Chicago 2026

regoUniversity

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

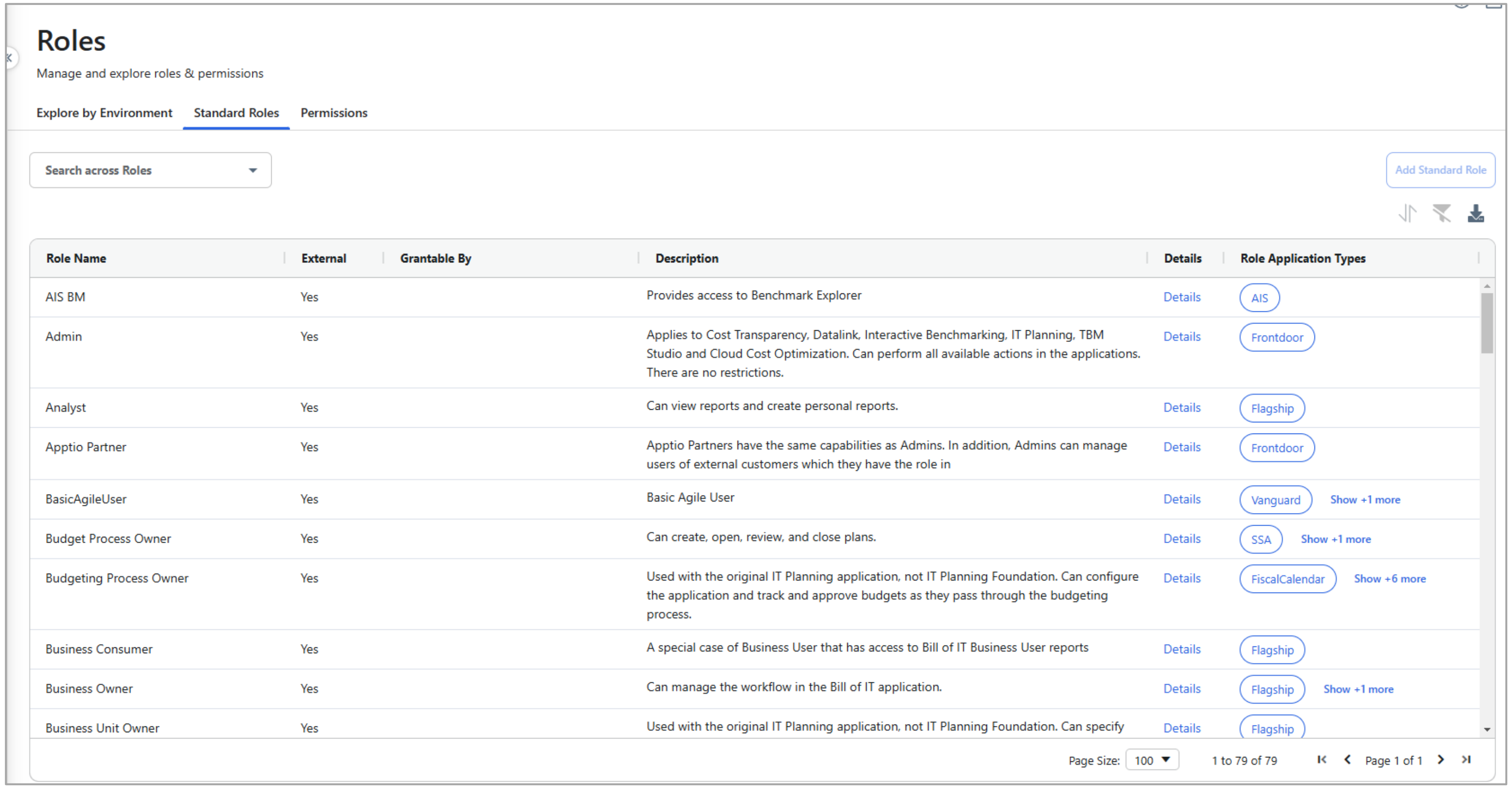
Discussion

Are there any access or security challenges related to Apptio within your organization?

