



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

Email Subscriptions

Use subscriptions to email content to yourself on a regular interval. You can also email an invitation for others to subscribe at the frequency you define.

Report Collection *
Business Units

Report *
Business Unit Review

Subscription Name *
Business Units: Business Unit Review

Recipients *
deepali.pillal@ibm.com

Reporting Period
 Current Period Previous Period Default Period

With Filters ⓘ
 Select filtering criteria to be applied to this report when it is sent.

Send Time *
 IST Day *

Define email body ✓
 Include PDF in attachment

Manage Subscriptions Cancel Subscribe



Filtered views subscriptions

Share filtered reports via subscriptions

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

Manage Subscriptions View by user

Subscription Name	Occurrence	
<input checked="" type="checkbox"/> IT Financials: Cost Pool Analysis	At 09:00 AM on day 3 of every month IST with no end date	Edit Subscription
<input type="checkbox"/> IT Financials: Financial Review	At 07:00 AM on day 17 of every month IST until 01/17/2025	Edit Subscription



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

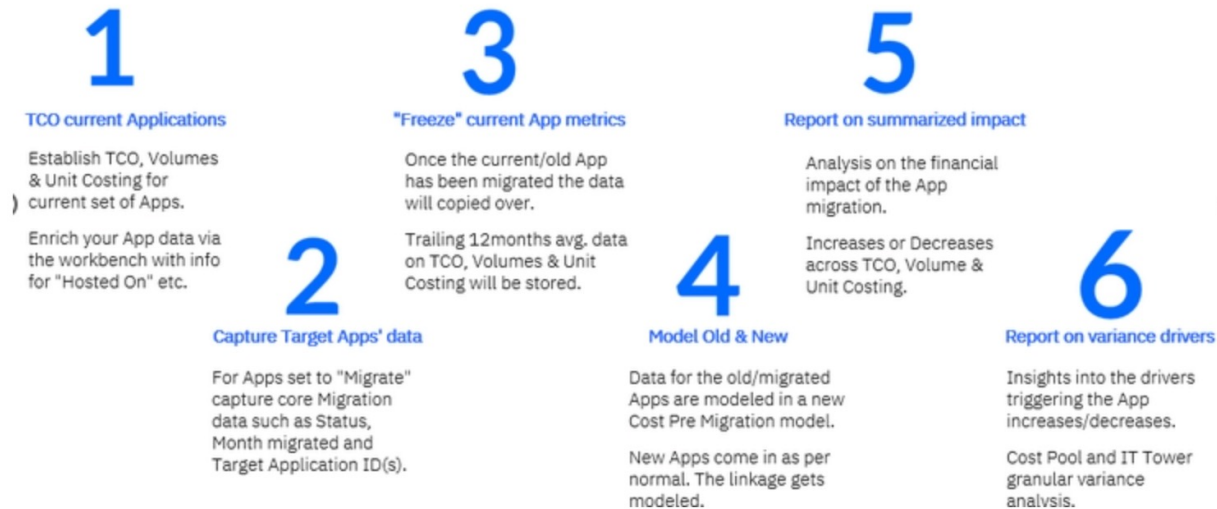
The image contains three screenshots from the APPTIO software interface. The top-left screenshot shows the 'Editable Tables' configuration panel with a red box highlighting the '.EditDate' and '.Username' fields, with a note: '.EditDate and .Username system fields available. Hidden by default; right-click and select Show to display in report.' The top-right screenshot shows a data table with a red box around the '.Username' and '.EditDate' columns, with a note: 'New system fields that are sourced from the underlying SQL table'. The bottom-left screenshot shows a table with a red box around the 'Edited By' and 'Edit Date' columns, with a note: 'Columns that were manually added to the editable table and requires ApptioScript to populate. These can be removed...'. The bottom-right screenshot shows a table with a red box around the 'Edited By' and 'Edit Date' columns, with a note: 'Remove the lines in ApptioScript to stop assigning values to the Edited By and Edit Date columns'. The background of the bottom-right screenshot shows a table with columns: Comment, Edited By, Edit Date, Organization Name, Service Type, Service Category, Submission Status, Username, and EditDate.

