

# ITP Cost Object Permissions

- Visibility is set in the Cost Object Permissions
  - Defines which users are allowed to access specific departments within a plan
  - Users can be added at multiple levels
  - Cost Object Permissions is a “live” table and updates are effective immediately

The screenshot displays the APPTIO interface for managing Cost Object Permissions. The left sidebar shows the navigation menu with 'Cost Object Permissions' highlighted. The main content area shows a table of permissions for various cost objects, including 'All Departments', 'APPS - App Dev & Support', and several other departments. The table columns include Cost Object, Owner(s), Editor(s), View Only, Can View Sensitive Columns, and Can View Sensitive Financials.

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

# 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		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
▼ APPS - App Dev & Support		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
CC-200 - Apps - Back Office		<input checked="" type="checkbox"/> cco1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> cco1	<input checked="" type="checkbox"/> cco1
CC-210 - Apps - Line of Business		<input checked="" type="checkbox"/> rob.deleo	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> rob.deleo	<input checked="" type="checkbox"/> rob.deleo
CC-220 - Apps - Sales & Ops		<input checked="" type="checkbox"/> rob.deleo	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> rob.deleo	<input checked="" type="checkbox"/> rob.deleo
▶ APPDEV - Application Development & Support		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
▶ INIT - Business-funded Initiatives		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
▶ EUS - End User Services		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
▶ I&O - Infra & Ops	rob.deleo	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> rob.deleo	<input checked="" type="checkbox"/> rob.deleo
▶ CIO - Office of the CIO		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Configuration  
Schema

Labor  
Configure what attributes define Labor.

Available Attributes

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

# IIP - Project Permissions

- Restrict Access to Projects in IIP
  - Project Managers can plan and manage all expenses for the projects they own
  - 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 shows a 'Permissions' tab. The table below lists various projects with their respective access levels.

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		

# 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](#)

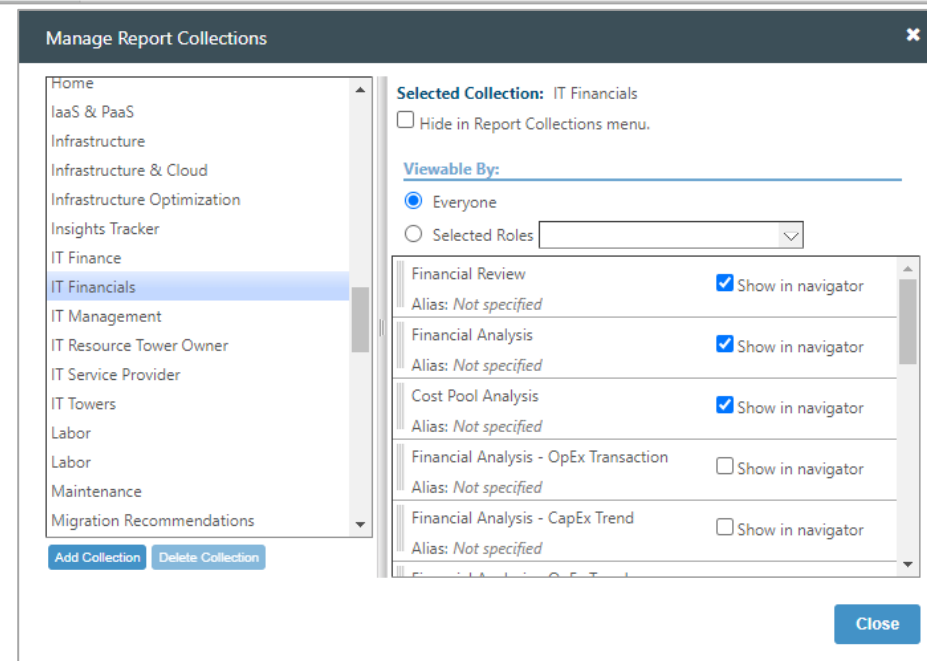
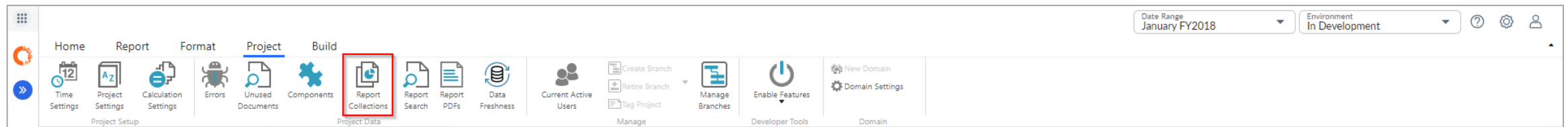
[CanComment](#) [EditPlanning](#) [ITPCompensationAdjustmentEdit](#) [Self-Service Reporting Access](#) [ViewAssets](#) [ViewContracts](#) [ViewLabor](#) [ViewPlanning](#) [ViewSpendManagement](#) [Show less](#)

