Chicago 2026

regoUniversity

Apptio • Targetprocess • Cloudability

What's New in Apptio Costing and Planning

Your Guides:

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Agenda

- Introduction
- Checking Your Apptio Version
- Helpful Features in 2026
- Demo and Walkthrough
- Questions

Introductions

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

Discussion

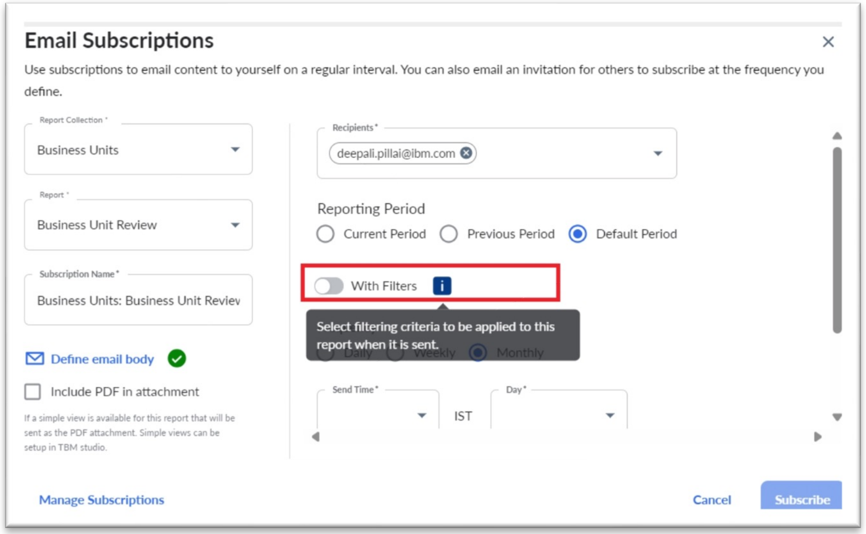
- What new features in the past year have been easiest for your teams to adopt?
- Which new features are you still exploring or unsure how to apply?
- Which new features require more refinement or better alignment with your workflows?

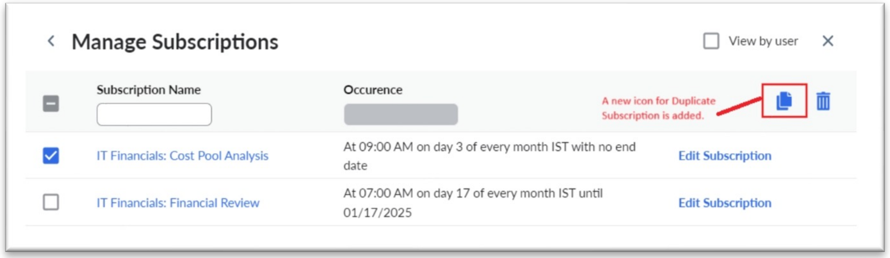
Checking Your Apptio Version

Release information for IBM Apptio Costing & Planning
https://www.ibm.com/docs/en/apptio-commercial/tbm-studio/saas?topic=studio-recent-releases

- Server Version 12.11.18
- Client Version 2.19.0
- Content Version

Email Distribution Enhancements





Filtered views subscriptions

Share filtered reports via subscriptions

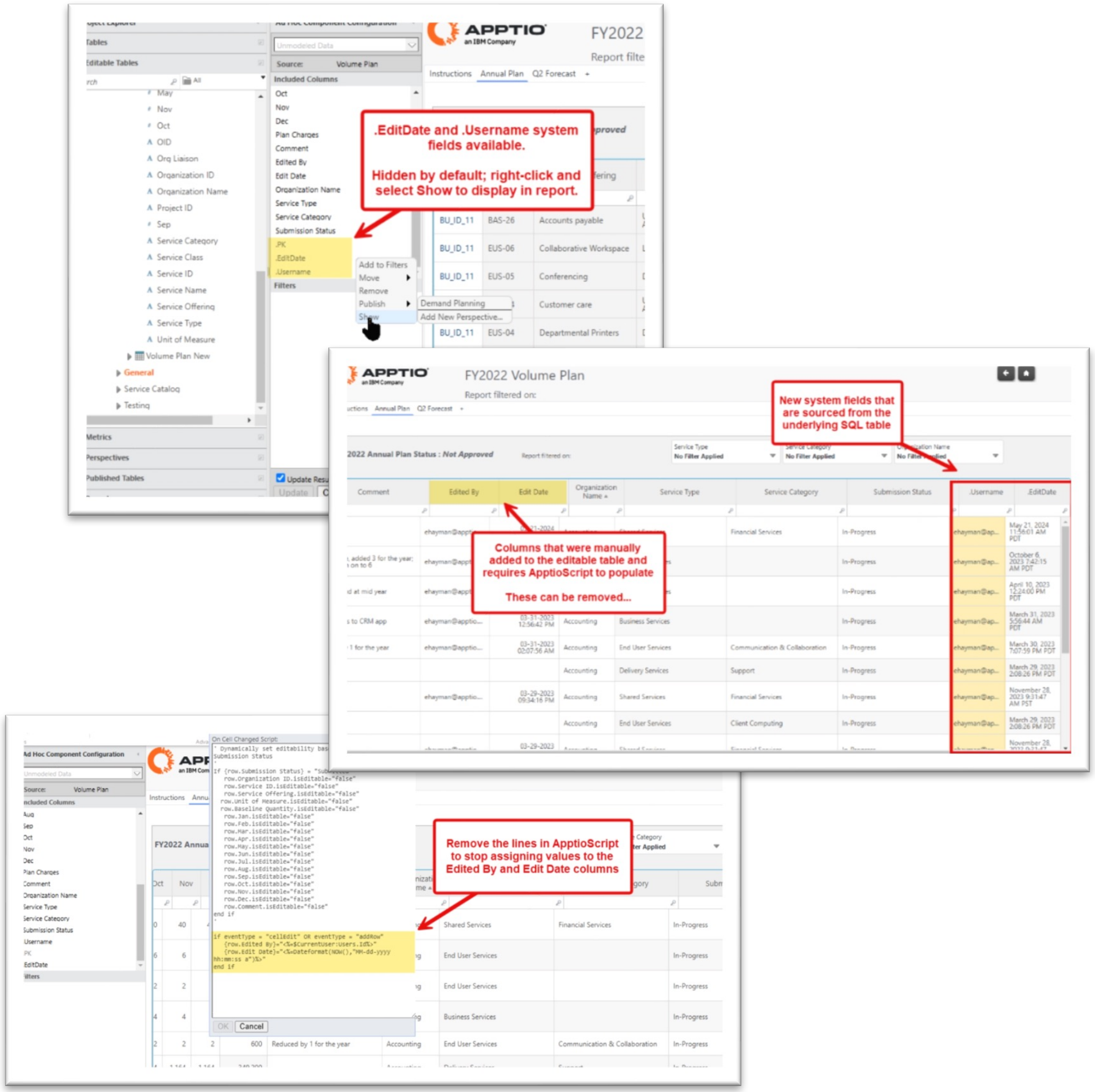
- Link with pre-applied filters
- Optional PDF attachment
- Secure, flexible sharing