Apptio Roles

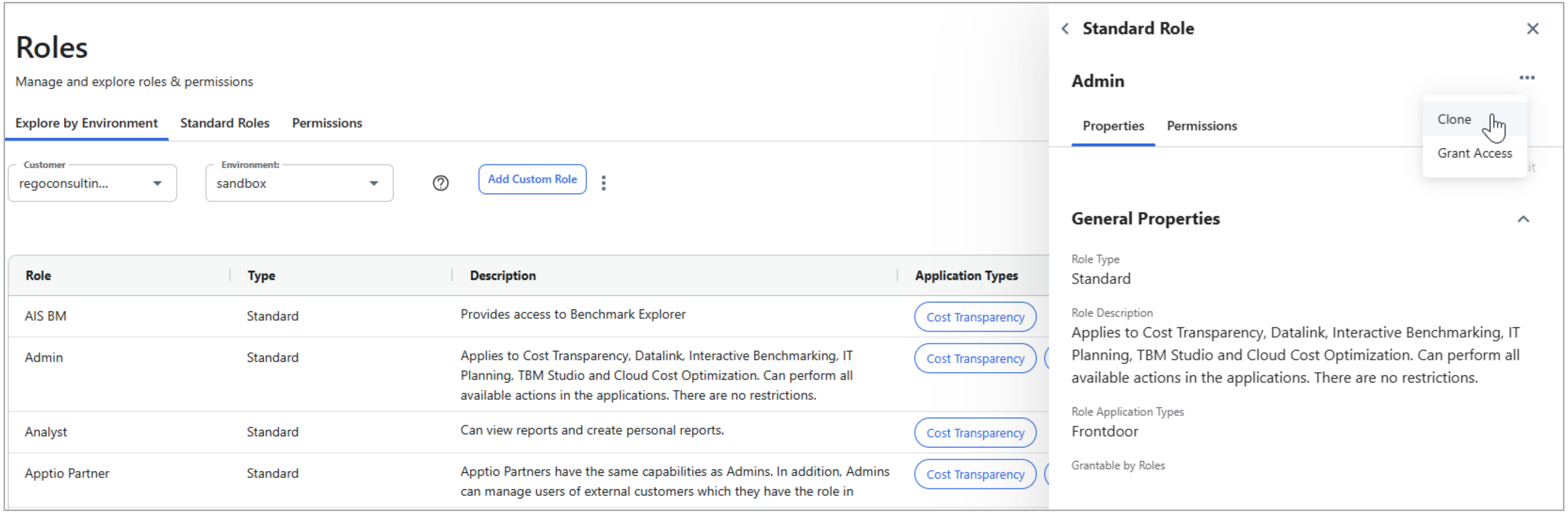
Standard Roles vs Custom Roles

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



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



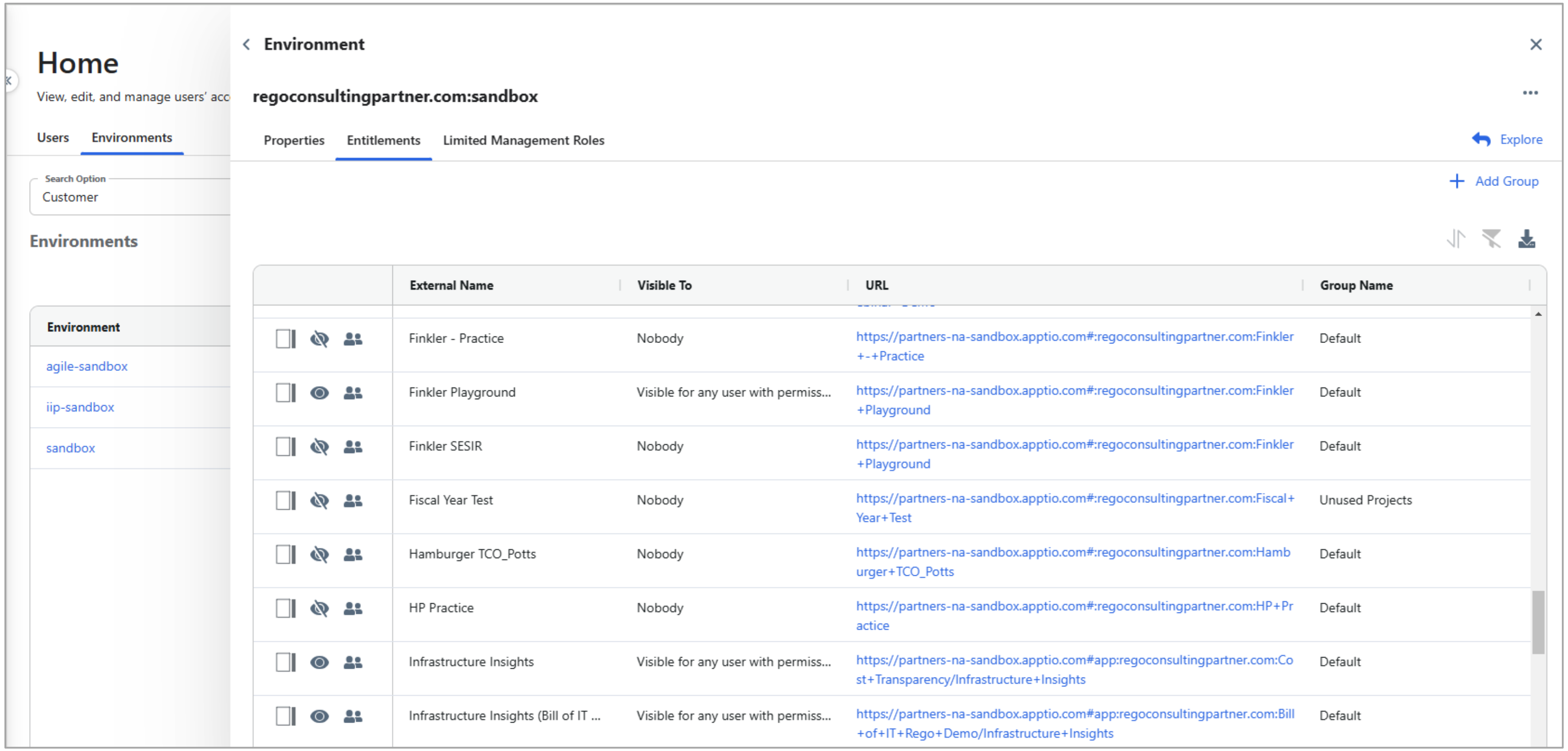
Discussion

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

Application Access

Application Permissioning

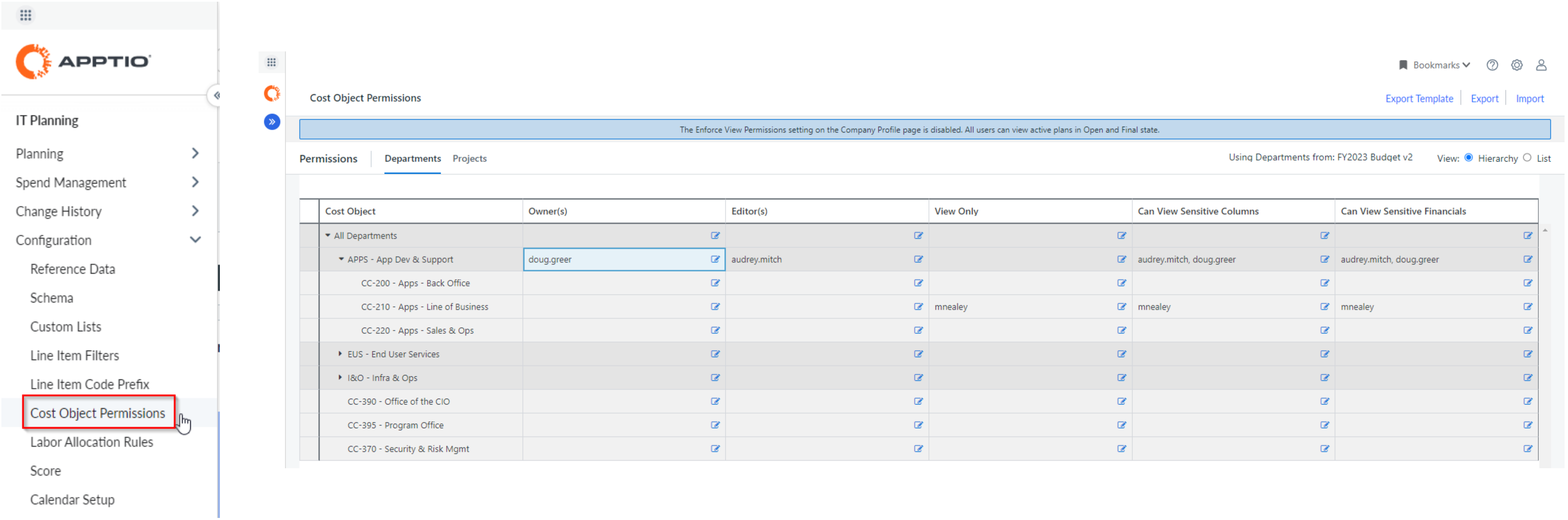
- Frontdoor – Applications