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)

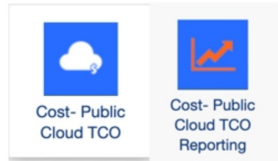
Steps involved to get to Hybrid TCO Impact views



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

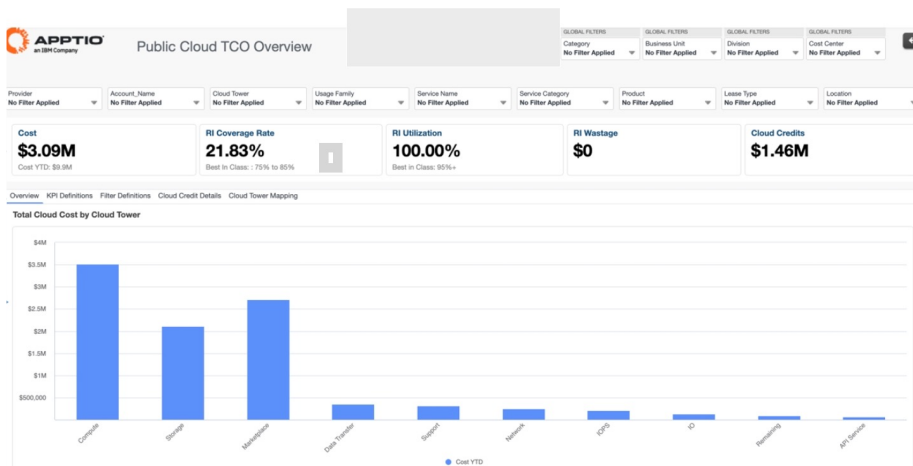
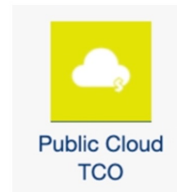
Public Cloud TCO for Costing Standard (v120) and Costing Essentials (v200)

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 (v200)

Home Project Build

APPTIO at IBM Company

Bill Rate Configuration

Charge **\$2.18M** 48% Over ↑

Charge YTD **\$2.18M** 48% Over ↑

Variance **(\$712.56K)** 0% Even →

Variance YTD **(\$712.56K)** 0% MoM →

Solution Library Billable Rate Configuration

Solution Type	Solution Category	Offering	Offering ID	Solution Owner	Lifecycle Stage	Business Capability	Billable	Base Rate	Rate Adjustment	Billable Rate	Updated By	Updated Date
Business	Customer Service	Acme.com	App - 5278	Chrvid Degener		Infrastructure	Yes	\$20.00	\$0.00	\$20.00	abfshahk@ibm.com	22-Jan-2022 12:58 PM
Business	Customer Service	Aspect ePerformance Management	App - 1308	Chrvid Degener		Operational Excellence	Yes	\$20.00	\$1.00	\$21.00	abfshahk@ibm.com	01-Feb-2022 12:30 PM
Business	Customer Service	Cloud Intelligent Call Routing (CICR)	App - 1885	Chrvid Degener		Product Delivery	Yes	\$20.00	(\$10.00)	\$10.00	abfshahk@ibm.com	01-Feb-2022 12:30 PM
Business	Customer Service	Cloud Workspace Portal (WSP)	App - 2362	Chrvid Degener		Operational Excellence	Yes	\$20.00	\$0.00	\$20.00	abfshahk@ibm.com	22-Jan-2022 12:58 PM
Business	Customer Service	Customer Self Service Voice Response Unit	App - 3494	Chrvid Degener		Customer Growth	Yes	\$20.00	\$0.00	\$20.00	abfshahk@ibm.com	22-Jan-2022 12:58 PM
Business	Customer Service	Documentum Content Management System	App - 6409	Chrvid Degener		Infrastructure	Yes	\$20.00	\$0.00	\$20.00	abfshahk@ibm.com	22-Jan-2022 12:58 PM
Business	Customer Service	E-2 Route DR	App - 30661	Chrvid Degener		Operational Excellence	Yes	\$20.00	\$0.00	\$20.00	abfshahk@ibm.com	22-Jan-2022 12:58 PM
Business	Customer Service	Empower	App - 3016	Chrvid Degener		Customer Growth	Yes	\$20.00	\$0.00	\$20.00	abfshahk@ibm.com	22-Jan-2022 12:58 PM
Business	Customer Service	My Acme Account	App - 3653	Chrvid Degener		Infrastructure	Yes	\$20.00	\$0.00	\$20.00	abfshahk@ibm.com	22-Jan-2022 12:58 PM
Business	Customer Service	My Acme Account	App - 6032	Chrvid Degener		Infrastructure	Yes	\$20.00	\$0.00	\$20.00	abfshahk@ibm.com	22-Jan-2022 12:58 PM

