



# High-Impact Reporting: Tips, Tricks, and Design Principles

Your Guides:



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# Agenda

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- Introduction
- Reporting Options in Apptio
- Aiming at the Right Audience
- Reporting Best Practices
- Tips and Tricks

# Introductions

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

# Discussion

? What does the bulk of your reporting look like today?

- Out of the box
- Out of the box with tweaks
- Fully Custom
- Apptio BI
- Emails
- Exporting to other systems



# Reporting Options in Apptio

# Reporting Options In Apptio

## Out of the box

- Available as soon as you install the component
- Key data and correct fields need to be populated or the reports will have issues

## Out of the box with tweaks

- This is the sweet spot for many organizations. You can utilize the great out of the box reporting from Apptio, but tweak it to your organization.
- Hide data gaps, bring key data points to the front, add an organization specific filters, add notes, etc.

## Custom Reports

- Powerful, but time intensive. Best suited for more mature TBM Offices

## Self-Service (Apptio BI)

- This is a very cool feature and it can work in certain organizations. That said, I'm biased against it. There is a ton of awesome data in Apptio, but without the right context it can tell a story that may not be 100% accurate.

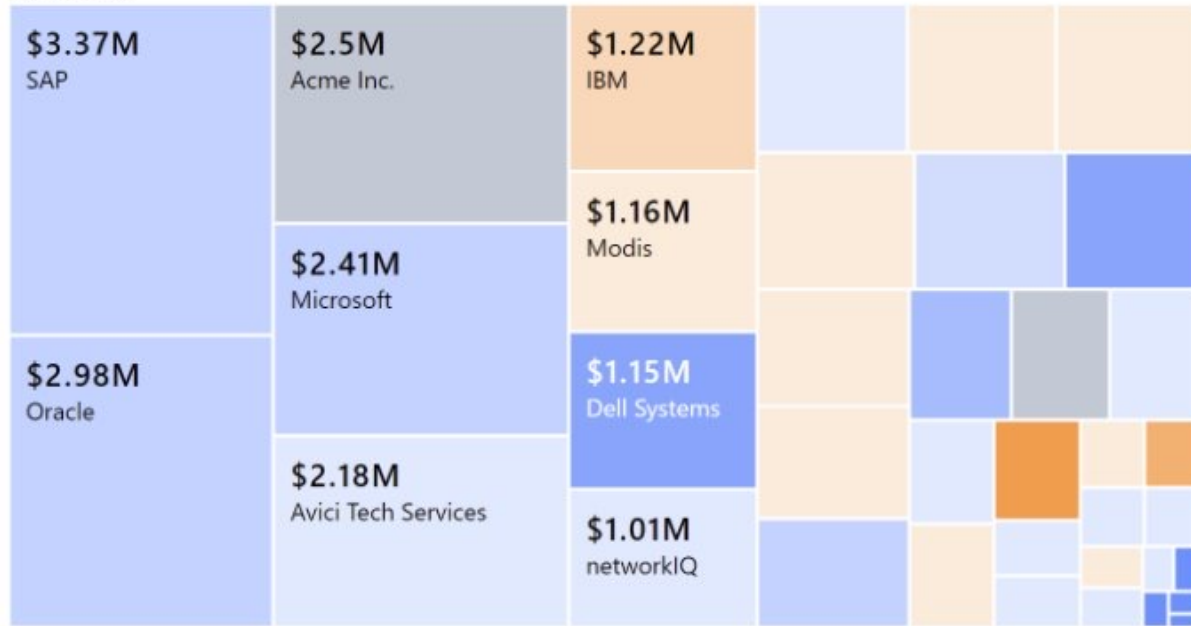
## API to other reporting tools and data warehouses

