Brazil Enterprise Architecture

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Company Headquarters
2225 Lawson Lane
Santa Clara, CA 95054
United States
(408) 501-8550

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Enterprise Architecture

The ServiceNow® Enterprise Architecture unites strategic and operational teams, enabling organizations to achieve their business objectives. It serves as a powerful decision engine, combining robust modeling with the management of business capabilities, application portfolios, information portfolios, and technology portfolios.

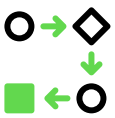
Enterprise Architecture helps enterprise architects manage business applications as part of an enterprise architecture practice focused on strategic planning, rationalization, and transformation.

Enterprise Architecture helps you decide whether to invest, sustain, or replace applications based on the business need aligned toward the organization goal.

You can address business challenges such as:

- Redundant applications for similar functions.
- Increasing cost of owning and maintaining applications.
- Increasing demand to upgrade the existing applications for new functions.
- Conflict between in-house legacy applications and that of the vendors.
- Inadequate performance because of outdated applications.

Overcome these challenges, improve business functions in an efficient and smooth manner, and optimize cost with these Enterprise Architecture processes.



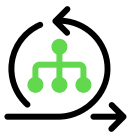
Enterprise Modeling and Visualization

Create diagrams and model the future state of your IT and its relationship to the business landscape.



Rationalization of business applications

Rationalize all business applications in a category and decide whether to invest, sustain, migrate, or retire an application.



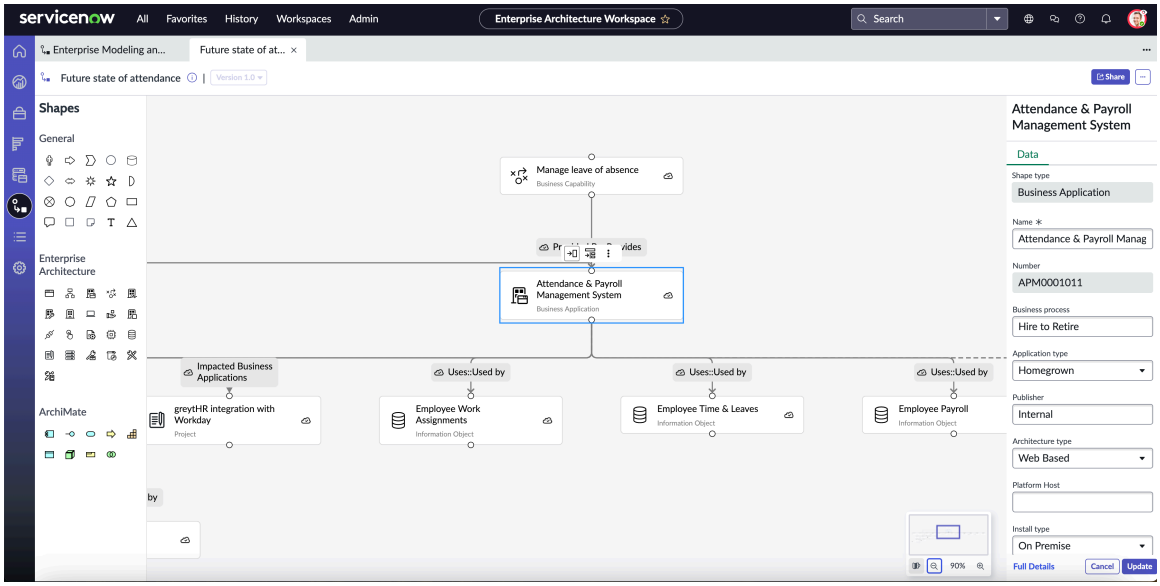
Data Certification

Ensure the accuracy, completeness, and reliability of critical enterprise architecture data.

Enterprise Modeling and Visualization in the EA Workspace

Create diagrams and model the current and future state of your architecture and its relationship to the business landscape.

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Enterprise Modeling and Visualization in the Enterprise Architecture Workspace enables enterprise architects to:

- Create architecture diagrams using industry-aligned standards such as CSDM, ArchiMate, and AWS
- Model applications, business capabilities, processes, value streams, and cloud architectures
- Maintain architectural context by associating diagrams with applications, capabilities, and artifacts
- Generate architecture documents directly from diagrams for review, sharing, and approval

These visual models help stakeholders understand dependencies, assess impact, and plan change with confidence.