➤ The Rate Management report now includes a new **Rate Adjustment Impact** metric, providing additional insights into rate changes

Bill Detail Bill Invoice Solution Library Rate Management Billing Process Admin Billing Cost Model

Select a metric: [Blank Units] > Acme.com

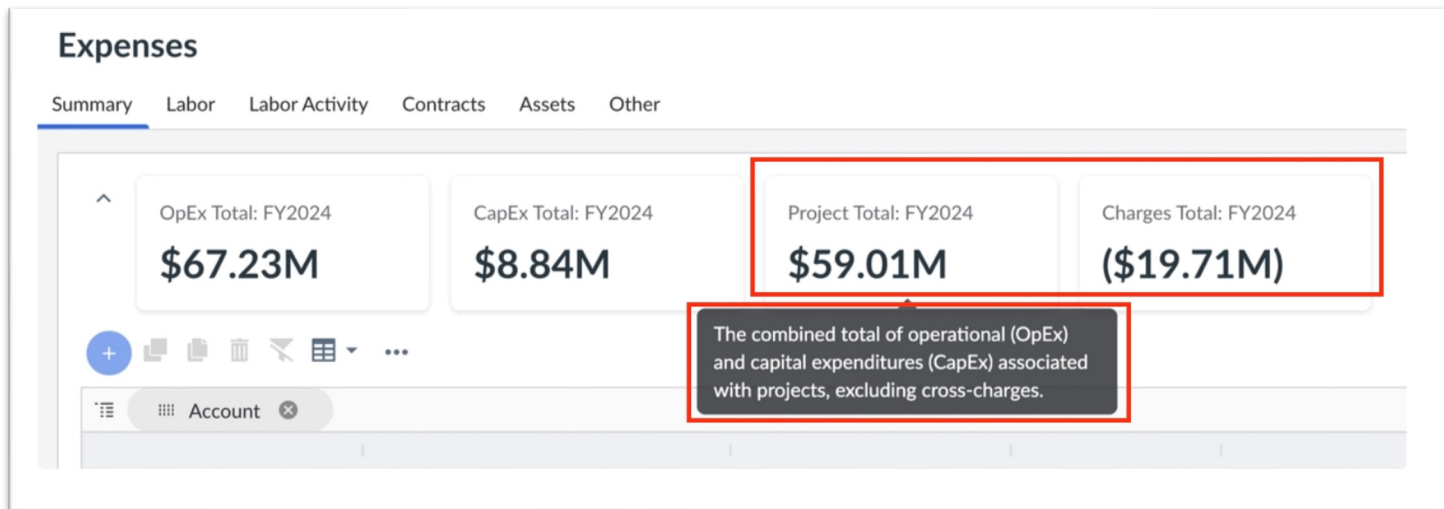
Offering Organization

Offering	Organization
Acme.com 22,164	(Blank) 25,164
Paragon Business Continuity Information M...	Mfg & Distribution
Microsoft SoftGrid Application Virtualization	Customer Service
Application Database for software inventory	Human Resources
Wavepad Sound editing software for winds...	Information Technology
Learning and performance management sy...	Finance
Mapping Manufacturing Technology Softe...	Sales & Marketing
Customer Self Service Voice Response Unit	Product Development
Clarity Project and Portfolio Management	

107 more

➤ 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

The screenshot shows the 'Email Subscriptions' dialog box. The 'Bulk Upload XLS' option is selected. A red arrow points to the 'Bulk Upload XLS' toggle with the text: 'Toggle the Bulk Upload XLS to download a template, and then upload the subscription rules.' Below this, there is a 'Download, Subscription Rules File or Blank Template' button. A red arrow points to the 'Subscription Rules File' link in the download options. The 'Report' dropdown is set to 'Labor Review'. The 'Reporting Period' is set to 'Default Period'. The 'Frequency' is set to 'Monthly'. The 'Send Time' is set to '... .. Day *'. The 'Define email body' checkbox is checked. The 'Include PDF in attachment' checkbox is checked. The 'Subscribe' button is visible at the bottom right.