  - Control what shows on the homepage with visibility by role



ITP Access

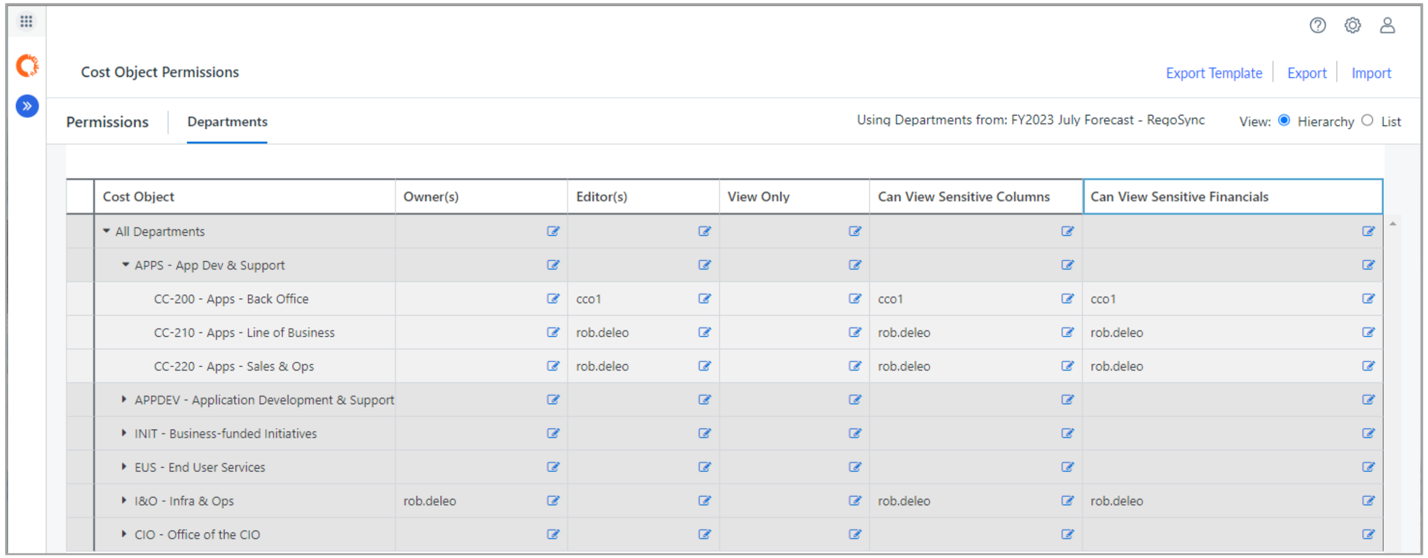
ITP Cost Object Permissions

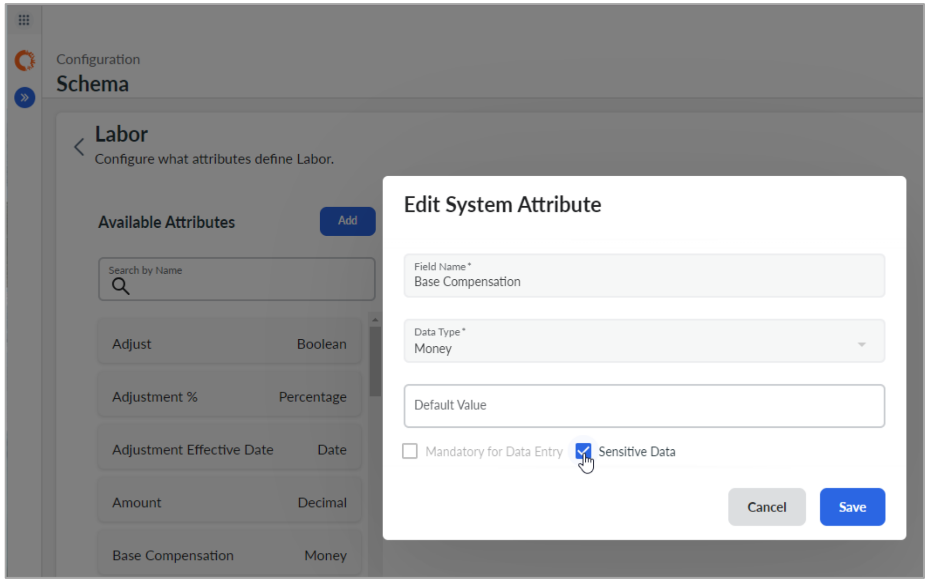
- Visibility is set in the Cost Object Permissions
  - Defines which users are allowed to access specific departments within a plan
  - Users can be added at multiple levels
  - Cost Object Permissions is a “live" table and updates are effective immediately