Duplicate subscription

Duplicate existing email subscriptions

- Reuse pre-populated settings
- Modify before saving
- Save time by reusing existing setups

Editable Tables – Change History



New system columns for editable tables

- **.Username** and **.EditDate**

Track who changed what and when

- Supports sorting, resizing, and reordering

Flexible visibility and control

- Show or hide columns (admins and users)
- Read-only and included by default

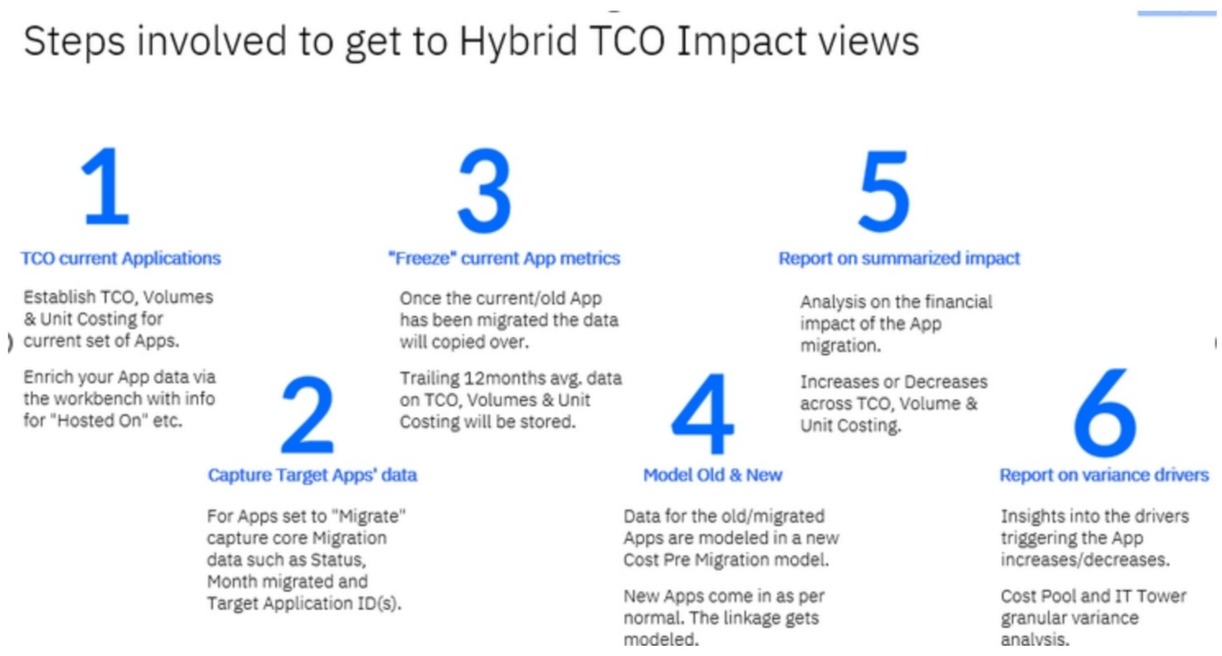
Simplifies configuration

- Removes need for custom columns and ApptioScript

Editable Tables - Create Branch with Auto-Checkout

- This enhancement introduces **auto-checkout** for editable tables in branch projects, automatically checking out tables when reports are modified or when a branch is created
- Streamlines branch workflows, prevents conflicts and unintended trunk updates
- Improves control, consistency, and productivity by eliminating manual checkouts

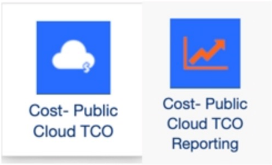
Hybrid IT TCO Impact for Costing Standard (v120)



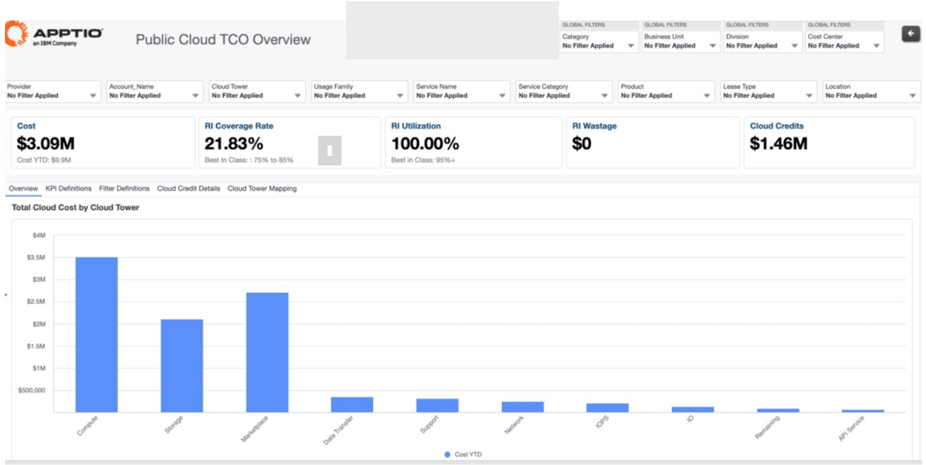
- Measures hybrid IT financial impact to drive smarter migration decisions
- Compares current vs. target footprints and analyzes migration impact to optimize hybrid IT strategy

Public Cloud TCO for Costing Standard (v120) and Costing Essentials (v200)

Template_V200 : Install “Cost- Public Cloud TCO” & “Cost- Public Cloud TCO Reporting” component in the project.



2. (IBM Studio):
Template_V120 : Install “Public Cloud TCO” component in the project.



IT finance teams: Improve public cloud cost visibility

- Transparent monthly cloud cost insights
- Helps prevent bill shock and improve accountability

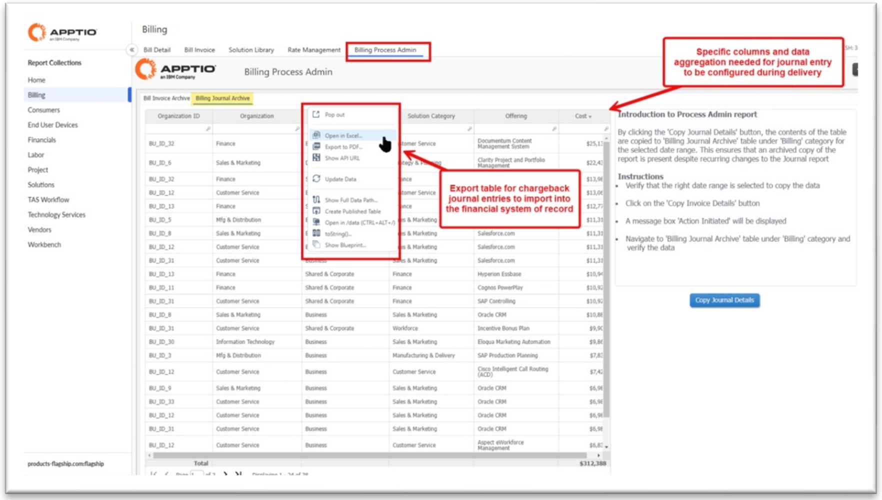
Public Cloud TCO components and reporting (v120/v200)