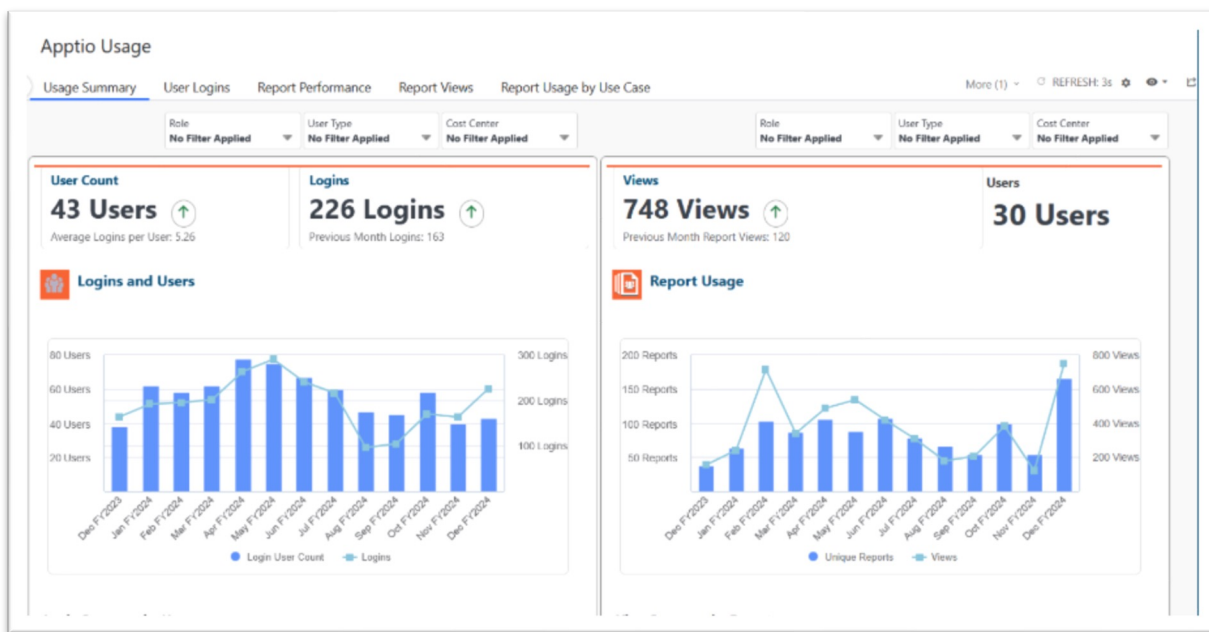
A	B	C	D
Labor Master Data.Cost Center Owner	Labor Master Data.Cost Center and Name	Labor Master Data.Owner	Recipients
Clara Klein	IT Security (CC-370)	Alex Smith	Clara_Klein@apptio.com
Mary Tymio	Operations Center (CC-345)	Sam Severson	Mary_Tymio@apptio.com operations@apptio.com Sam_Severson@apptio.com

A red arrow points from the 'Subscription Rules File' link in the table to the 'Subscription Rules File' link in the dialog box.

The second screenshot shows the 'Email Subscriptions' dialog box with the 'Bulk Upload XLS' option selected. A red arrow points to the 'Bulk Upload XLS' toggle with the text: 'The uploaded data file is available under "Subscription Rules File" to the user to download, view and edit the rules.' Below this, there is a 'Download, Subscription Rules File or Blank Template' button. A red arrow points to the 'Subscription Rules File' link in the download options. The 'Report' dropdown is set to 'Labor Review'. The 'Reporting Period' is set to 'Default Period'. The 'Frequency' is set to 'Monthly'. The 'Send Time' is set to '... .. Day *'. The 'Define email body' checkbox is checked. The 'Include PDF in attachment' checkbox is checked. The 'Subscribe' button is visible at the bottom right. A confirmation message is shown: 'Labor_Labor Review.xls Upload successful' with a green checkmark and the text 'On Successful Upload'.

