



Editable Tables Unlocked: Expert-Level Tips and Tricks

Your Guides:



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Agenda

- What are Editable Tables?
- Use Cases for Editable Tables
- Examples of Editable Tables
- Demo of Functionality of Editable Tables


Part I: What are Editable Tables

What are Editable Tables?

Tables configured in TBM Studio and published onto a reporting surface allowing end users to be able to add/edit data in a controlled format without access to Studio.



Editable Table - Example



Mapping Tables

Account to Cost Pool Mapping

Date Range: January FY2023

Environment: In Development

Account to Cost Pool Mapping

Account	Account Description	Account Group	Account Subgroup	Expense Type	Discretionary/Non-Discretionary	Fixed Variable	Cost Pool	Cost Sub Pool
ACCT_6500	Capitalized Telecom	Capital Investments	Capitalized Technology	CapEx	Discretionary	Variable	Telecom	Capital
ACCT_6400	Capitalized Facilities	Capital Investments	Capitalized Technology	CapEx	Discretionary	Variable	Other (1)	Capital
ACCT_6300	Capitalized Software	Capital Investments	Capitalized Technology	CapEx	Discretionary	Variable	Telecom (5)	Capital
ACCT_6200	Capitalized Hardware	Capital Investments	Capitalized Technology	CapEx	Discretionary	Variable	Hardware (5)	Capital
ACCT_6100	Capitalized External Labor	Capital Investments	Capitalized Labor	CapEx	Discretionary	Variable	Software (5)	Capital
ACCT_6000	Capitalized Internal Labor	Capital Investments	Capitalized Labor	CapEx	Non-Discretionary	Fixed	External Labor (2)	Capital
ACCT_4034	Depr - Real estate assets	Depreciation	Real Estate & Facilities	OpEx	Non-Discretionary	Fixed	Internal Labor (2)	Depreciation & Amortization
ACCT_4033	Depr - Office FFE	Depreciation	Real Estate & Facilities	OpEx	Non-Discretionary	Fixed	Outside Services (4)	Depreciation & Amortization
ACCT_4032	Depr - Leasehold Improvements	Depreciation	Real Estate & Facilities	OpEx	Non-Discretionary	Fixed	Internal Services (1)	Depreciation & Amortization
ACCT_4031	Depr - Capital Leases	Depreciation	Real Estate & Facilities	OpEx	Non-Discretionary	Fixed	Facilities & Power (5)	Depreciation & Amortization
ACCT_4030	Depr - Bldg and land Improvments	Depreciation	Real Estate & Facilities	OpEx	Non-Discretionary	Fixed	Find...	Depreciation & Amortization
ACCT_4022	Depr - Vehicles	Depreciation	Equipment	OpEx	Non-Discretionary	Fixed		Depreciation & Amortization
ACCT_4021	Depr - Office Equipment	Depreciation	Equipment	OpEx	Non-Discretionary	Fixed	Hardware	Depreciation & Amortization
ACCT_4020	Depr - Computer Equipment	Depreciation	Equipment	OpEx	Non-Discretionary	Fixed	Hardware	Depreciation & Amortization
ACCT_4015	Depr - Software Development	Depreciation	Software	OpEx	Non-Discretionary	Fixed	Software	Depreciation & Amortization
ACCT_4010	Depr - Computer Software	Depreciation	Software	OpEx	Non-Discretionary	Fixed	Software	Depreciation & Amortization
ACCT_3016	Business Software	Technology	Software	OpEx	Non-Discretionary	Fixed	Software	Maintenance & Support
ACCT_3015	Systems Software & Tools	Technology	Software	OpEx	Non-Discretionary	Fixed	Software	Maintenance & Support
ACCT_3012	Software as a Service	Technology	Software	OpEx	Non-Discretionary	Variable	Outside Services	Cloud Service Providers
ACCT_3011	Contract Tech labor	Contract Labor	Contract Labor	OpEx	Discretionary	Variable	External Labor	Expense
ACCT_3010	Mainframe Software & Tools	Technology	Software	OpEx	Non-Discretionary	Fixed	Software	Maintenance & Support
ACCT_3009	Outsourcing Services	Outside Services	Outsourcing	OpEx	Non-Discretionary	Variable	Outside Services	Managed Service Providers
ACCT_3008	IaaS/PaaS Services	Technology	Hardware	OpEx	Non-Discretionary	Variable	Outside Services	Managed Service Providers
ACCT_3007	Outside Services - Other	Outside Services	Outside Services	OpEx	Discretionary	Variable	Outside Services	Managed Service Providers
ACCT_3006	Telecomm Tech Services	Outside Services	Tech Services	OpEx	Discretionary	Variable	Outside Services	Managed Service Providers