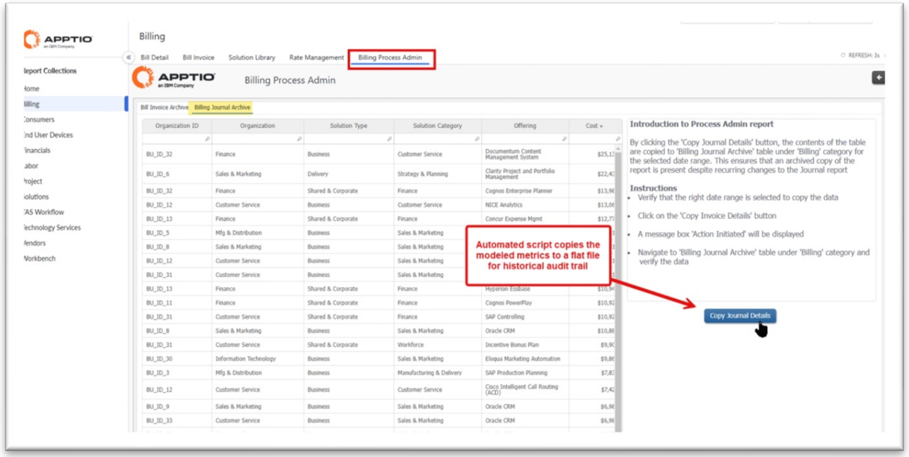
- Enables tailored analysis and optimization
- Uses cloud mapping and metrics (RI coverage, utilization)

Costing Essentials (v200)

- Introduces **Model Overview Reports** (labor, vendor, solutions, consumers, cost model) to provide a transparent view of cost flows within the model
- Reports are accessible to all users with report access (no TBM Studio needed) and allow interactive navigation by clicking fields to trace cost movement
- Targeted primarily at admins and power users to refine allocations, support decision-making, and improve cost management

Billing Essentials



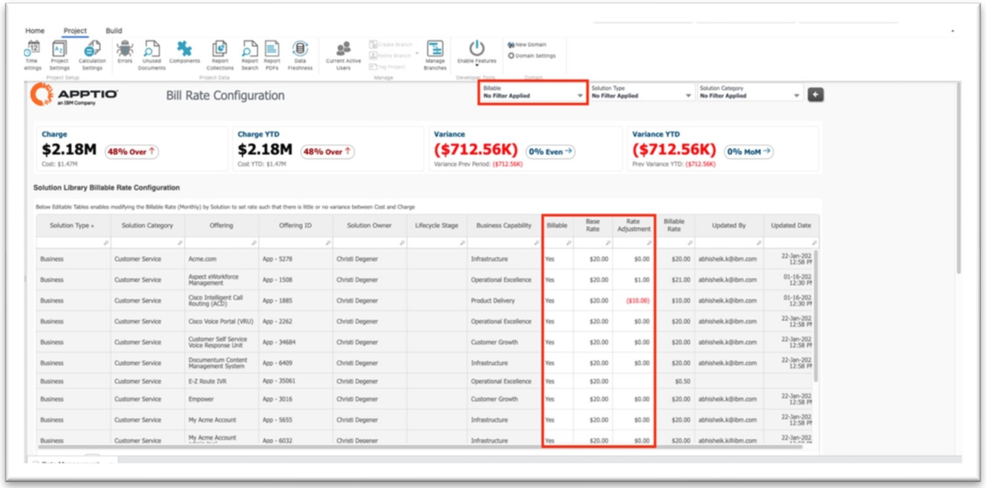


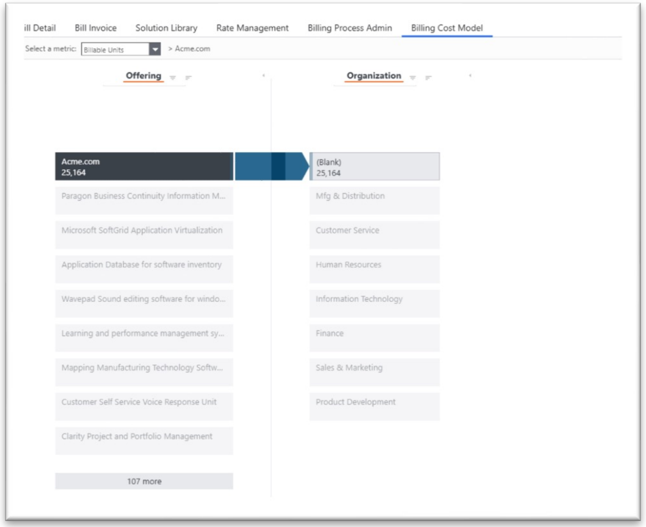
Enhanced Reporting: Billing Process Admin Report is now part of the Billing collection with RBAC-controlled access for authorized users

Journal Entry Archiving: Users can export journal entries to Excel and generate flattened tables for audit reporting

Invoice Archiving: A new Copy Invoice Details option enables secure archiving of invoices for audit and compliance

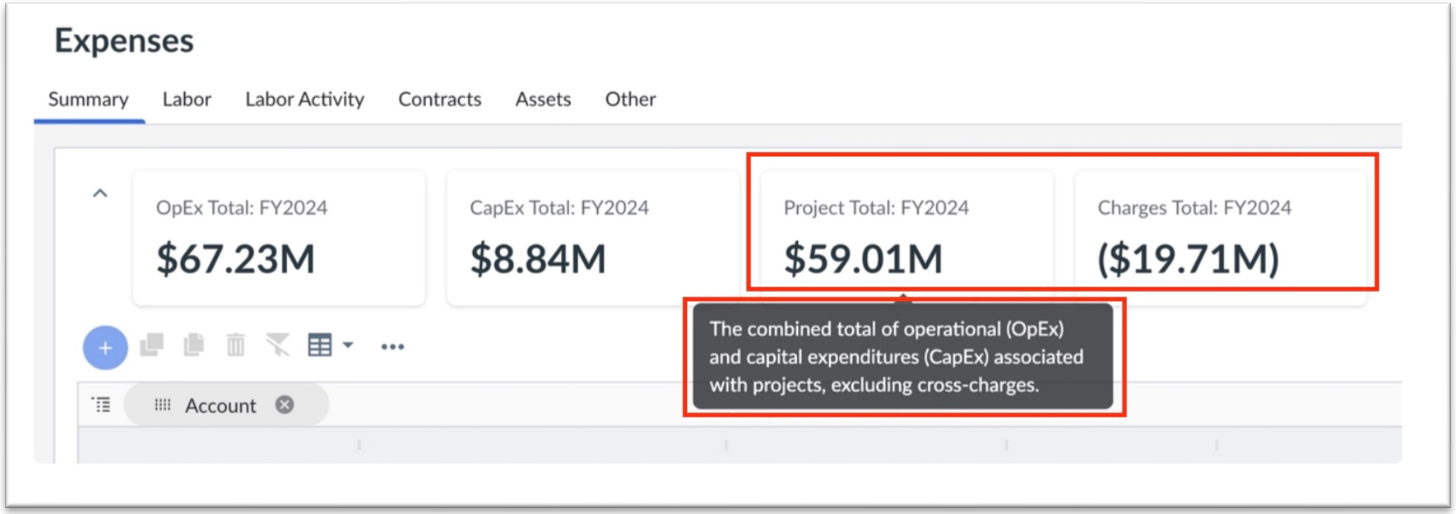
Billing Essentials (v200)