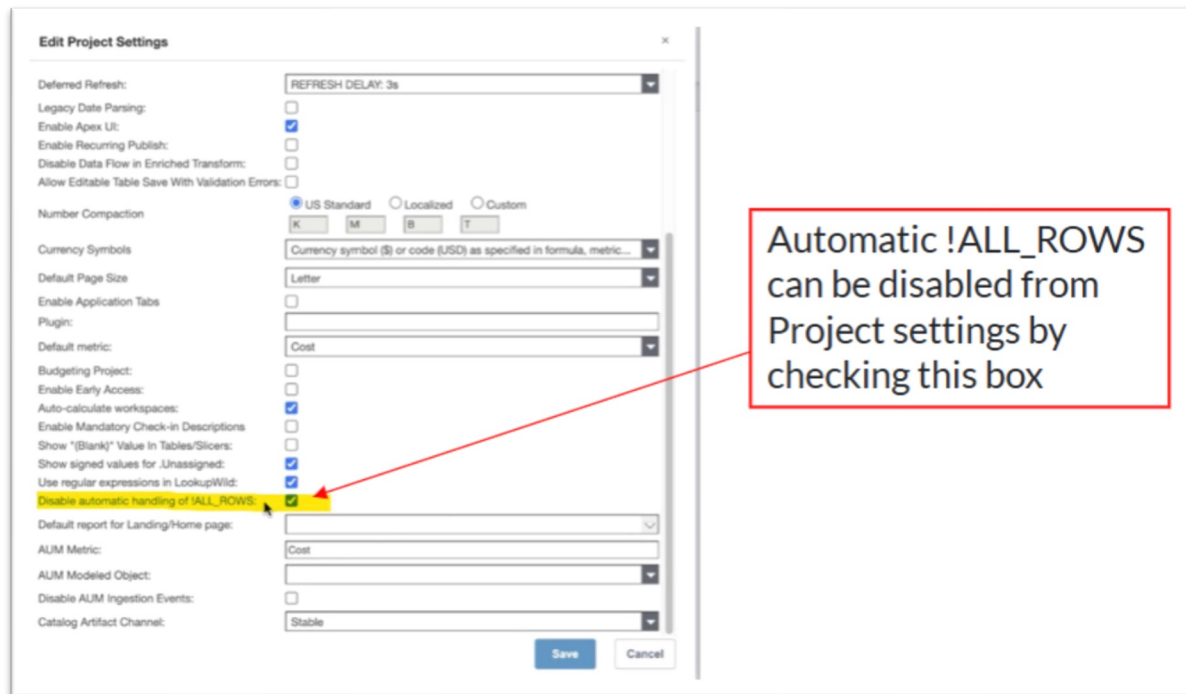
- **Bulk email distribution:** Admins can send multiple filtered report views to unique recipients without manual setup
- **Use Export → Email Subscription,** enable **Bulk Upload XLS**, download the template, add recipient/filter combinations, and upload the file
- Upon successful upload, the **Subscription 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



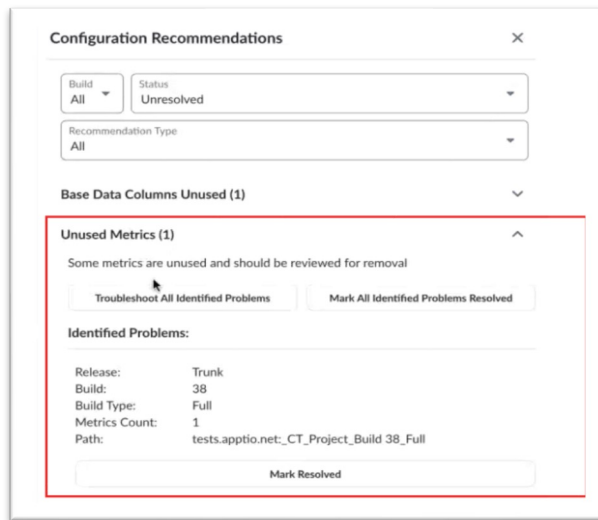
- Role-based reporting on Frontdoor personas for better user engagement and adoption
- The Apptio Usage dashboard now tracks report engagement, user activity, and performance by user roles/personas
- Helps admins identify adoption gaps and focus enablement efforts more effectively