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

# Report Access

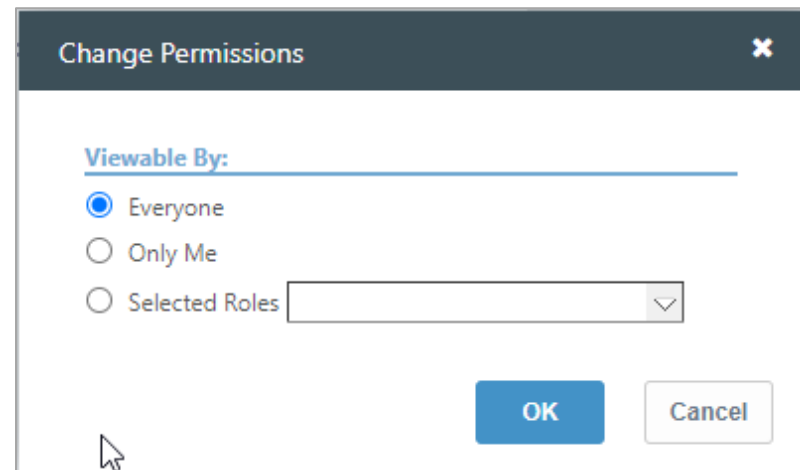
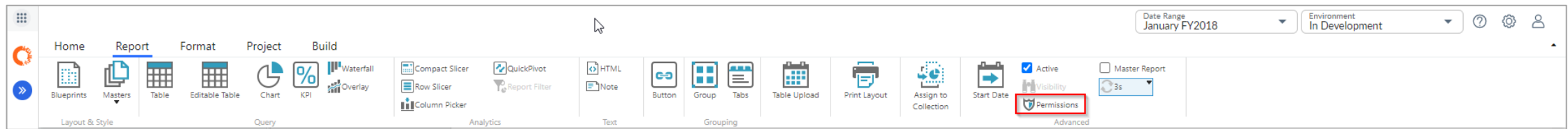
# Report Collection Permissioning