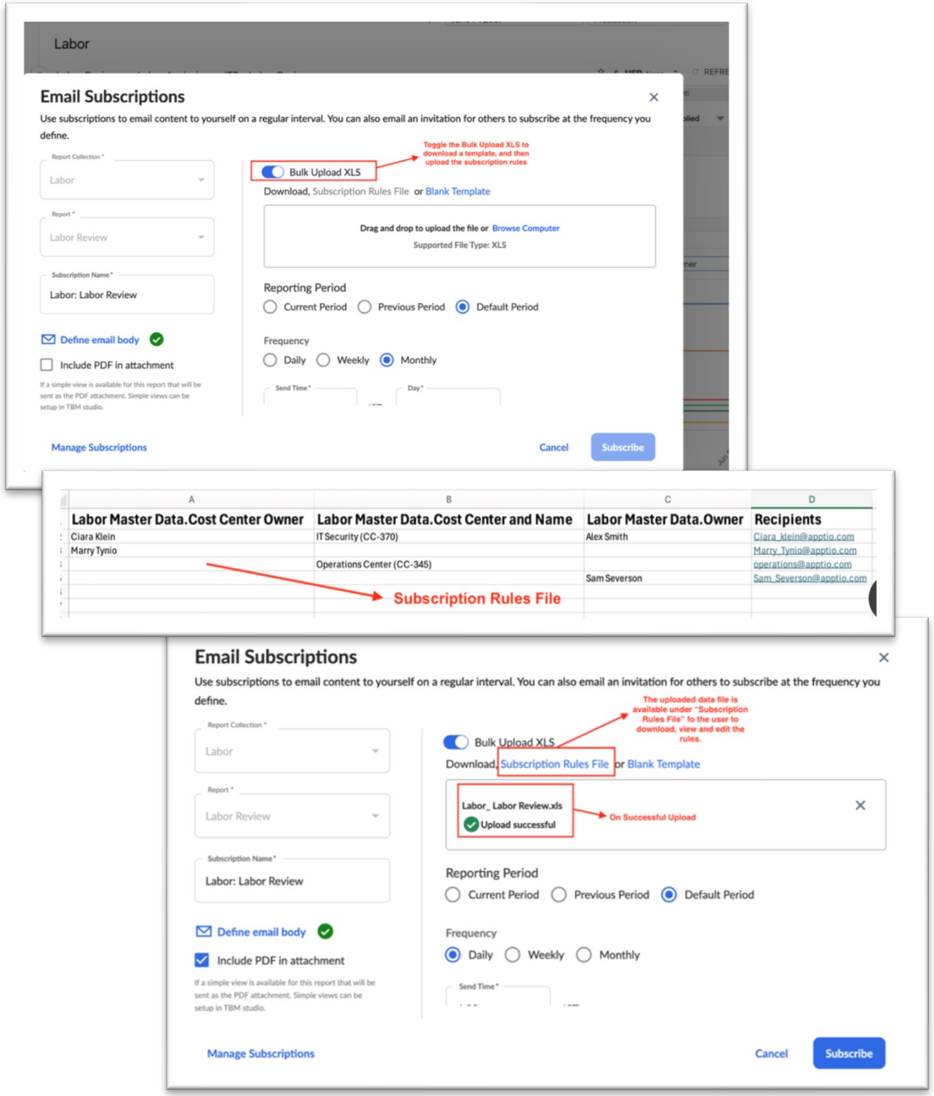
- The Rate Management report now includes a new **Rate Adjustment Impact** metric, providing additional insights into rate changes
- A new **Model Overview Report** has been added to provide a summary of key billing information

ITP – Project Expense KPIs and Tooltips



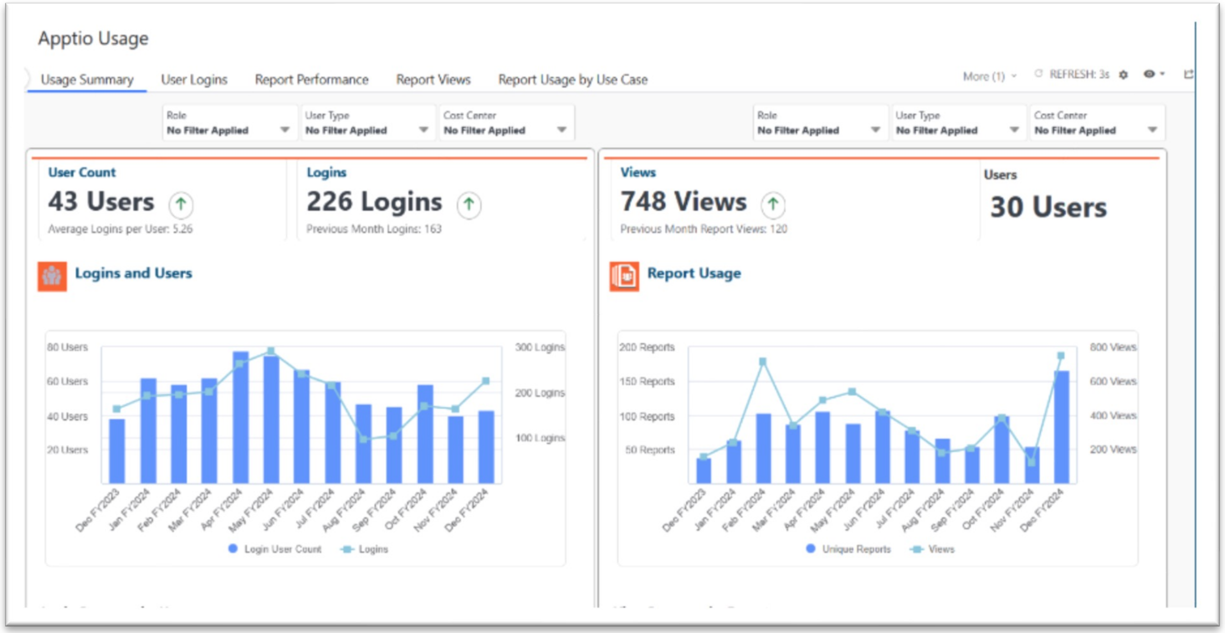
- **New KPIs added: Project Total** (OpEx + CapEx) and **Charges Total** (labor activity credits), available in Expenses page when Integrated Investment Planning is enabled
- **Tooltips introduced:** All KPIs now include in-app explanations for better clarity