Architecture Analyzer

Visually explore and analyze architecture relationships without creating or maintaining custom diagrams.

Architecture Analyzer provides a dynamic canvas to:

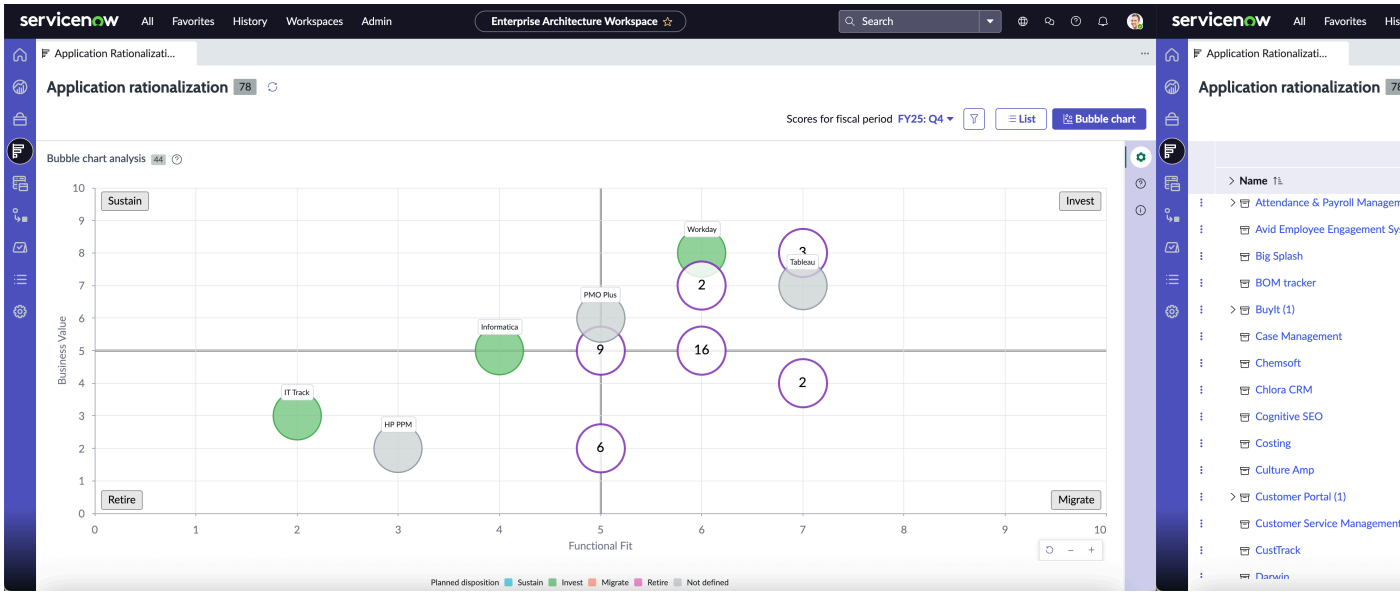
- Analyze relationships across applications, services, infrastructure, and Enterprise Architecture extended entities
- Understand dependencies and assess the impact of architectural changes
- Explore architecture perspectives interactively to support collaboration and decision-making

Architecture Analyzer helps architects quickly assess complex landscapes and communicate insights effectively.

Rationalization of business applications

Evaluate and rationalize business applications to support modernization and investment decisions.

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Application Rationalization enables you to:

- Assess applications using standardized indicators such as cost, risk, value, and technical debt
- Compare applications using interactive bubble charts and list views
- Identify redundancy and prioritize actions to invest, sustain, migrate, or retire applications
- Apply filters and fiscal periods to analyze application performance over time

These insights support data-driven decisions across large application portfolios.

Bubble charts are interactive graphs that position applications in different quadrants, based on their indicator scores. Based on the position of the business application in the quadrants, enterprise architects can take decisions to invest in, sustain, migrate, or retire the business applications.