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



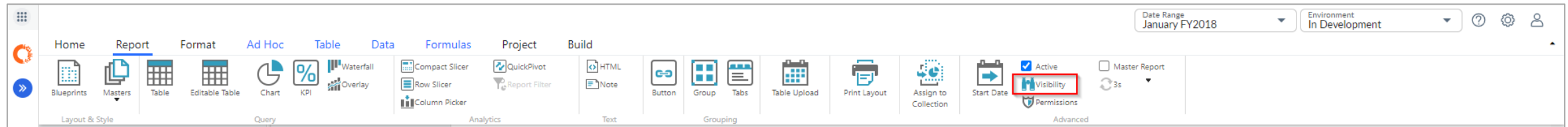
# Report Permissioning

- 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



**Report Component Visibility**

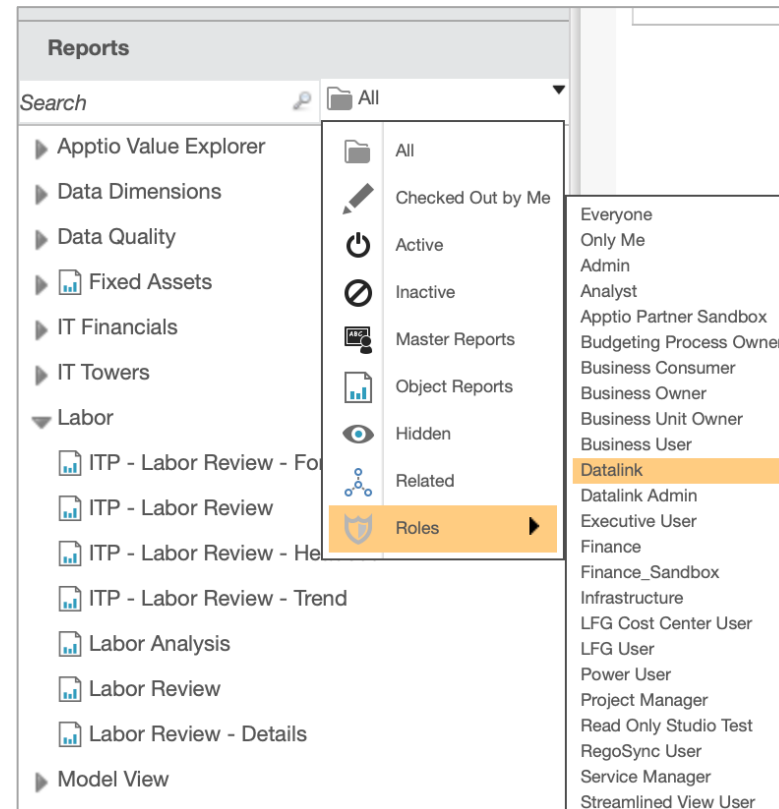
**Show Component Only If**

- Component contains data
- User's current role is
- Dynamic text does not evaluate to "hidden"

**OK** **Cancel**

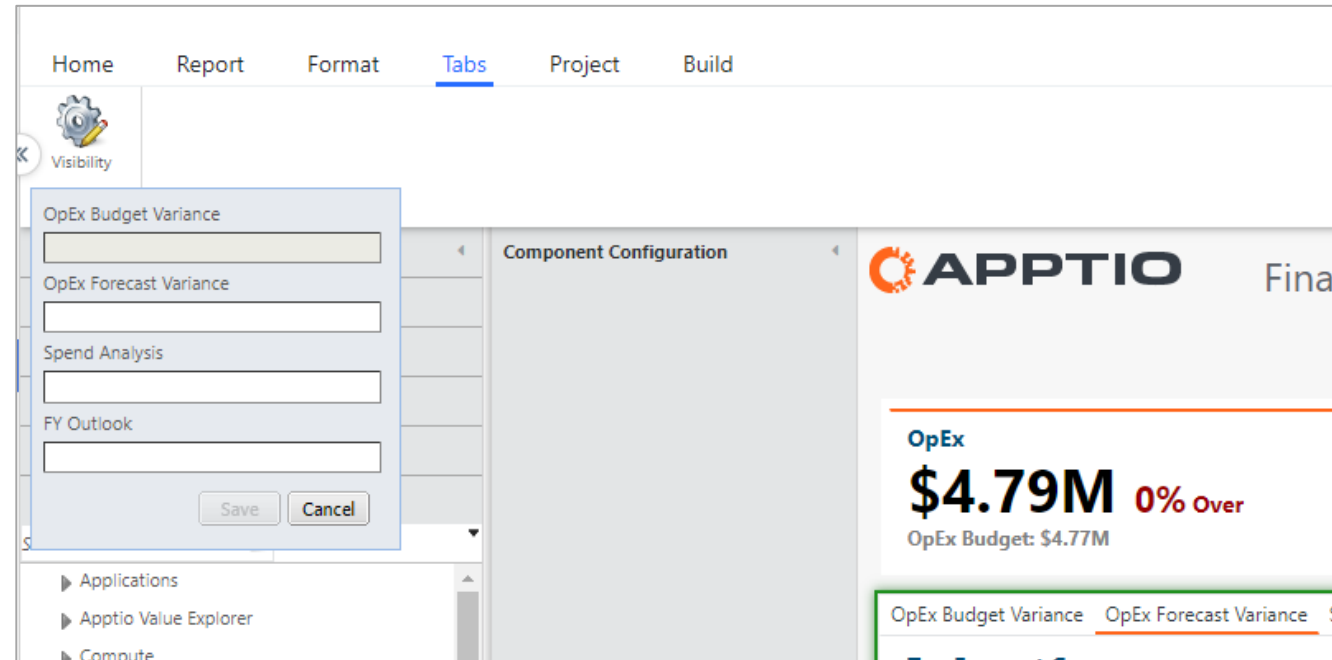
# Report Filter by Role

- To filter reports by role, displaying which reports have specific permissions assigned to that role