Table Upload of Filtered Email Subscriptions



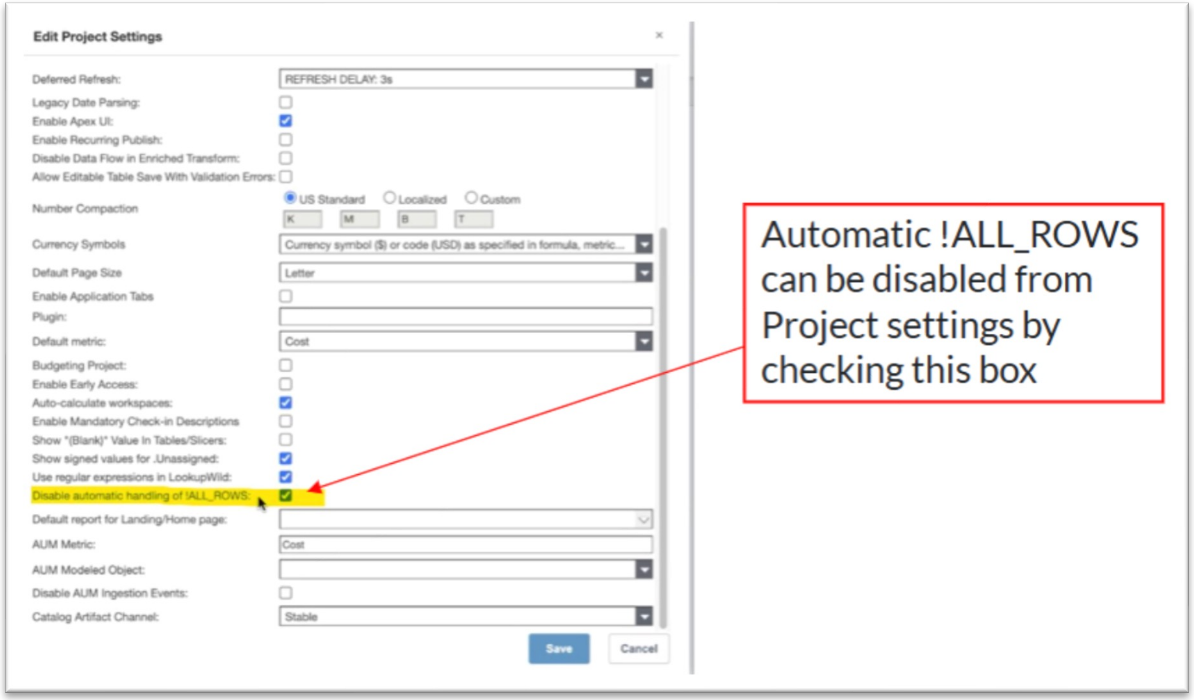
- **Bulk email distribution**: Admins can send multiple filtered report views to unique recipients without manual setup
- **Use Export → Email Subscription**, enable **Bulk Upload XLS**, download the template, add recipient/filter combinations, and upload the file
- Upon successful upload, the **Subscription Rules File** is enabled and a confirmation message is shown
  - Supports **logical AND** filtering per row
  - Validates template structure

Usage Project – Role-based Reporting on Frontdoor Persona



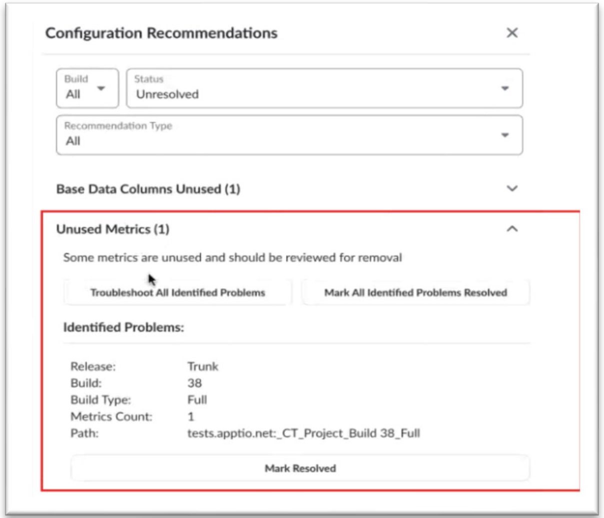
- Role-based reporting on Frontdoor personas for better user engagement and adoption
- The Apptio Usage dashboard now tracks report engagement, user activity, and performance by user roles/personas
- Helps admins identify adoption gaps and focus enablement efforts more effectively

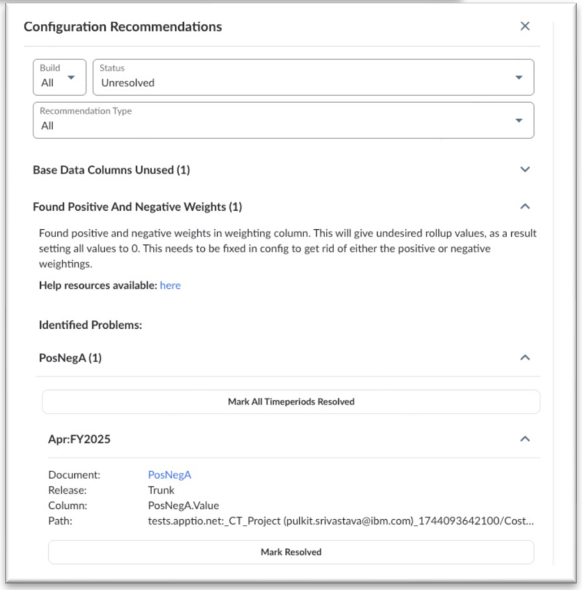
Project Settings



- Automatic **!ALL_ROWS** is enabled by default on all projects to improve reporting accuracy
- Admins can temporarily disable it in project settings if issues arise

Recommendation Workflows





Unused Metrics (Beta) - Automatically resolves unused calculated metrics via TBM Studio's Recommendations tab, with changes auto-checked in.