- This is becoming increasingly prominent across Rego Clients

# Out of the Box Example – ITP Dashboard

## Annual Vendor Spend

All: \$28.66M

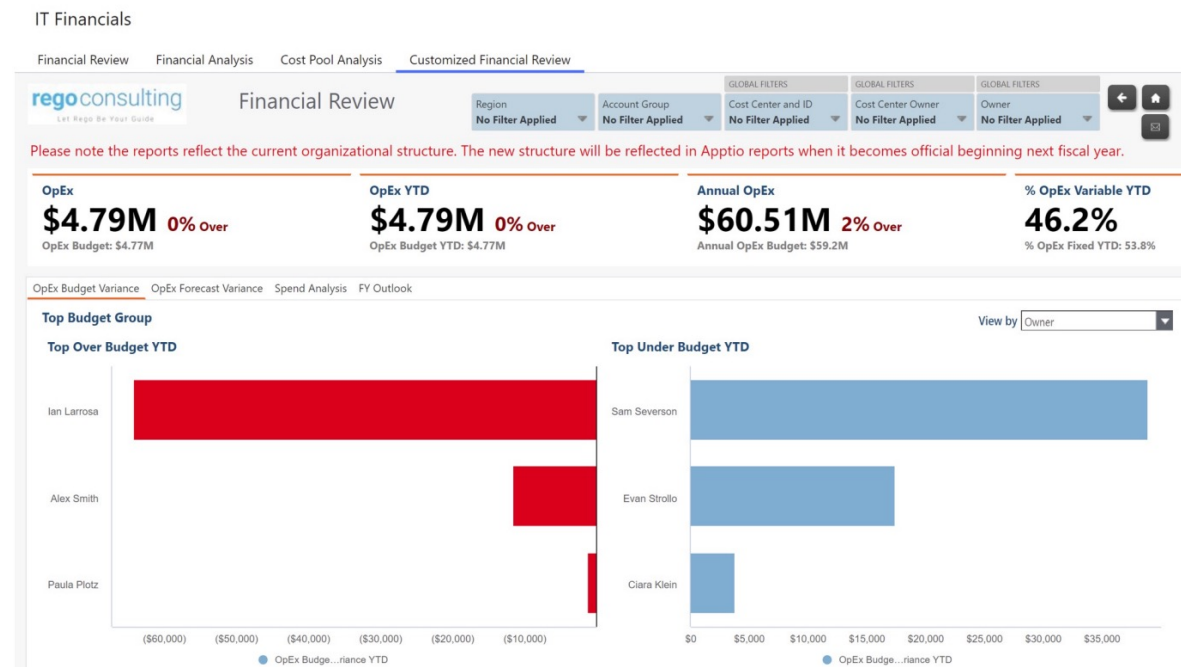
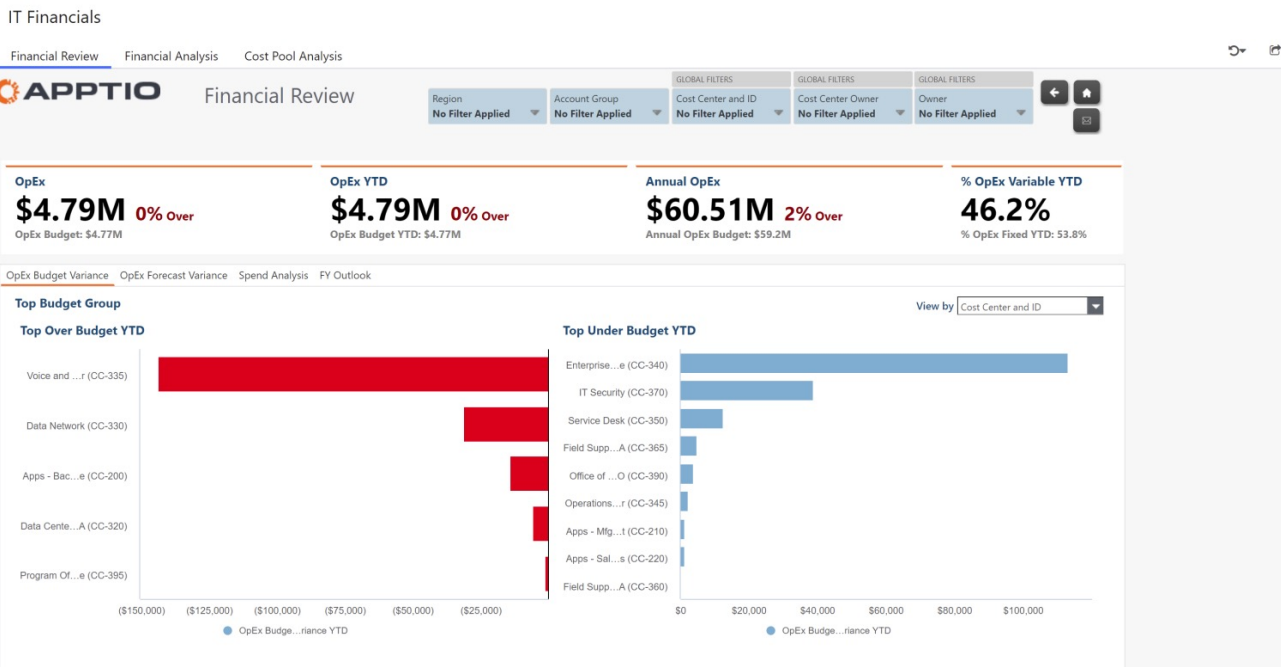