Project Settings



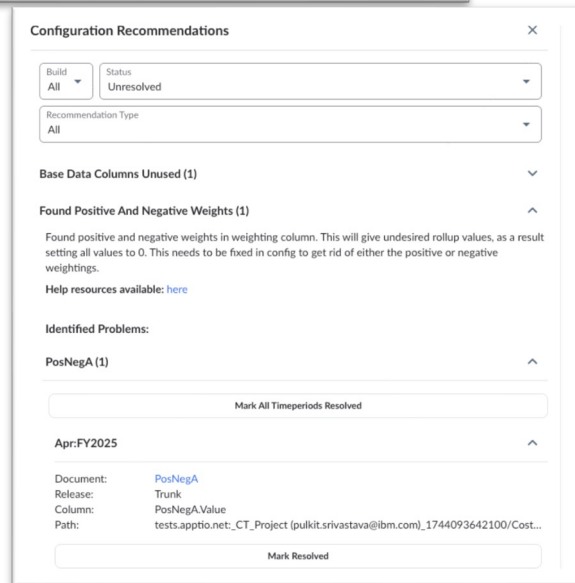
- Automatic **!ALL_ROWS** is enabled by default on all projects to improve reporting accuracy
- Admins can temporarily disable it in project settings if issues arise

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.

Variance Analysis

Compare To Plan*
FY2024 May Forecast All active plans are available to compare to

Comparison Period*
Custom Select a custom time period, including forecast periods.

Start Period
Jan FY24

End Period
Dec FY24

Align by Matching Fiscal Year

Variance Threshold*
USD 5000

and

Variance Threshold*
% 5

[Delete Variance Analysis](#) [Preview](#) [Cancel](#) [Update](#)

Update Variance Analysis

⚠ Updating Variance Analysis may result in the deletion of existing thresholds and explanations

Name	Line Items To Be Updated	Update	Last Updated
FY24 vs FY2024 May Forecast	0	Up to date	2/19/25, 11:07 AM

[Cancel](#)

ITP Custom Variance Date Range

Variance Analysis

Compare To Plan*
FY2024 Budget

Comparison Period*
Custom

Start Period
Jan FY24

End Period
Dec FY24

Align by Matching Fiscal Year ?

Variance Threshold*
\$ 10000

Operator*
AND

Variance Threshold*
% 5

Delete Variance Analysis Preview Cancel Update

→ Full Year Variance is now available.

→ Previously, could only compare months with Actuals.

→ Threshold Operator now "And/Or"

Costing Standard Enhancements (v120)

The screenshot shows the APPTIO AI TCO & Usage dashboard. Key metrics include:

- AI Cost YTD:** \$492.18K (1.82% of Total IT Cost YTD)
- AI Cost This Month:** \$79.77K (0% MoM)
- AI Token Consumption This Month:** 7.8K (8% MoM)
- Unique AI Solution Users This Month:** 3,196 (-2% MoM)

The **Definitions** tab is highlighted, providing standardized definitions for key fields used within the solution. It includes sections for **AI Model** and **Model Type**.

AI Model: An artificial intelligence (AI) model is a program that has been trained on a set of data to recognize certain patterns or make certain decisions without further human intervention. This includes Large Language Models (LLMs) like ChatGPT and Claude for text generation, as well as models like Codex for code generation or Google Vision AI for image recognition—each built for specific business tasks.

Model Type: Model Type refers to the architectural class or role of an AI model—how broadly it is trained and intended to be used. It helps distinguish between general-purpose models and those built or fine-tuned for narrower, specialized tasks.

Common examples include:

- Foundation model:** A large pre-trained general-purpose model developed and trained on large, diverse datasets to perform a wide range of tasks
- Fine-tuned model:** A foundation model that has been further trained on a narrower, task-specific dataset to adapt for a specific downstream set of specialized tasks and targeted use cases
- Task-Specific Model:** Custom-built or traditional machine learning models trained for a single, narrow function
- Custom model:** A model developed with domain-specific data from scratch or significantly modified to meet specific, often non-standard, requirements

➤ **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.