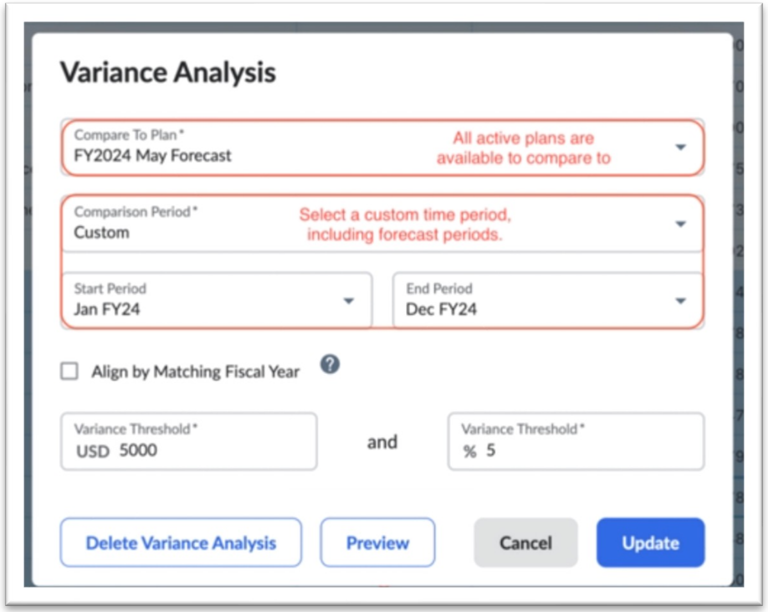
TBM Studio > **Recommendations** tab > **Unused Metrics** and then select **Troubleshoot All Identified Problems**.

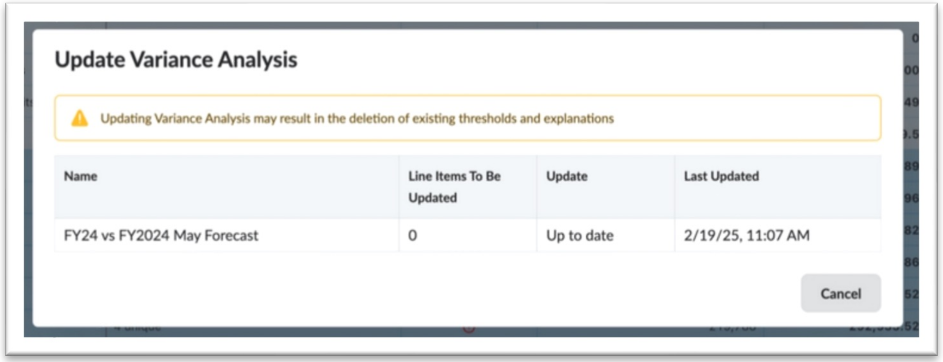
Positive and Negative Weights - This helps fix weight problems by finding and warning about mixed positive and negative weights, so you can correct them and get accurate results.

Navigate to **TBM Studio** > **Recommendations** tab, and then expand **Found Positive and Negative Weights**.

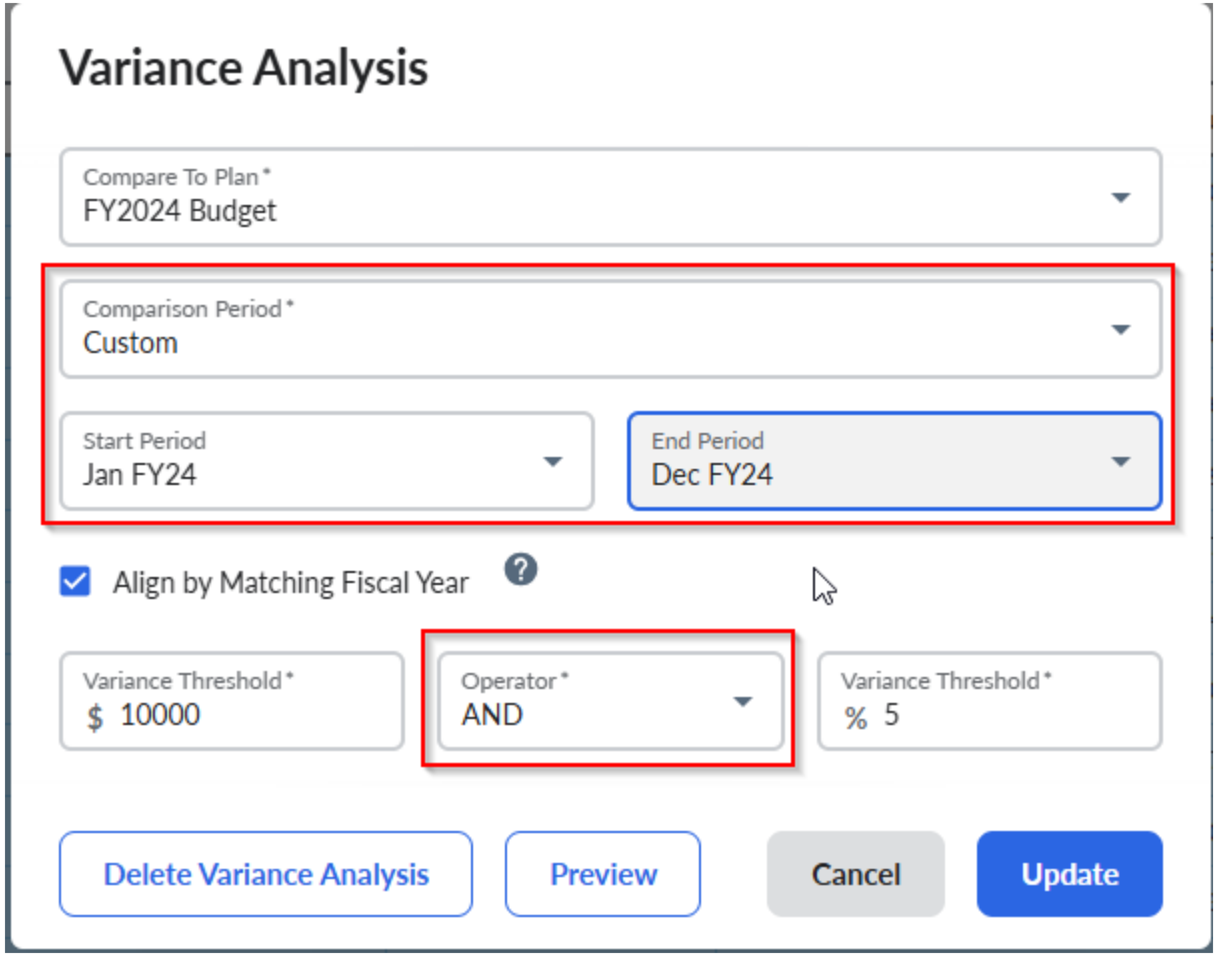
ITP - Enhanced Variance Analysis

- Admins can compare **Forecasts vs Plans** in Open and New states for any time period. (Cost Center Owners cannot view comparisons with plans in New state.)
- All active plans are available in the Compare To Plan dropdown and an option to refresh calculations using **"Update Variance Analysis."**
- An **Account Category** column is available in the table for better categorization.



