



EDUCATION SERVICES

APPTIO UNIVERSITY

Elite TBMA Case Study Submission

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Drove business value using Apptio

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Created streamlined and personalized reporting for business owners through the addition of Row Level Security and Cost Transparency reporting.

Before

- Costs obtained via manual work from various excel files and multiple sources
- Limited transparency and accountability for spend as difficult to obtain user details
- IT Leaders unable to adjust forecasts for any unplanned expenses without Finance

vs.

After

- One stop shop for Financials for multiple teams across organization
- Fully transparent spend with ability to drill into reporting at a granular level
- Leaders can adjust for additional spend and address variances as they arise



Procedures

We elected to use Apptio to consolidate all our reporting into one source while mapping spend for Labor, Contract, Vendor and OpEx by Cost Center. This new transparency allowed us to ensure that all spend was correctly allocated by ownership and usage for key Business / Financial statistics tailored to each business owner's interests.

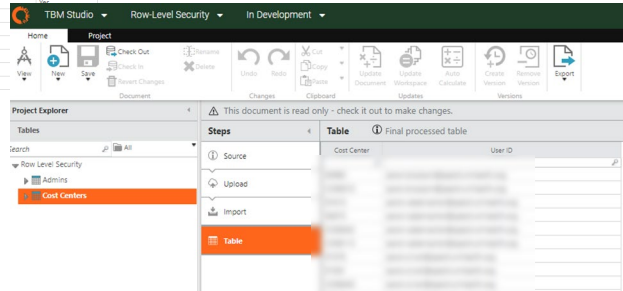
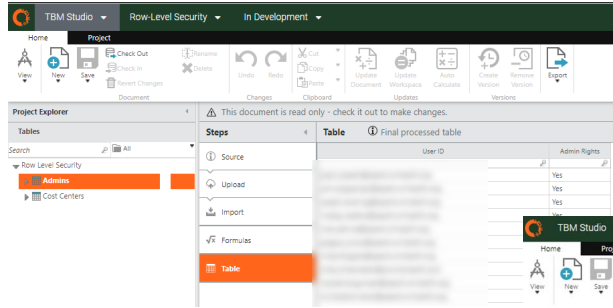
In order to ensure all our users could get the most detail out of our data, we elected to apply Row Level Security to our reports. This decision allowed our users to be self sufficient and review details specific to areas of business that they are responsible for or own.

Following the completion of our configuration, we now have monthly reports available for each business owner with their current personalized spend details. These personalized reports have allowed us to identify and explain variances while helping identify and address any unfavorable budget variances.



Procedures

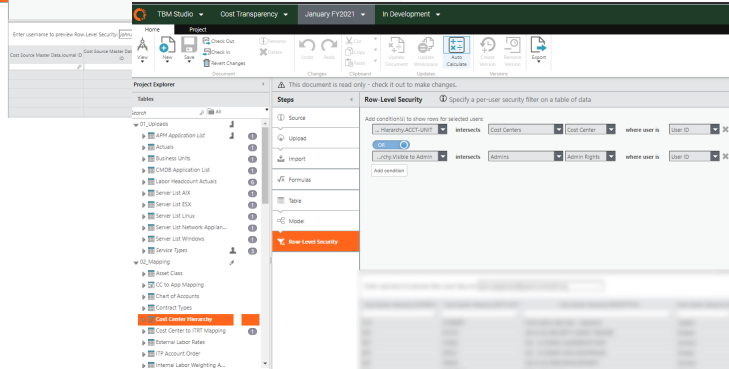
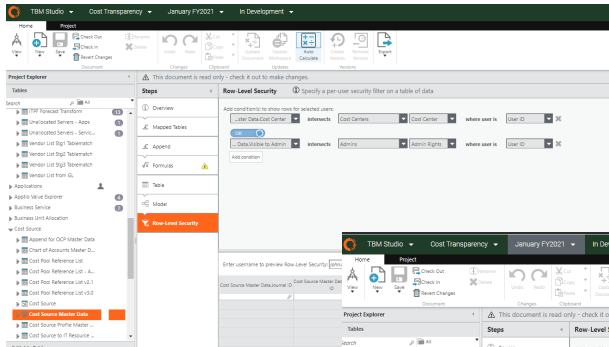
Created RLS with (1) users who have admin rights with no restrictions and (2) users who only have viewing rights to specific cost centers they own