ITP – Sensitive Columns and Sensitive Financials

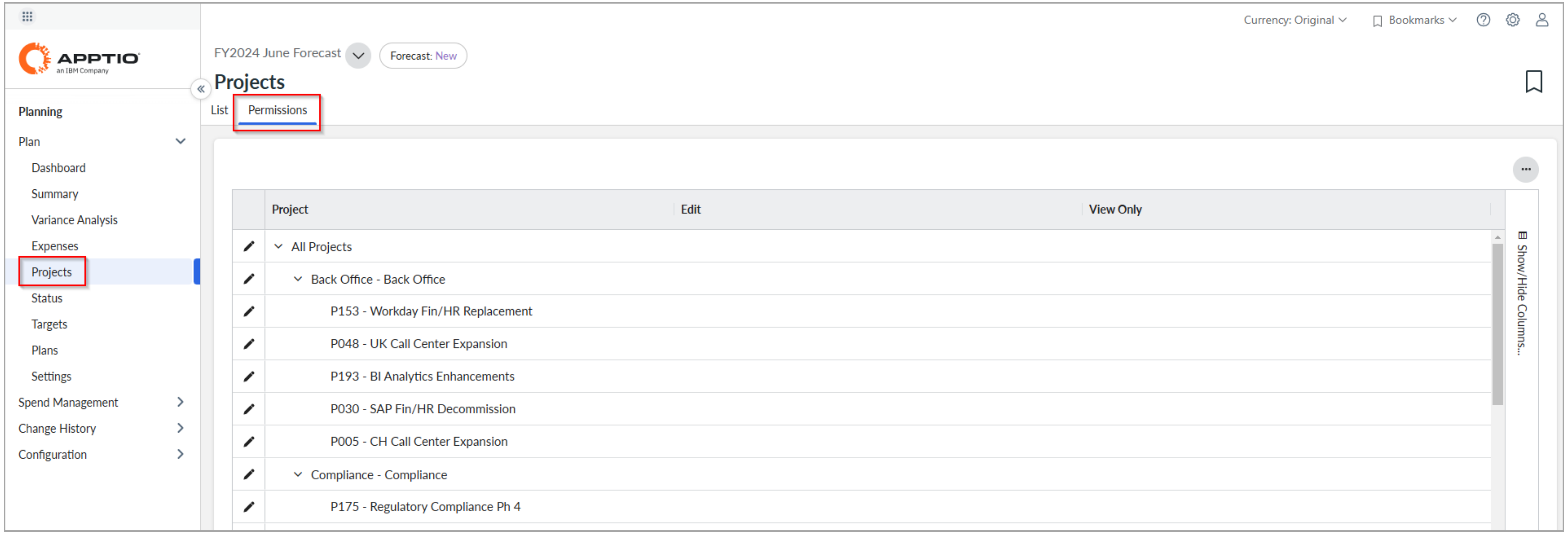
- Sensitive Columns
  - Only for the Labor tab
  - Set in the Labor schema, by selecting the column
- Sensitive Financials
  - Any line item generated by Labor Allocation Rules