The screenshot shows the APPTIO Hybrid IT TCO Impact Admin report. The **Introduction to Applications Migrated - Cost Pool Drivers report** is highlighted. The report includes a table with the following columns: Application ID, Cost Pool, Apptio Migration Status, Migration Status, Application Count, Cost, and Avg Monthly TCO.

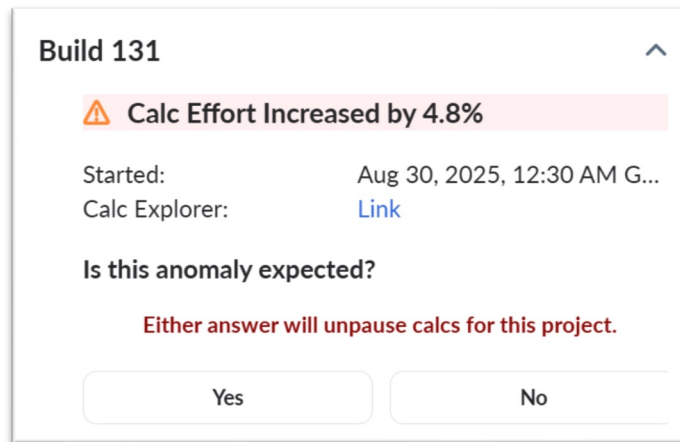
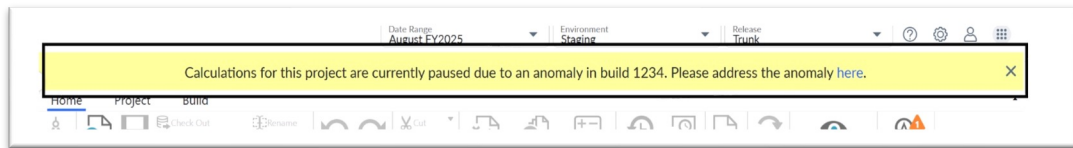
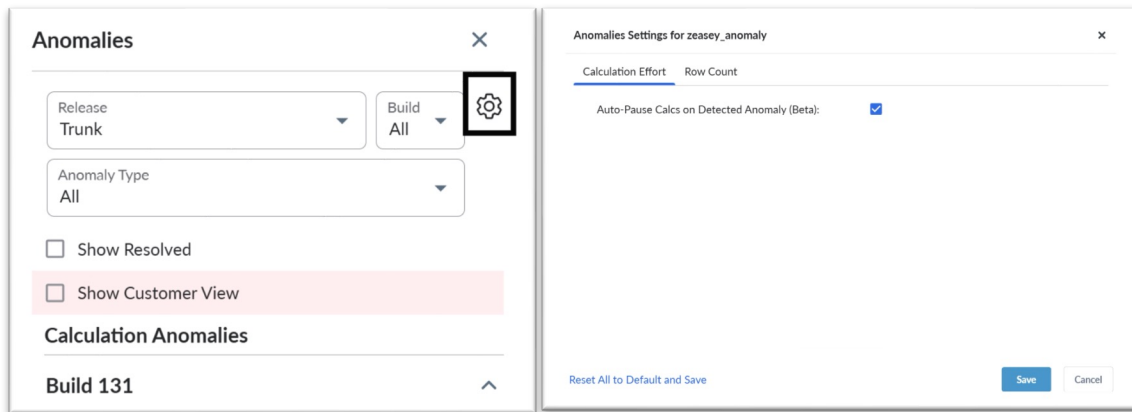
Application ID	Cost Pool	Apptio Migration Status	Migration Status	Application Count	Cost	Avg Monthly TCO
App - 11310	Internal Labor	Done	Done	6	\$870,377	\$145,063
App - 4524	Internal Labor	Done	Done	6	\$532,053	\$88,675
App - 754	Hardware	Done	Done	6	\$249,963	\$41,660
App - 4524	External Labor	Done	Done	6	\$196,050	\$32,675
App - 754	Internal Labor	Done	Done	6	\$190,759	\$31,793
App - 37700	Internal Labor	null: Done	null: Done	6	\$162,255	\$27,043
App - 754	External Labor	Done	Done	6	\$157,585	\$26,264
App - 5278	Software	Done	Done	6	\$118,382	\$19,730
App - 11310	Hardware	Done	Done	6	\$104,147	\$17,358
App - 4524	Hardware	Done	Done	6	\$75,198	\$12,533
App - 754	Software	Done	Done	6	\$61,778	\$10,296

The report also includes instructions for copying the data and a button to **Copy Applications Migrated Cost Pool Details**.