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Signed in as: Rob DeLeo

Benefits of Editable Tables

- Eliminates the Upload step for tables where Apptio is the system of record such as mapping tables
- Data quality control
 - Ability to track changes
 - Improve verification and acceptance
 - Drive accountability and adoption
- Minimize data entry
 - Keep data fresh
- Share mapping responsibilities
 - Empower data owners to maintain their information
- Create Reports to share with end users

Part II: Use Cases

Quick Poll

- Have you used editable tables in your TBM solution?
- What use cases have you rolled out using editable tables?



Data Cleansing or Enrichment



Problem: Gaps in raw data, inability to update source data (even for SMEs).

- Example: Missing vendor information, product/asset metadata in CMDB



Solution: canThru editable tables, SMEs update missing fields with the relevant information.



Outcome: Improved report usability and value due to the elimination of blank values, better cost allocation due to more complete data.

Data Cleansing or Enrichment – Example

Project Status Report Product Catalog Administration **Product Catalog** App Consumption Upload Product Forecast

Product Catalog Maintenance

Add or change new product offerings, categorization and life cycle

Product ID	Product	Product Description	Life Cycle	Unit of Measure	Price	Product Family ID	Product Family	Product Group ID	Product Group
PID-027	Bring Your Own Device	Services to support privately owned mobile devices and laptops	Active	Device	\$25.00	PFID-002	Workplace	PGID-006	Client Computing
PID-028	Computer	Company supplied desktop computers	Active	Computer	\$250.00	PFID-002	Workplace	PGID-006	Client Computing
PID-029	Mobile	Laptop and mobile devices	Active	Laptop	\$125.00	PFID-002	Workplace	PGID-006	Client Computing
PID-030	Virtual Client		Active	Instance	\$15.00	PFID-002	Workplace	PGID-008 (Connectivity)	
PID-031	Collaboration		Active	User		PFID-002	Workplace	PGID-007 (Communication & Collaboration)	
PID-032	Communication		Active			PFID-002	Workplace	PGID-006 (Client Computing)	
PID-033			Active			PFID-002	Workplace	Find...	
PID-034			Active			PFID-002	Workplace	PGID-007	Communication & C
PID-035			Active			PFID-002	Workplace	PGID-008	Connectivity
PID-036			Active			PFID-002	Workplace	PGID-008	Connectivity
PID-037	Compute on Demand		Active			PFID-002	Workplace	PGID-008	Compute
PID-038	Mainframe		Active			PFID-002	Workplace	PGID-008	Client Computing
PID-039	Physical Compute		Active			PFID-002	Workplace	PGID-008	Compute
PID-040	Virtual Compute & Containers		Active			PFID-003	Infrastructure	PGID-009	Compute
PID-041	Enterprise Data Center		Active			PFID-003	Infrastructure	PGID-010	Data Center
PID-042	Other Data Center		Active			PFID-003	Infrastructure	PGID-010	Data Center
PID-043	Data Network		Active			PFID-003	Infrastructure	PGID-011	Network
PID-044	Domain Services		Active			PFID-003	Infrastructure	PGID-011	Network

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Maintain information about the Service Catalog

Hierarchical drop-downs filtered by L1 selection

Variance Commentary

- Allow Cost Center owners to enter explanations for variances or outliers

IT Finance

Total \$9,962,924 \$12,159,250 \$2,196,326 18.1% \$51,640,643 \$60,607,347 \$8,966,704 17.4% \$123,937,542 \$142,973,190

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Please provide explanations on variances to Budget for the highlighted items above! [Click here for additional information on how to fill out each column](#)