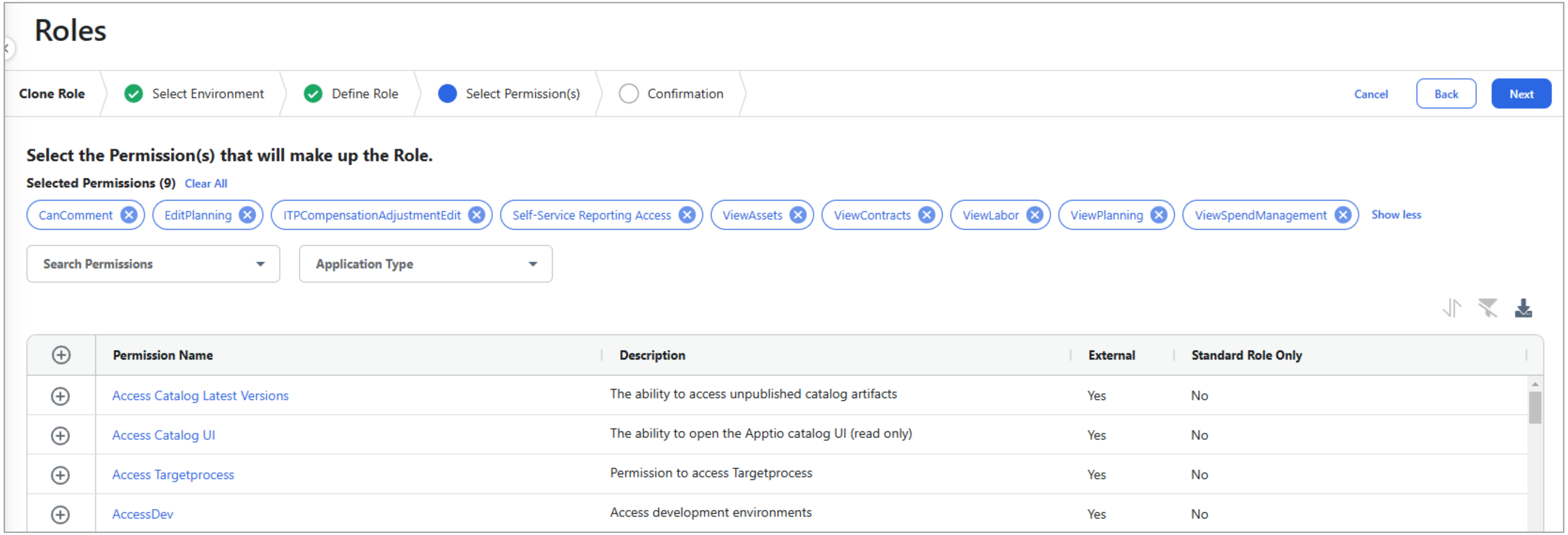
IIP - Project Permissions

- 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



ITP - Permissions

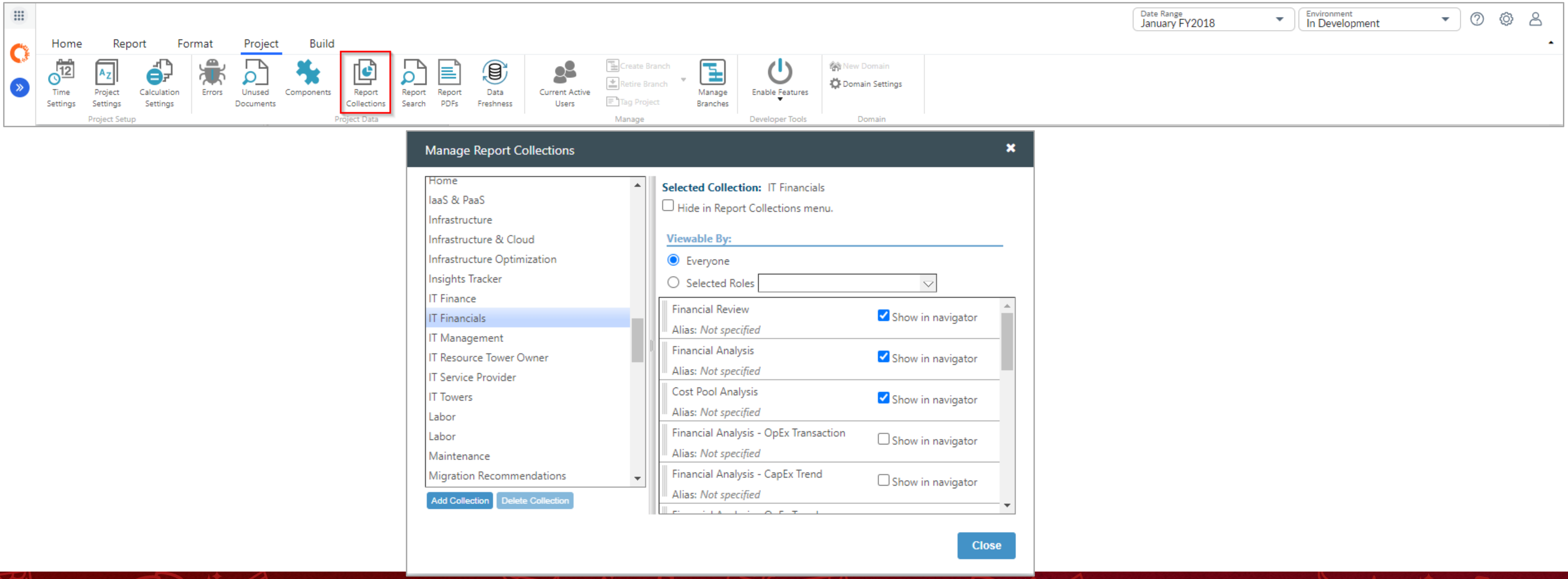
- Restrict Access to Tabs in ITP
  - Clone Cost Center Owner
  - Remove the view permission