GROUP BY: Vendor → Name ▾

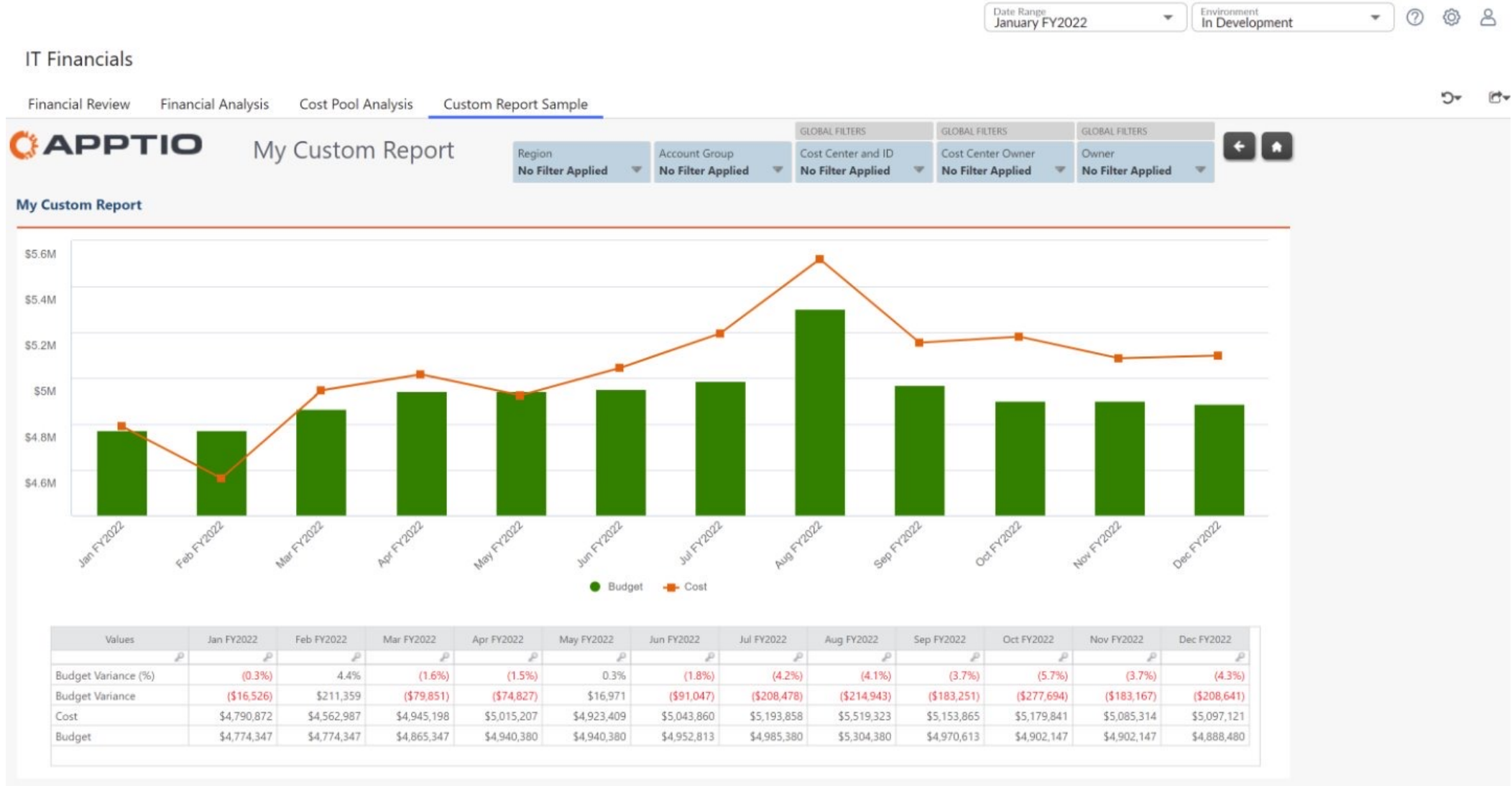
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