# Tab Component Visibility

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



# Row Level Security

# Row Level Security

## Purpose

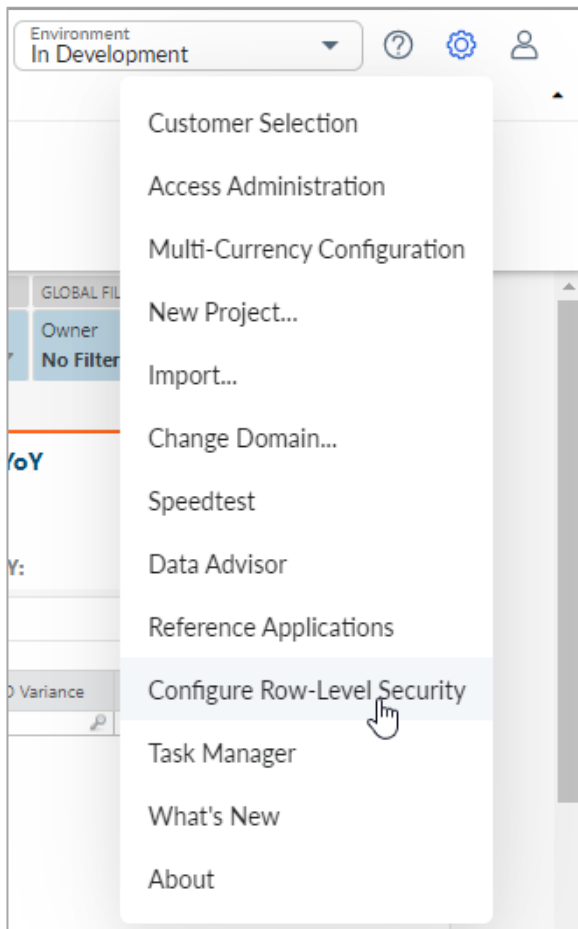
- ✔ **Row-level security** filters tables and reports based on the current user, hiding any rows not associated with them
- ✔ It **limits visibility of specific data rows** in reports and editable tables so users only see permitted information
- ✔ This **improves focus and security** by helping users quickly find relevant data while preventing access to unauthorized data

# Discussion

- ❓ Is anyone currently using the Row-Level Security feature in their projects?
- ❓ What is the primary reason for using the Row-Level Security feature?
- ❓ How are you maintaining or managing the tables that support Row-Level Security?



# Row Level Security



The screenshot shows the software interface with a table titled 'Table' (Final processed table). The table has three columns: User Email, Cost Center, and Department ID. The table is read-only, as indicated by the warning message 'This document is read only - check it out to make changes.' The 'Table' button in the 'Steps' panel is highlighted in orange.

User Email	Cost Center	Department ID
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
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

Source

Model

Row-Level Security

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

...ster Data.Cost Center

intersects

... Level Security Demo

Cost Center

where user is

User Email

✕

OR

...ata.Department Code

intersects

... Level Security Demo

Department ID

where user is

User Email

✕

Add condition

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 'API Keys' section for the user 'eric.chan@regoconsulting.com'. The interface includes a search bar with 'eric' entered, a '+ API Key' button, and a table of existing API keys. The table has columns for Name, Expiration Policy, Expiry, Description, and Environments. Two keys are listed: 'API Testing Key' and 'Testing Key', both with 'No Expiration' and descriptions related to data management and upload.

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](http://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](mailto:info@regoconsulting.com)



### Website

[www.regouniversity.com](http://www.regouniversity.com)