The List view enables you to see high-level information on all your business applications and all the indicator scores that are attached to them.

Publishing Center in Enterprise Architecture Workspace

Control and manage publishing workflows from a centralized location.

The publishing center enables you to:

- Publish Technology Reference Model (TRM) catalogs to a knowledge base
- Share approved technology standards across the organization
- Monitor publishing status and view publishing history
- Govern architecture outputs with consistent publishing processes

Publishing center simplifies how architectural standards and insights are shared and consumed.

Data Certification in Enterprise Architecture Workspace

Ensure the accuracy, completeness, and reliability of critical enterprise architecture data.

With data certification, you can:

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- Define certification policies directly in the Enterprise Architecture Workspace
- Run certifications on demand or on a schedule
- Track certification status and identify overdue or failed certifications
- Improve trust in architecture data used for reporting and decision-making

Data certification helps maintain high-quality data across architecture portfolios.

Applications and features

- Enterprise Architecture Workspace
- ServiceNow Otto for Enterprise Architecture (EA)
- Managing requests, certifications, and assessments
- Exploring a business portfolio
- Explore the Enterprise Architecture Workspace dashboard
- Exploring Technology Lifecycle Management (TLM) in Enterprise Architecture Workspace
- Exploring Enterprise Modeling and Visualization in the EA Workspace
- Gantt view of TLM and TRM lifecycle timelines
- Rationalization of business applications
- Manage application total cost of ownership (TCO) in Enterprise Architecture Workspace

Enterprise Architecture Workspace

The Enterprise Architecture Workspace (EA Workspace) is part of the Enterprise Architecture application. It provides an interactive interface for enterprise architects to manage tasks, gain insights, and monitor portfolio health.

https://player.vimeo.com/video/1062780763?h=ef46d796d0&badge=0&autopause=0&player_id=0&app_id=58479

Get started

Explore	Configure	Integrate
		
Learn the key features and business value that Enterprise Architecture Workspace offers	Configure Enterprise Architecture Workspace	Integrate Enterprise Architecture Workspace with other applications

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Use	Reference	
 Learn how to use Enterprise Architecture Workspace	 Get details about components, form fields, and general guidelines of Enterprise Architecture	

Troubleshoot and get help

- Ask or answer questions in the Enterprise Architecture (formerly Application Portfolio Management) forum on the ServiceNow Community
- Search the Known Error Portal for known error articles
- Contact Customer Service and Support
- Find articles on APM learning path, implementing, and other resources.

Exploring Enterprise Architecture Workspace

The Enterprise Architecture Workspace is part of the Enterprise Architecture application. The workspace is a unified interface with multiple views that help you manage your portfolio efficiently. You can use these views to stay up to date with your tasks, insights, tasks that need attention, portfolio health, and dashboards.

Accessing the workspace

You can navigate to the Enterprise Architecture Workspace in the following two ways:

- If Next Experience is activated on your instance, select **Workspaces** then select **Enterprise Architecture Workspace**.
- If Next Experience isn't activated on your instance, then on the left navigation bar, enter `Enterprise Architecture Workspace`. Select **Workspace Home** to open the Enterprise Architecture Workspace.

Related topics

Enterprise Architecture Workspace access roles

Tables installed with Enterprise Architecture Workspace

Scheduled jobs installed with Enterprise Architecture Workspace

Business stakeholder role for Enterprise Architecture Workspace

Enterprise Architecture Workspace user interface

Configuring Enterprise Architecture Workspace

Managing Enterprise Architecture Workspace

Integrating Enterprise Architecture Workspace with other applications

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Enterprise Architecture Workspace user interface

The Enterprise Architecture Workspace provides a consolidated user interface with role-based page views for analysts, architects, administrators, and users.

Highlights of the EA Workspace user interface

Consolidated user experience

The Enterprise Architecture Workspace home page provides visibility into your application portfolio. All the tasks that you can perform in the workspace are streamlined to fulfill your business goals.

Role-based page views

Distinct page views for the exclusive activities of an Enterprise Architecture Analyst or Enterprise Architect, Enterprise Architecture administrator, and Enterprise Architecture user. Enterprise architects access contextual information and targeted actions for their tasks.