Procedures

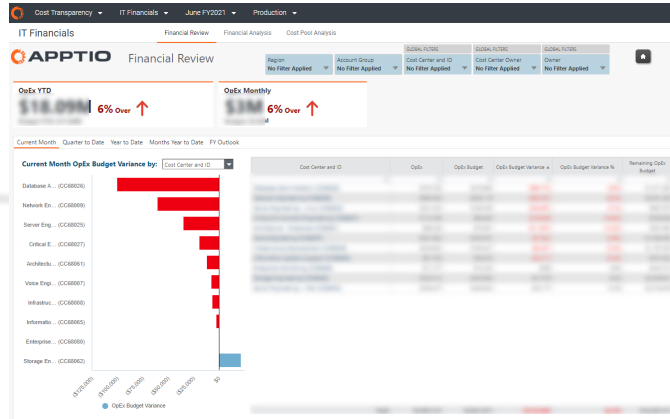
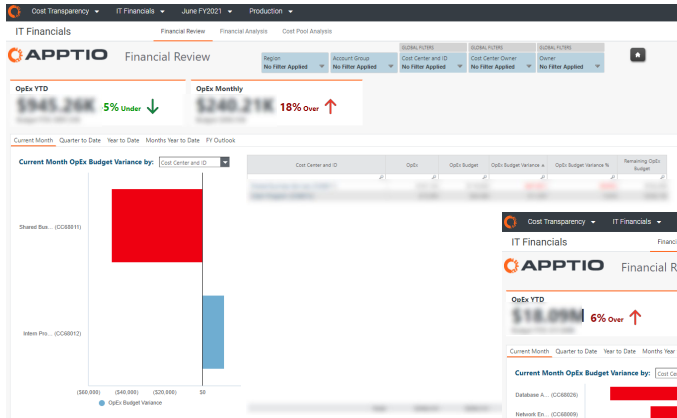
Applied RLS to reports within CT





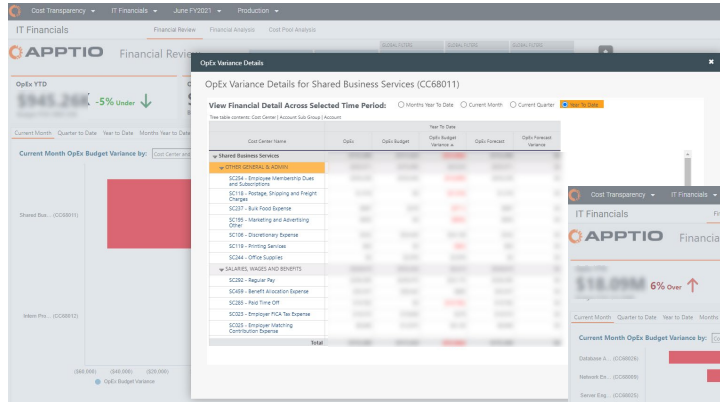
Procedures

RLS filtering allows for custom reports relevant to each user showing detailed spend specifics

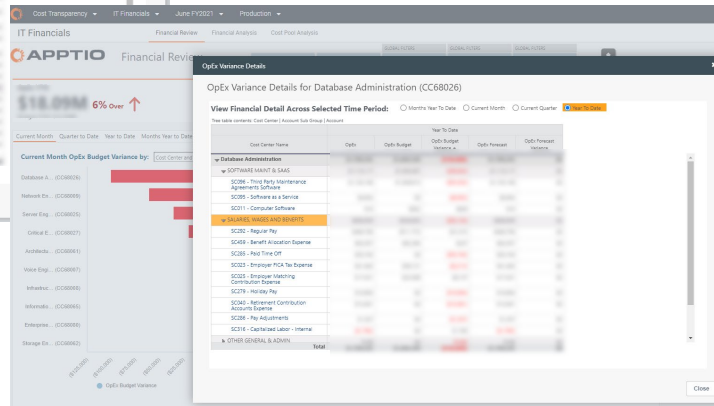




Procedures



RLS filtering allows for custom reports relevant to each user showing detailed spend specifics





Results



Decreased reporting review time

Decreased unjustified spend variances

Decreased manual reporting requests



Increased spend understanding and engagement

Increased collaboration and communication regarding variances



Lessons Learned

- Custom Roles work well to restrict access by environments and applications, but Row Level Security provides the most control over content
- Tailor CT reporting to work for all levels of the organization and use RLS to ensure data is filtered appropriately within each report for each user
- If needed, RLS allows for the creation of “admin” users that can view everything without restriction
- Reports can be locked down within CT by roles, allowing admins to restrict access to unfinished reports, while allowing access to those that are completed and ready to be leveraged by users

THANK YOU