Report Access

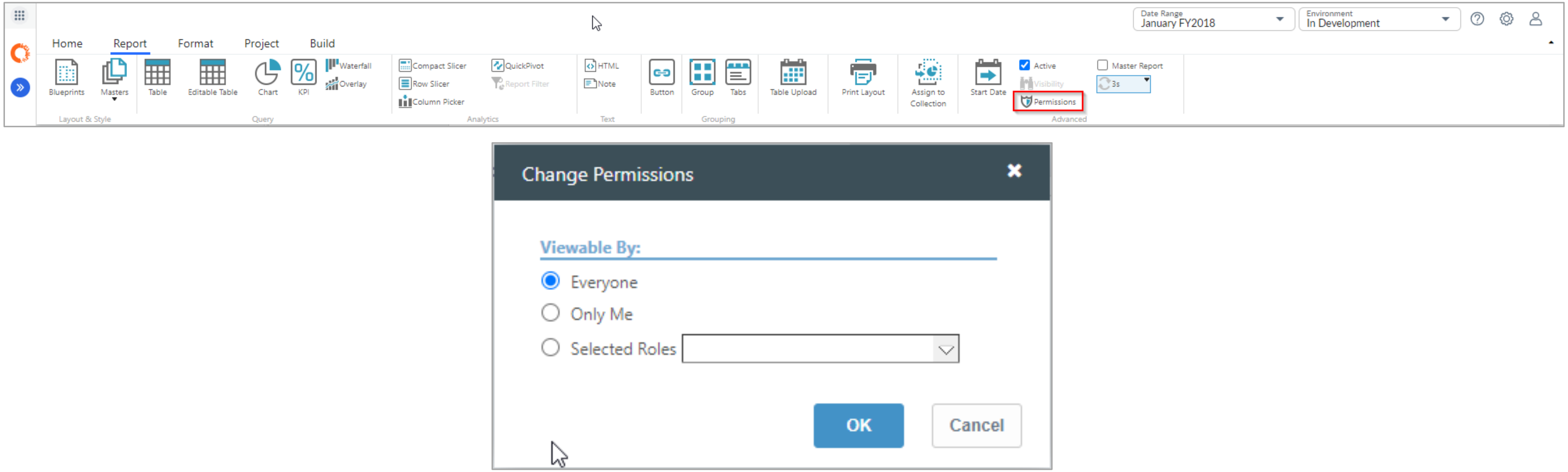
Report Collection Permissioning

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



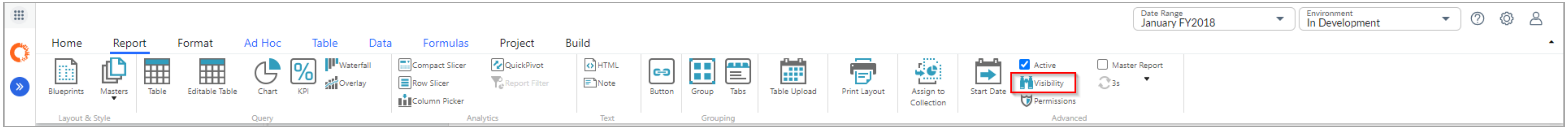
Report Permissioning

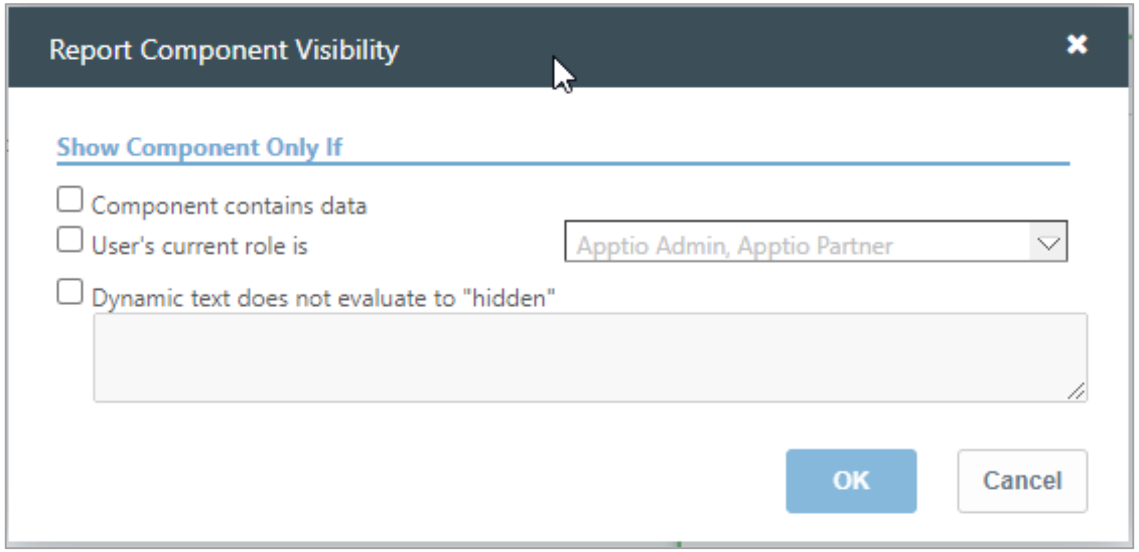
- Report Tab
  - Permissions
    - Sets what roles can see the individual report



Report Component Visibility

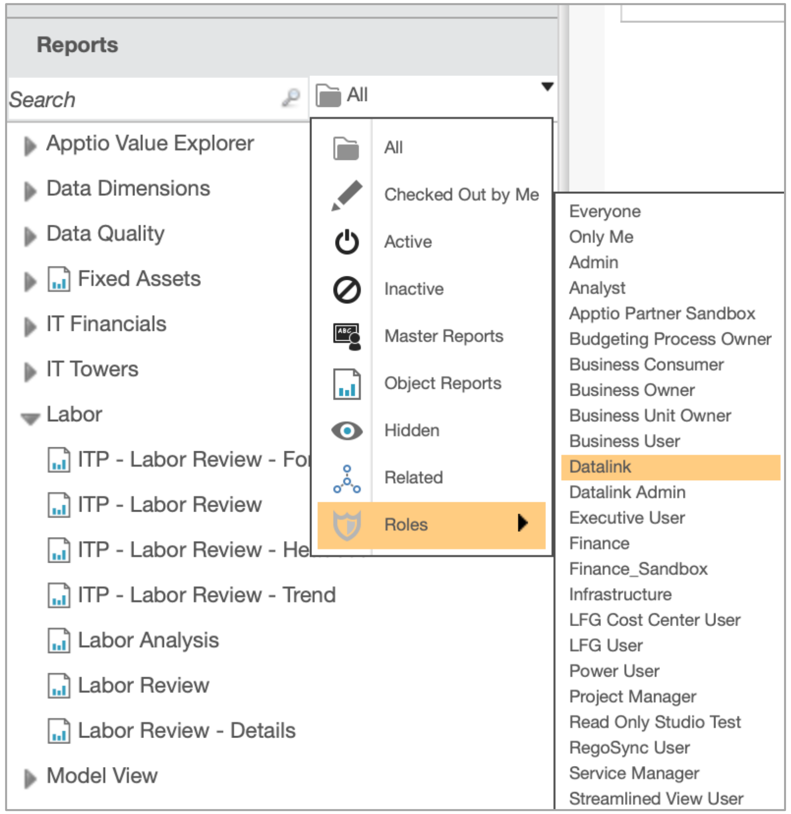
- Report Tab
  - Visibility
    - Sets what role can see the individual component
    - Can also use dynamic text to hide component