Home page sections

The home page contains the following UI components to help you navigate through the workspace.

Overview

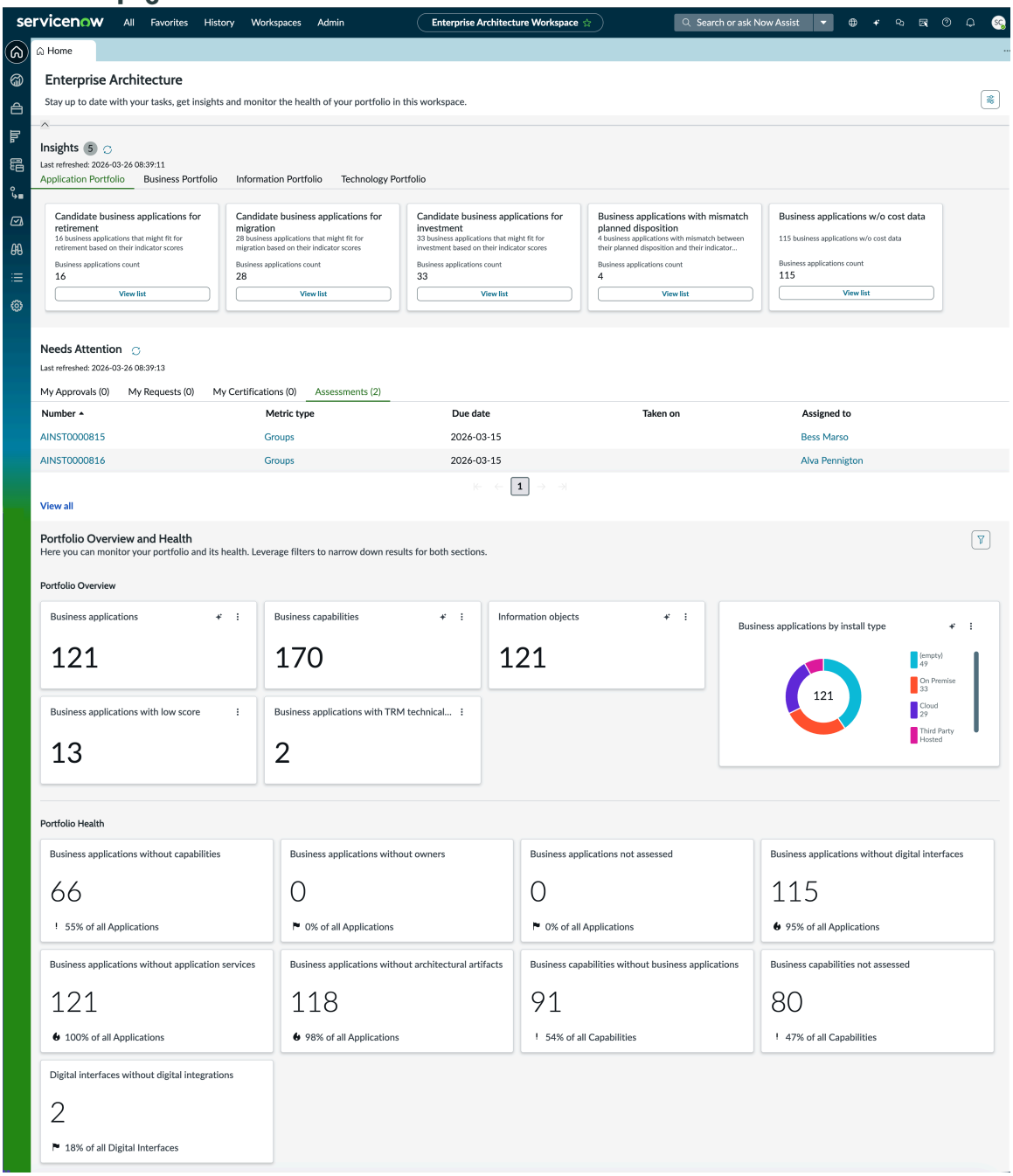
The Overview page displays the following sections:

- **Insights**: Highlights various conditions for your application portfolio, business portfolio, information portfolio, and technology portfolio such as if business applications aren't related to a business capability.
- **Needs Attention**: Lists the tasks that you must act on. You can see the number of tasks for each tab.
  - The **My Approvals** tab lists the requests that are waiting for your approval.
  - The **My Requests** tab lists the requests that you have raised.
  - The **My Certifications** tab lists the certification tasks that are assigned to you, any group you belong to, any group you manage, or any of your direct reports. You can use this tab to keep your business applications inventory up to date by periodically certifying the data in the business applications table.
  - The **Assessments** tab lists the assessments for your applications that help you to evaluate and score your business applications based on qualitative inputs.
- **Portfolio Overview and Health**: Monitor your portfolio and its health. Use the filter option to view specific business applications and business capabilities information. An indicator is displayed on top of the filter icon to show the number of filters applied. You can also clear all applied filters using the **Clear all filters** button.

  For more information, see Apply filters to the Portfolio Overview and Health section.

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Overview page



Note: Page layouts shift to a vertical, stacked view when you zoom to 200% or 400% in your browser settings.

Related topics

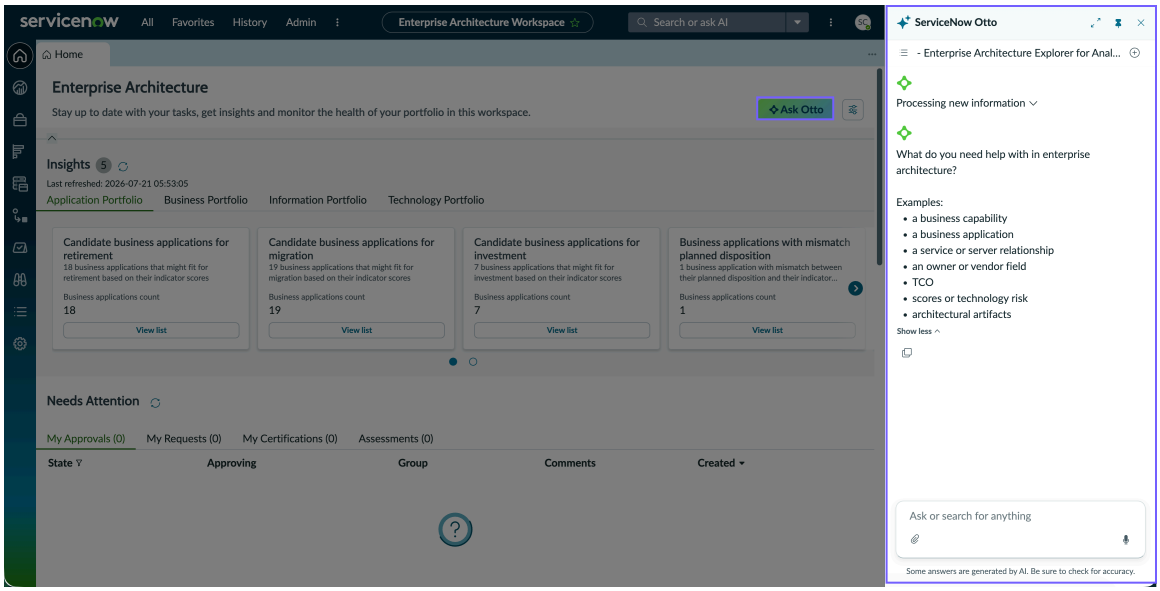
- Viewing insights of your portfolio
- Managing requests, certifications, and assessments
- Explore the Enterprise Architecture Workspace dashboard
- Portfolio overview and health
- Exploring a business portfolio
- Gantt view of TLM and TRM lifecycle timelines
- Rationalization of business applications

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Exploring Technology Portfolio view
Exploring Portfolio list view
Show or hide sections on the home page of the EA Workspace
Exploring the Setup page in the Enterprise Architecture Workspace
Manage application total cost of ownership (TCO) in Enterprise Architecture Workspace
Exploring Technology Lifecycle Management (TLM) in Enterprise Architecture Workspace

Exploring Enterprise Architecture query agent

The Enterprise Architecture query agent answers natural language questions about your enterprise architecture portfolio, returning AI-generated answers grounded into their Enterprise Architecture data.