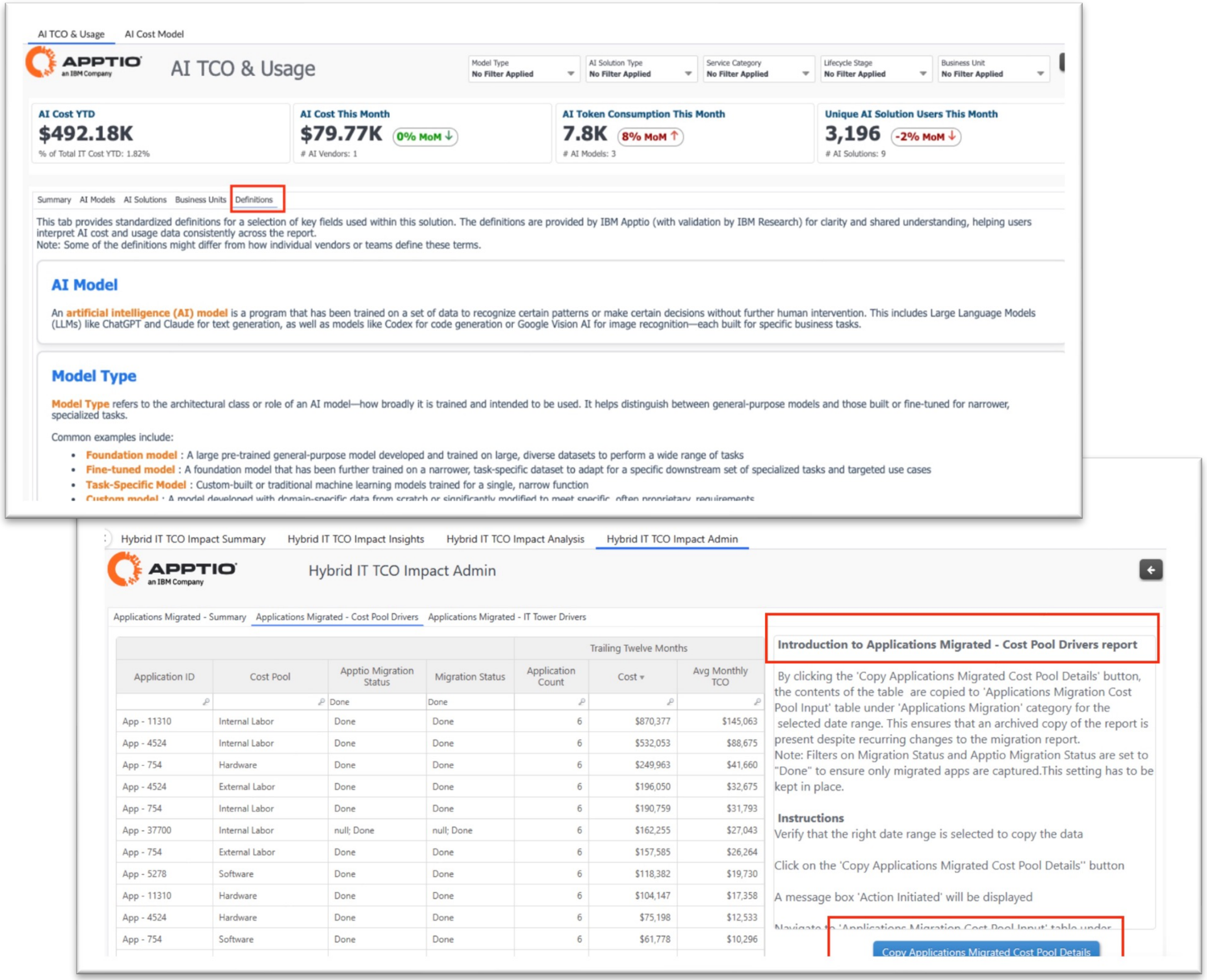


ITP Custom Variance Date Range



- Full Year Variance is now available.
- Previously, could only compare months with Actuals.
- Threshold Operator now "And/Or"

Costing Standard Enhancements (v120)

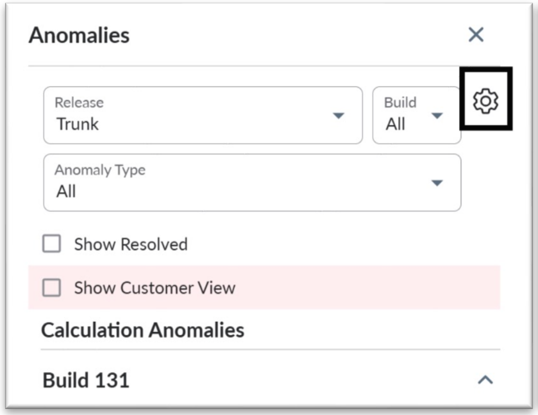


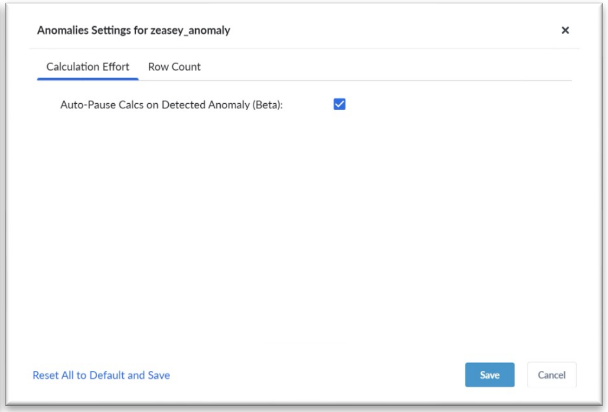
- **AI TCO & Usage:** Enhanced reports, added to Reference projects, and introduced a new Definition tab.
- **Hybrid & Mainframe TCO:** Added Detailed Trend popup and Avg Cost per App metric (Hybrid IT), plus new detail and Invoice reports for Mainframe TCO (BETA).
- **Additional Updates:** Added Application tag to Public Cloud TCO reports and introduced a new "Code" field in Planning Integration master data tables.