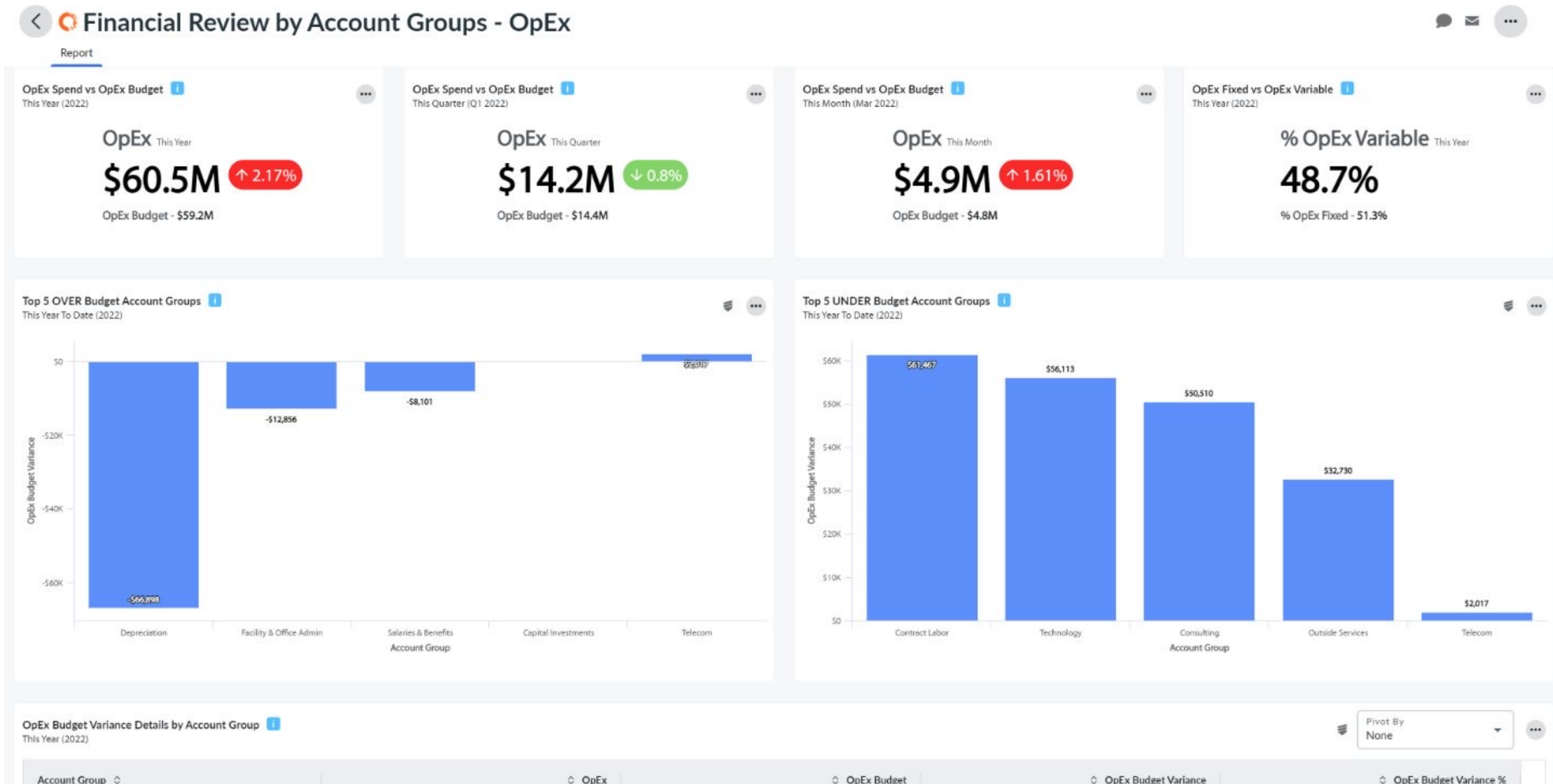
# Out of the Box with Tweaks