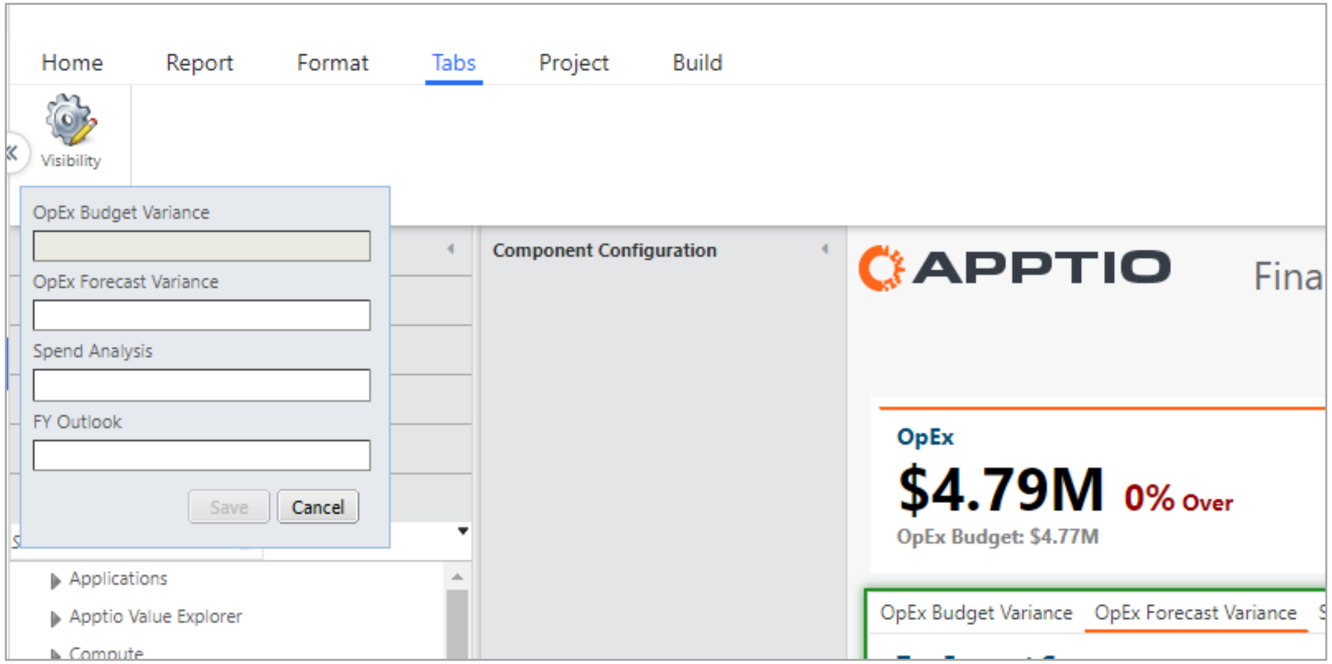
Report Filter by Role

- 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

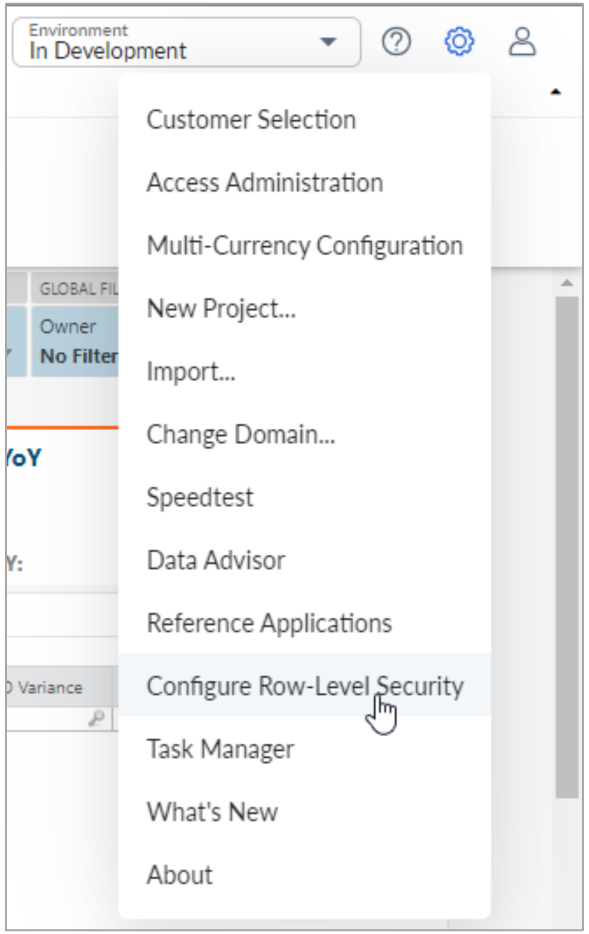
Purpose

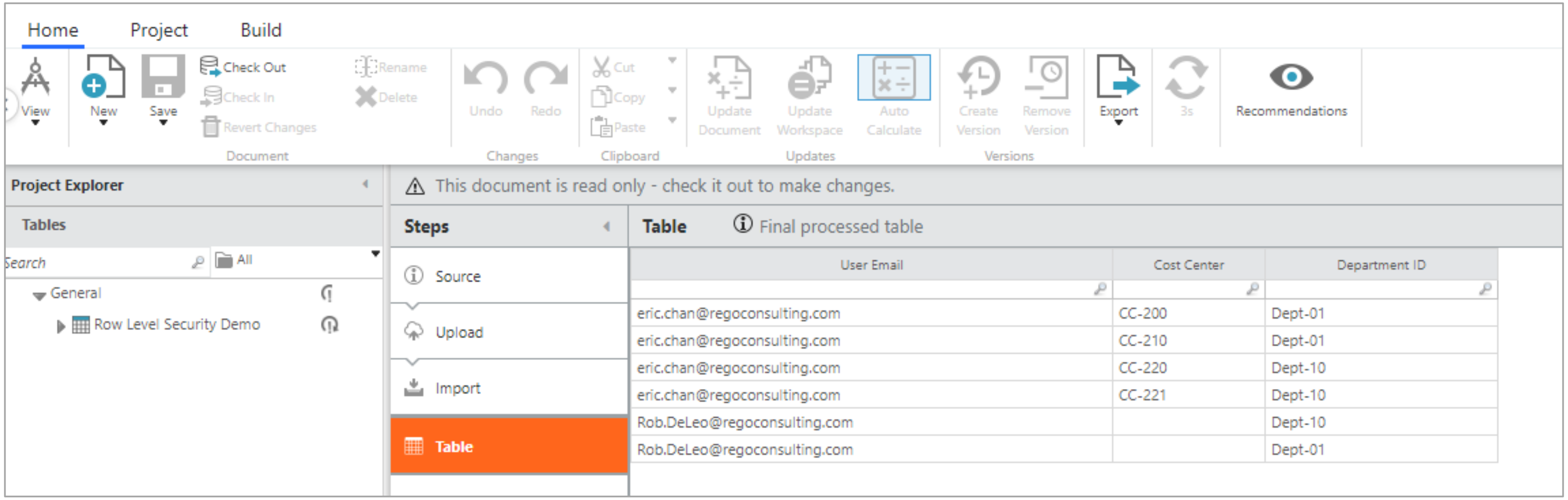
- **Row-level security** filters tables and reports based on the current user, hiding any rows not associated with them
- It **limits visibility of specific data rows** in reports and editable tables so users only see permitted information
- This **improves focus and security** by helping users quickly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