Note: Depending on your license, you will have access to certain application features, generative AI skills, agentic workflows, and AI agents. For more information, see ServiceNow product tiers.

Important: This generative AI skill is turned on by default. The skill will be automatically available to appropriate role users for the application. For more information, see AI agents, skills, and agentic workflows on by default.

The Enterprise Architecture Explorer Query Agent is a ServiceNow Otto agent for Enterprise Architecture. It lets architects and portfolio managers query their EA data using natural language, without navigating dashboards or building reports manually.

The agent interprets the structure of your EA portfolio, including business applications, capabilities, value streams, technology standards (TRM), and information objects. It returns structured answers based on your data. When processing a question, the agent searches for relevant data and actions before generating a response. After answering, the agent may display suggestions for related questions to help you explore further. Responses are generated by the large language model (LLM) that your organization has subscribed to on the ServiceNow® platform. The responses may also differ depending on the selected LLM.

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You can ask questions about individual records, apply multiple filter conditions, compare trends across fiscal periods, or model impact scenarios such as decommissioning an application.

Note: The Enterprise Architecture query agent is read-only. It retrieves and analyzes your EA data but does not create, modify, or delete any records in your instance.

When a response references a specific record, such as a business application or a capability, the record name appears as linked text. Select the linked text to navigate directly to that record in Enterprise Architecture Workspace.

What you can ask about

The Enterprise Architecture Explorer Query Agent answers questions across the following EA data domains:

EA data domains supported by the Enterprise Architecture Explorer Query Agent

Domain	Topics covered	Example queries
Business applications	Ownership, lifecycle phase, application category, CSAT and technical risk scores, retirement candidates	• Get the owner of a business application • Which applications are candidates for retirement?
Business capabilities	Hierarchy, scores, capability-to-application coverage	What are the top-level capabilities?
App capability relationships	Applications supporting a capability, applications with no capability assignments	• List business apps supported by multiple capabilities • Which business applications aren't assigned to capabilities?
Trends	Score comparisons for one or more applications	Compare the quarterly trends for two business applications
TRM and technology	Software versions, lifecycle phase	• List all versions of a specific software • What is the lifecycle phase of an application?
Information objects	Producing and consuming applications, orphaned objects	Which information objects have no producing or consuming applications?

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EA data domains supported by the Enterprise Architecture Explorer Query Agent (continued)

Domain	Topics covered	Example queries
Impact analysis	Capability and information object impact of decommissioning an application	If a business application is decommissioned, which capabilities and information objects are impacted?
Infrastructure impact analysis	Business capabilities, business applications, and application services affected by an infrastructure CI such as a database, database instance, server, or storage device. Includes the infrastructure that an entity depends on.	• Which business capabilities are impacted if a specific database fails? • Which entities are affected by a failure of a specific server or storage device? • Which servers and databases support a business application?
Technical debt	Applications flagged for technical debt	Can you share a list of technical debts?

Infrastructure impact analysis

You can ask the Enterprise Architecture query agent about the impact of an infrastructure configuration item (CI), such as a database, database instance, server, or storage device. The agent follows the CMDB relationships from the CI up through the application services and business applications that depend on it. It then traces those applications to the business capabilities they support. You can also ask what infrastructure a named application service or business application depends on.

Infrastructure impact responses work as follows:

- If the CI name that you enter is partial or spaced differently from the stored name, the agent searches for similar names. If more than one CI matches, the agent lists the matching CIs with their class so that you can specify the correct one.
- If a CI supports multiple application services or business applications, the response includes every impacted record, not only the first match.
- The response can include the path from the CI to each impacted record, with the relationship type at each step, so that you can validate the result.
- If the CI isn't related to any application service or business application, or the chain stops before the requested entity type, the response names the missing relationship.
- If the CI has many relationships, the response indicates that the results may be partial.