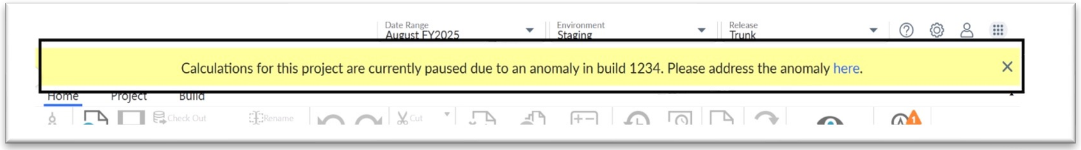
Costing Essentials Enhancements (v200)

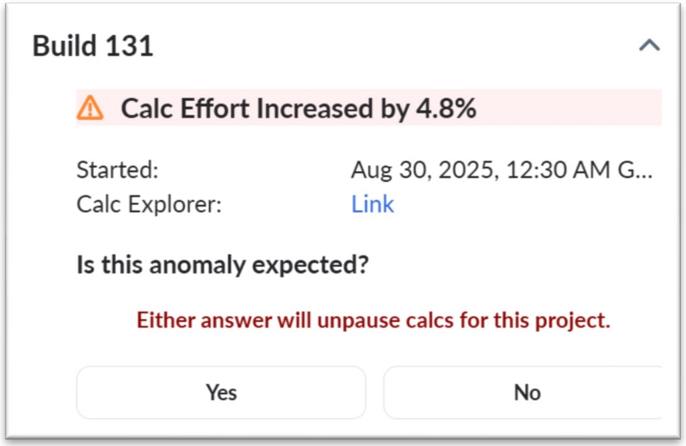
- **Usability Improvements:** Removed the 'Global' slicer, simplified End User Device reports, and added an FTE Headcount allocation strategy.
- **Reporting & Mapping Enhancements:** Added new fields to Labor, Vendor, and Organization Mapping Workbench reports; updated row count formula for TS Infrastructure & TS Platform; added Application tag to Public Cloud TCO reports.
- **Data & Model Updates:** Introduced "Code" field in Planning Integration master data tables and added depreciation metrics to the Technology Services Model.

Auto-Pause Calculation (Beta)



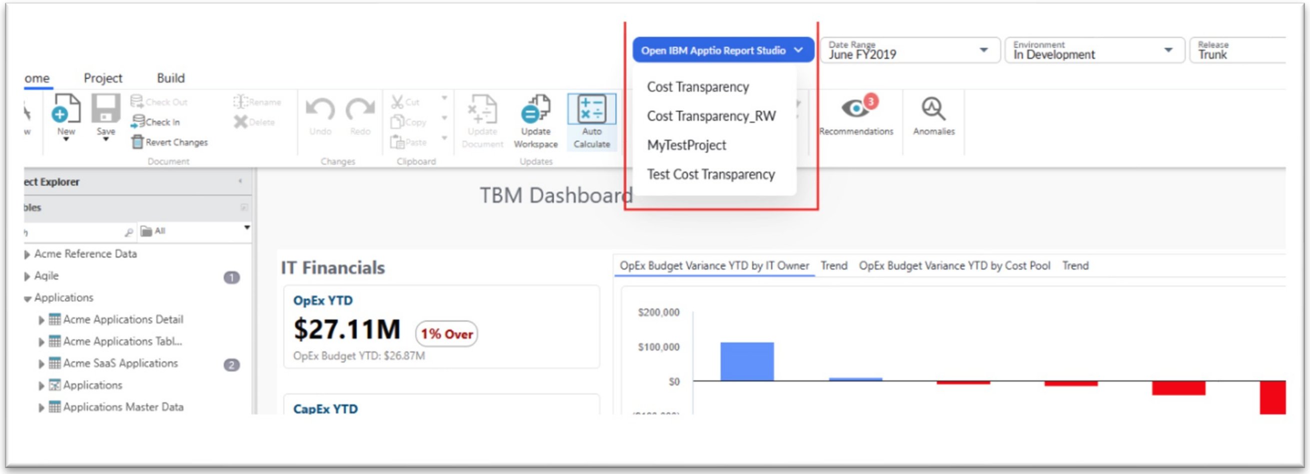






- Automatically pauses calculations when anomalies are detected, with a banner alert.
- Enable via **Anomalies → Settings → Calculation Effort → Auto-Pause Calcs on Detected Anomaly**.
- Supports two anomaly types: increased calculation effort and unusual data patterns (e.g., unexpected row counts).

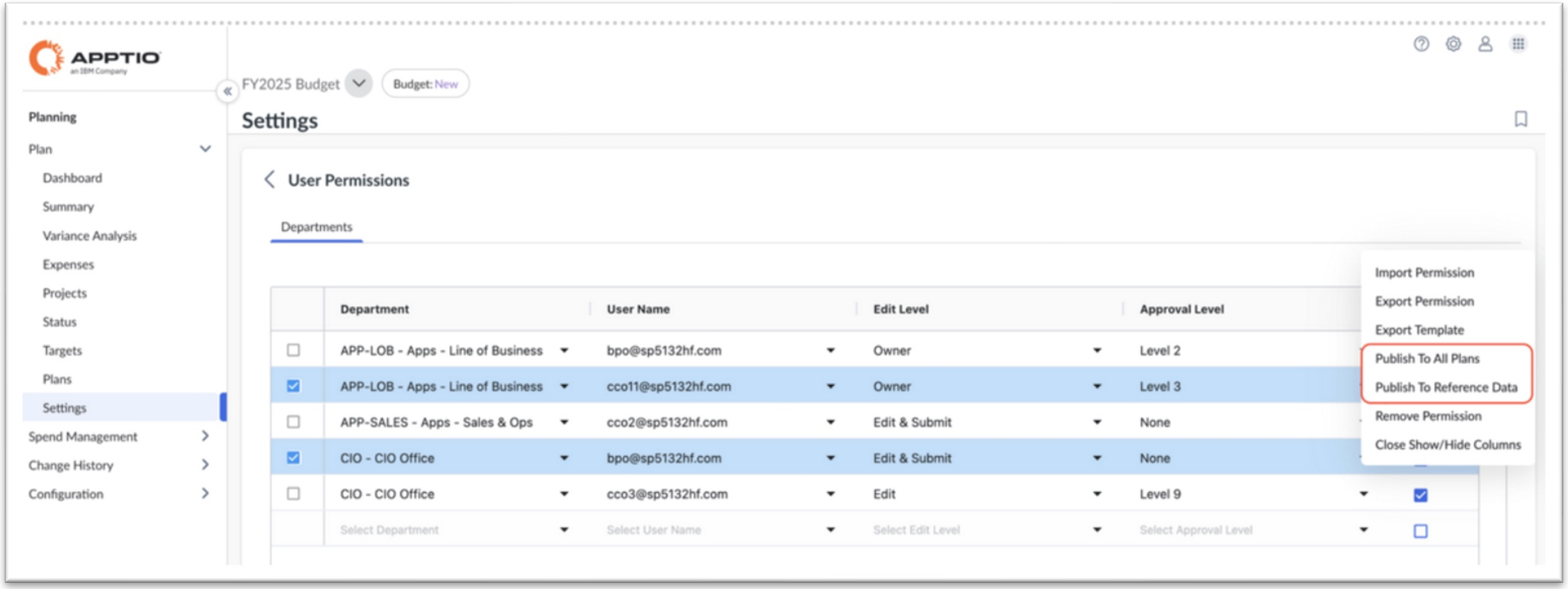
New Report Studio



- Build interactive, configurable reports with rich visualizations, filters, and multi-currency views
- Organize reports into collections and export to PDF or tables
- Built for admins (authors) and end users (viewers)

ITP New Expenses View - Updates

- Bulk publishing of user permissions across all plans or to reference data



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

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- 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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