Discussion

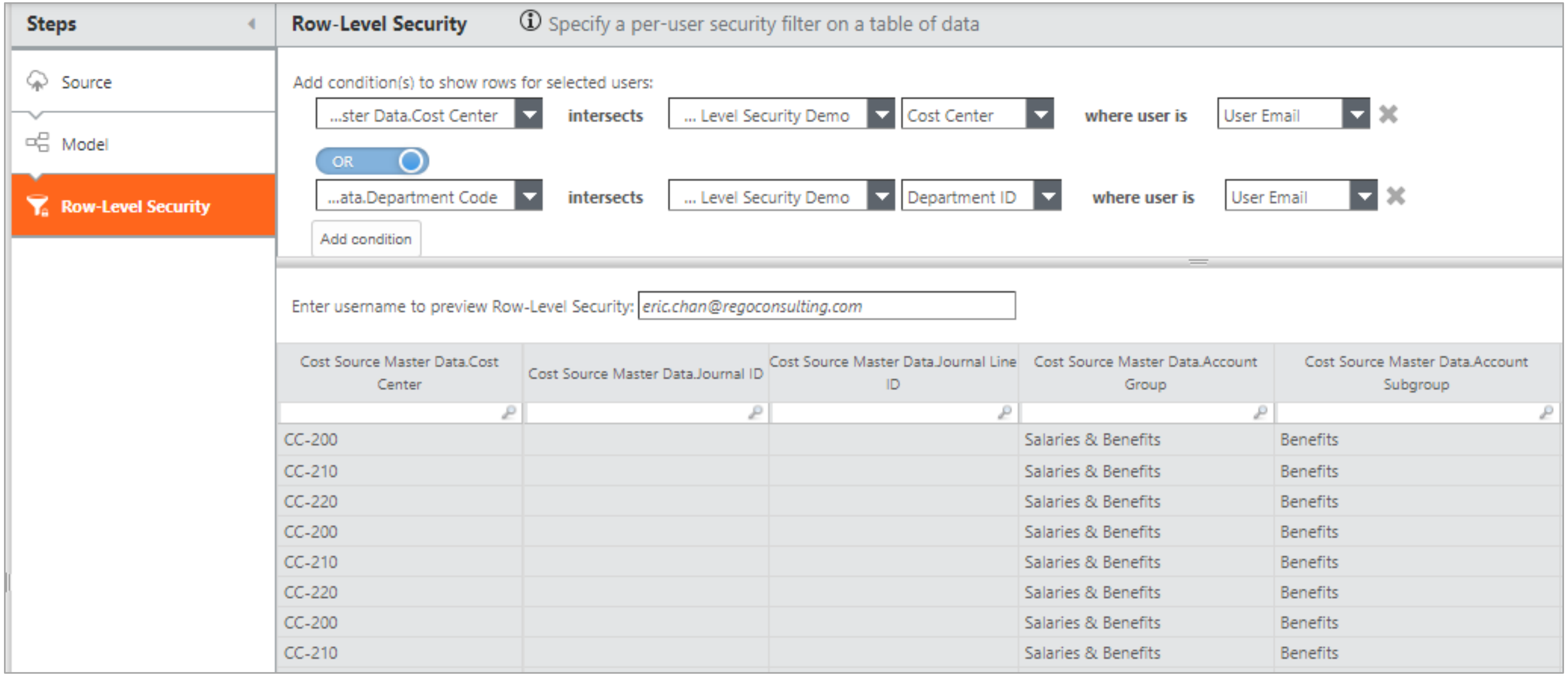
- Is anyone currently using the Row-Level Security feature in their projects?
- What is the primary reason for using the Row-Level Security feature?
- How are you maintaining or managing the tables that support Row-Level Security?

Row Level Security



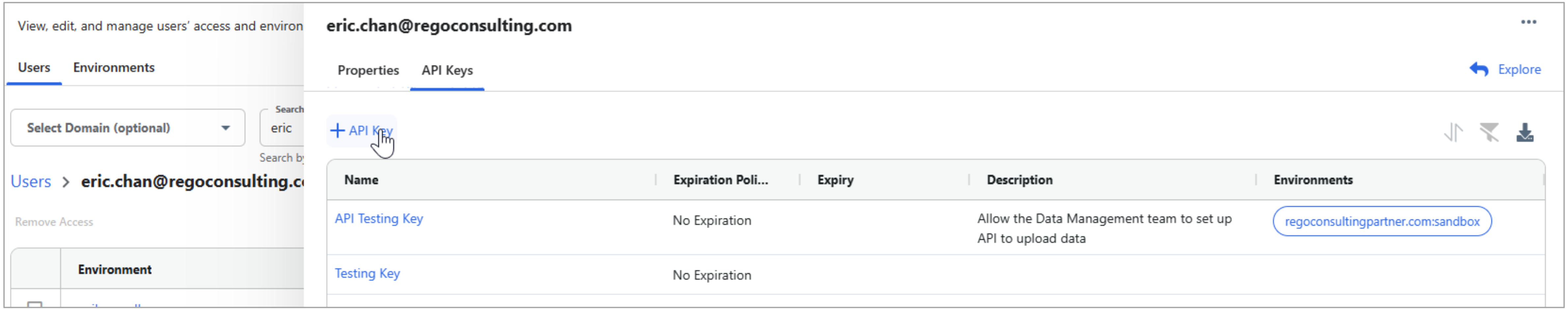


Row Level Security (Cont.)



API Tokens

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



Questions?

Surveys

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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