Budget Variance Explanation

Year	Month	Cost Center	Department Code	Account Group	Vendor	Variance Explanation	Explanation	Impact Higher/Lower	Unexplained Variance Fav/(Unfav)	Total Variance Fav/(Unfav)	Created By	Date Created
FY2022	May	IT Security Support Services 0000	0000	Contract Labor	THE BARTECH GROUP INC	Unplanned Item	Unplanned contract labor	2075	2075	2075.000	Steve Green	06/10/2022 1:23 PM
FY2022	May	IT Security Support Services 0000	0000	Repairs & Maintenance	ALLIED COMMUN... LLC	Incorrect Coding	Contract was incorrectly coded to hardware instead of software	1000	2075	2175.000	Steve Green	06/10/2022 1:27 PM
FY2022	May	IT Security Support Services 0000	0000	Professional Services	ARQ LLC	Unplanned Item	2022 fee for ARQ Staff 200 support	2000	2175	2375.000	Steve Green	06/10/2022 1:25 PM
FY2022	Apr	IT Infrastructure 0000	0000	Professional Services	AT&T	Negotiated Savings	Net	100	2175.000	2175.000	jenniferm@rego.edu	06/09/2022 1:22 PM
FY2022	May	IT Systems & Compliance 0000	0000	Professional Services	ONSPRING TECHNOLO... LLC	Accounting Timing	Shipping - Admin for 2022 - Invoice 2022	200	200	200.000	Quinn Harris	06/14/2022 1:53 PM
FY2022	May	IT Systems & Compliance 0000	0000	Software and Licenses	SOLUTIONS B INC	Increase or Decrease to Plan	May 2022 - Invoice 2022 - 200.000. Quarterly budget is 200.000 but we have 100.000 left in 2022 new forecast	-1000	0	2175.000	Quinn Harris	06/14/2022 1:58 PM
FY2022	May	IT Systems & Compliance 0000	0000	Software and Licenses	ONETRUST LLC	Incorrect Coding	Contract - Cloud Software License - Accounting and in error for 12 months but in 2022 we are 12 months difference which the year ends difference	200	0	2175.000	Quinn Harris	06/14/2022 2:28 PM
FY2022	May	IT Systems & Compliance 0000	0000	Software and	INTERNATI...	Increase or	200.00000 - Budget reflects previous major software upgrade costs. These are	200	0	2175.000	Quinn Harris	06/14/2022 2:26 PM

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Users "add row" and enter information explain the variance to budget

Year	Month	Cost Center	Department Code	Account Group	Vendor	Variance Explanation	Explanation	Created By	Date Created	Impact Higher/Lower	Unexplained Variance Fav/(Unfav)	Total Variance Fav/(Unfav)	Department
FY2022	Apr	Cybersecurity 0000	0000	Professional Services		Cancelled Engagement/Purchase	Vendor Staff augmentation	Melvin Smith	06/10/2022 10:00 AM	200.000	200.000	200.000	No Filter Ap
FY2022	Apr	Cybersecurity 0000	0000	Professional Services	Other	Cancelled Engagement/Purchase	Vendor Network Flow Services	Melvin Smith	06/10/2022 10:00 AM	214.000	200.000	200.000	Cost Center
FY2022	Apr	Cybersecurity 0000	0000	Professional Services	AQUERA INC	Increase or Decrease to Plan	Network for the expected change	Melvin Smith	06/10/2022 10:00 AM	214.000	200.000	200.000	No Filter Ap
FY2022	Apr	Cybersecurity 0000	0000	Professional Services	BLUESOURCE	Incorrect Coding	2022 BlueSource POC 2022 Invoice but for Aug 21 through to 20	Melvin Smith	06/10/2022 10:00 AM	214.000	200.000	200.000	Account Gr

Discussion

- What else do you think editable tables could be used for?



Date and User Modified

Ad Hoc Component Configuration

Unmodeled Data

Source: Cost Center Owner ET

Included Columns

- Functional Unit
- Functional Unit Description
- Cost Center Owner
- .PK
- .Username
- .EditDate

Filters


Update Results Immediately

Update Clear

Functional Unit	Functional Unit Description	Cost Center Owner	.Username	.EditDate
CC-200	Apps - Back Office	Adam Peters	eric.chan@regoconsulting.com	February 13, 2025 10:29:38 AM PST
CC-210	Apps - Mfg & Dist	Marry Tynio	eric.chan@regoconsulting.com	January 14, 2022 9:52:25 AM PST
CC-220	Apps - Sales & Ops	Tambra Assael	eric.chan@regoconsulting.com	January 14, 2022 9:52:25 AM PST
CC-221	Apps - Sales & Ops - Sales	Ruby Ross	eric.chan@regoconsulting.com	January 14, 2022 9:52:25 AM PST
CC-222	Apps - Sales & Ops - Marketing	Stewart Wilson	eric.chan@regoconsulting.com	January 14, 2022 9:52:25 AM PST
CC-223	Apps - Sales & Ops - Customer Support	Perry Massey	eric.chan@regoconsulting.com	January 14, 2022 9:52:25 AM PST
CC-224	Apps - Sales & Ops - BU2	Kara Brock	eric.chan@regoconsulting.com	January 14, 2022 9:52:25 AM PST
CC-225	Apps - Sales & Ops - BU3	Erica Lawrence	eric.chan@regoconsulting.com	January 14, 2022 9:52:25 AM PST
CC-226	Apps - Sales & Ops - APAC	Shelley Norton	eric.chan@regoconsulting.com	January 14, 2022 9:52:25 AM PST
CC-227	Apps - Sales & Ops - EMEA	Adam Peters	eric.chan@regoconsulting.com	January 14, 2022 9:52:25 AM PST