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.

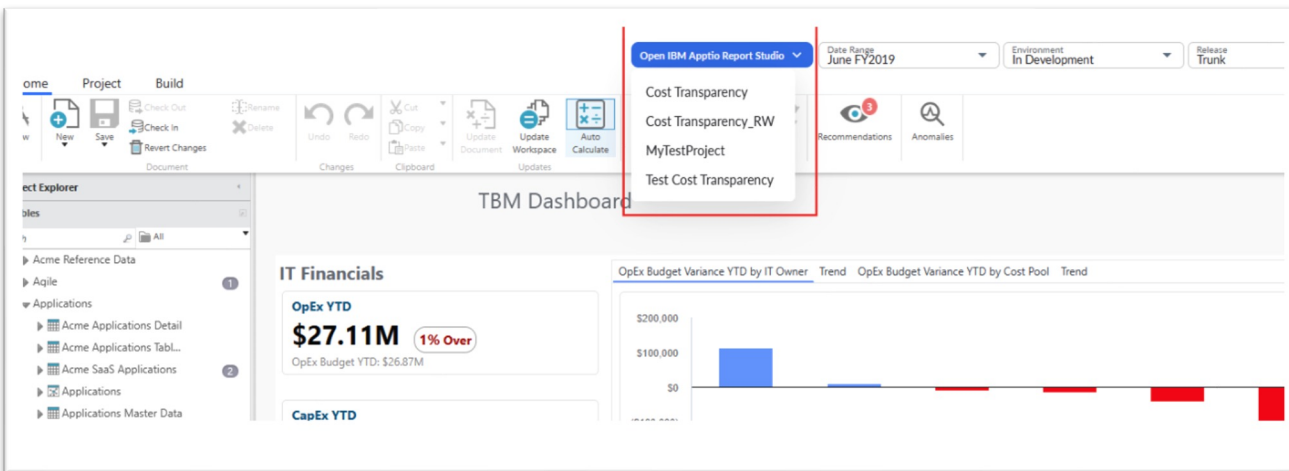
Auto-Pause Calculation (Beta)



- 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

The screenshot shows the APPTIO user permissions settings interface. The left sidebar contains navigation options: Planning, Plan, Dashboard, Summary, Variance Analysis, Expenses, Projects, Status, Targets, Plans, Settings (highlighted), Spend Management, Change History, and Configuration. The main content area is titled 'Settings' and 'User Permissions'. Under the 'Departments' tab, a table lists user permissions for various departments. A context menu is open over the table, highlighting the 'Publish To All Plans' and 'Publish To Reference Data' options.

	Department	User Name	Edit Level	Approval Level	
<input type="checkbox"/>	APP-LOB - Apps - Line of Business	bpo@sp5132hf.com	Owner	Level 2	
<input checked="" type="checkbox"/>	APP-LOB - Apps - Line of Business	cco11@sp5132hf.com	Owner	Level 3	
<input type="checkbox"/>	APP-SALES - Apps - Sales & Ops	cco2@sp5132hf.com	Edit & Submit	None	
<input checked="" type="checkbox"/>	CIO - CIO Office	bpo@sp5132hf.com	Edit & Submit	None	
<input type="checkbox"/>	CIO - CIO Office	cco3@sp5132hf.com	Edit	Level 9	<input checked="" type="checkbox"/>
	Select Department	Select User Name	Select Edit Level	Select Approval Level	<input type="checkbox"/>

Context Menu Options:

- Import Permission
- Export Permission
- Export Template
- Publish To All Plans**
- Publish To Reference Data**
- Remove Permission
- Close Show/Hide Columns

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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