# Custom Reporting



# Self Service – Apptio BI



# Data Warehouse and External BI Tools



**databricks**



**CLUDERA**

**Qlik**

**teradata.**

Power BI



Many organizations have enterprise data warehouses and/or enterprise BI tools in their reporting landscape. It is important to establish where Apptio fits in your organization's reporting solution

# Rego Engage

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- Insert Rego Engage Slide here

# Aiming at the Right Audience

# Discussion

- ? Who are your main consumers today?
- ? Does your existing reporting suite meet their use cases?
- ? Who do you want your next set of users to be?
- ? Does your existing reporting suite cover what you think their use cases will be?
- ? How do your executives want to consume reports?



# Aiming at the Right Audience

- It is easy to get lost in the detail of the model
  - Take a step back and make sure you're answering the right questions for the people that you are aiming at.
- Just because you can drill to it doesn't mean that you should
  - A Business Unit owner may not care about how much of their overall Application cost came from cloud vs on prem, but a Service Owner would absolutely care about that.
- These reports should be easy for the consumer to understand immediately
  - Be mindful of the number of columns you include. If a report is serving 2 different types of users and detail is required for some use cases, but not others, than column pickers are your friend.

# Reporting Best Practices



# Reporting Best Practices

- With any report, identify the top question(s) that the report should answer
- Use the right report technology for the job (Studio, Self-Service, Enterprise, etc..)
- Converting excel reports that are already operationalized and moving them into the tool can gain big benefits
- Automation of report delivery
- Having leadership adopt the tool and utilize the tool's dashboards (eventually moving away from "receiving" dashboards to "using" dashboards)
- Ensure that the reports are designed for 'Easy Reading'
- Ensure the definition of data is uniform for all reports

What Works

- Having people go into the tool to pull out extracts and fish for the data
- Developing reports that have too many data columns, which can cause the report to lose its purpose
- Having scenarios where the user is taking a report from the system, copying and pasting parts of it into a ppt/excel, and generating another report outside of the tool
- Creating different versions of the same report for different business units. This should be handled with thoughtful filters
- Creating reports with data that is inconsistent with other systems, and not having a clear understanding of ownership of data



# “White Glove” Reporting

This can be a great strategy for building Apptio’s reputation inside your organization. You have a ton of operational data so you may be able to answer some nonstandard questions.

- What problems do you hear people bring up over and over in your sessions?
- What initiatives are front of mind for your organization?

- Examples:
  - "What if" Planning for Finance
    - Depreciation write off report
  - If you have access to revenue data
    - Profitability Reporting
    - Balance of Trade Reporting
  - M&A Reporting
    - “IT as a Service”. Highlight the big item spend before merged group fully incorporated into your IT Organization
    - Asset Conveyance Report – Laptops moving over, servers being decommissioned, etc.

# Reporting Tips and Tricks



# Reporting Tips and Tricks (Live Demo)

- Color Palette Tricks - Incorporate your company's color scheme into your reporting
  - KPIs
  - Charts
  - HTML
  
- HTML Components
  - Basic Notes
  - Custom Buttons
  - Last updated dates
  
- Exporting Data
  - Right clicking a table on the scroll bar lets you get just that table. If you select export at the top it exports the entire report.
  - Context menu is also an option

# Reporting Tips and Tricks (Live Demo)

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- ✓ Swap between table and chart
- ✓ Master Report Templates
- ✓ Conditional Formatting
- ✓ Value Field Settings

# Questions?



# Surveys

Please take a few moments to fill out the class survey.  
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