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Possible Values Syntax

- Fetch data from editable table, return unique values
 - `%.EditableTable:tableName/LIMIT_COLUMNS[columnName]/!GROUPBY[columnName]`
- Fetch data from standard table, return unique values and sort by ascending
 - `%tableName/!GROUPBY[{columnName}]/!LIMIT_COLUMNS[{columnName}]/!SORT[{columnName}|asc,{columnName}|asc]`

Possible Values Dropdown Dependency



Purpose of this is to create a dependent dropdown based on selection in another cell.

- `%DestinationTable/!FILTER[DestinationColumnName="<%=SourceColumnName %>"]/!GROUPBY[DestinationColumnValue]/!LIMIT_COLUMNS[Destination Column Value]`

Configure Columns ⓘ Select a column to edit its properties

<p>Column Name ▲</p> <input style="width: 90%;" type="text"/>	<p>Name: <input style="width: 95%;" type="text" value="Department Name"/></p>
<p>.PK</p>	<p>Description: <input style="width: 95%;" type="text"/></p>
<p><input type="checkbox"/> Cost Center ID</p>	<p>Type: <input type="text" value="Label"/> ▼</p> <p>ⓘ Can't change type when there are unsaved changes</p>
<p><input type="checkbox"/> Cost Center Name</p>	<p>Date Format: <input style="width: 95%;" type="text"/></p>
<p><input checked="" type="checkbox"/> Department Name</p>	<p>Possible Values: <input !groupby[department="" !limit_columns[department="" <%="Cost" center="" id%>"]="" name]="" name]"="" style="width: 95%;" type="text" value="%Cost Center Owner Mapping/!FILTER[Functional Unit="/></p>
<p><input type="checkbox"/> Name</p>	<p>Possible Values Context: <input style="width: 95%;" type="text" value="Current Row"/></p>
<p><input checked="" type="checkbox"/> Add a new column</p>	<p>Allow Values Not In Possible Values List: <input type="checkbox"/></p> <p>Disallow Edit In Possible Values Cell: <input type="checkbox"/></p>

Possible Values Dropdown Dependency Continued

Steps	Editable Table Preview table			
Upload	Cost Center ID	Department Name	Cost Center Name	Name
Configure Columns				
Editable Table	CC-200	<input type="text" value="Apps"/>		Adam Peters
Validation	CC-210	<input type="text" value="Find..."/>		Brenda Moreno
Row Level Security				Ciara Klein
				Eric Chan
				Erica Lawrence

Lookup Value From Another Table

{row.Source Column Name}=lookup(Source Column Name, Destination Table Name, Destination Column Name, Return Value)

Example

- {row.Cost Center Name}=lookup(Cost Center, Acme Cost Center List, Cost Center ID, Cost Center Name)

Role-Based Editable Cells

```
If "<%=CurrentUser:Users.Role%" = "Apptio Admin"  
    row.Amount.isEditable="false"  
Else  
    row.Amount.isEditable="true"  
End If
```

Event Types

✓ You can utilize Apptioscript to trigger based on certain events within the editable table. Here are some of the commonly used events:

- onload
- cellEdit
- addRow
- duplicateRow

✓ Example would be using Apptioscript to populate the user who edited the row.

- if eventType = "cellEdit" OR eventType = "addRow"
- row.User = "<%=CurrentUser:Users.Id%>"
- end if

Latest Release

deleteAllrows - functionality for Editable table will delete only the currently filtered set of rows when filters are applied. If no filters are applied, all rows in the editable table will be deleted.



Part III: Demo of Editable Tables

Consumer Products Company – OpEx Tail Tracking



Problem: Manual excel file maintained to track project OpEx spend that would need to move to run budget. Data quality issues due to manual entry of data. Time consuming to gather all data needed. Reporting was manual and not visible to everyone.



Solution: Created Editable table with necessary data columns. Used dropdowns and lookups to limit data entry requirements and maintain data quality. Created custom report collection to allow end users to review and analyze data.



Outcome: Significant increase in data quality issues, and visibility to the information. During budget process, data was able to be added into IT Planning budget quickly and easily.

Surveys

Please take a few moments to fill out the class survey.
Your feedback is extremely important for future events.





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