Important information to derive the best results

To get the most accurate responses from the agent, remember the following:

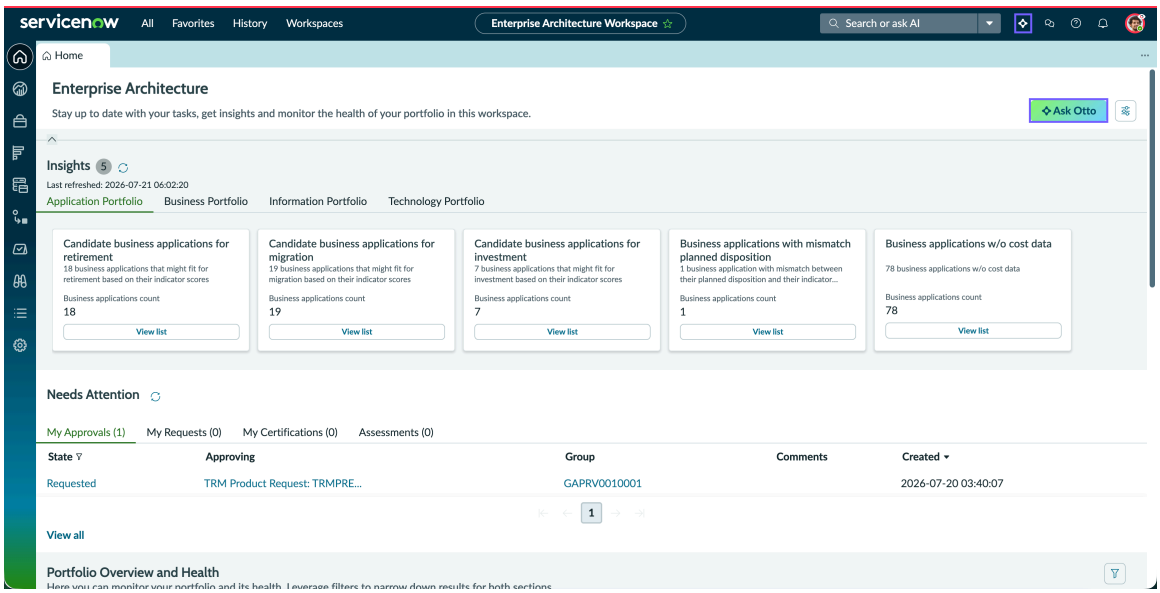
- The agent works best for questions involving one or two relationship types. For queries with three or more relationships, it's recommended to check the results against your source records for completeness. Example of a query with three or more relationships, List all child capabilities, their providing applications, the information objects those applications use, and the services they consume.

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- Large-scale aggregations — For counts and percentages across large data sets, treat results as indicative figures. For precise values, verify against your source records.
- The agent queries your enterprise architecture data using the Knowledge Graph, which is updated through scheduled jobs. If new relationship types, tables, or custom fields are added to your instance, the Knowledge Graph does a scheduled refresh to generate updated descriptions. Some specialized or less common data points may not be fully represented yet, which could lead to partial responses for certain queries.
- For questions about a specific record, include the record name or identifier in your query to help the agent return the most relevant response. For example, Is Order Management a leaf capability?

Access

The Enterprise Architecture query agent is available through the ServiceNow Otto panel across Enterprise Architecture Workspace. Select the ServiceNow Otto icon to open the panel and start a conversation with the agent directly.

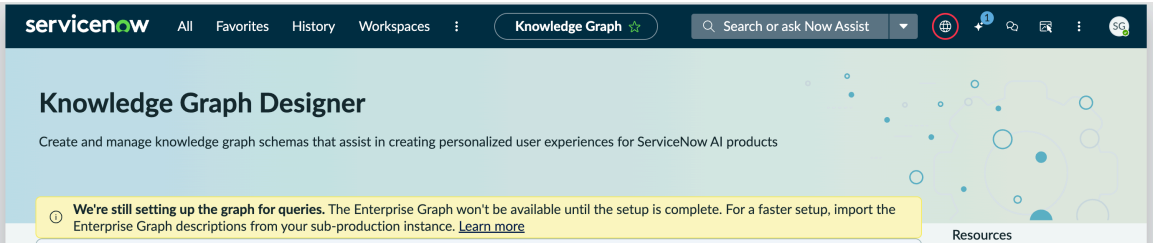


ServiceNow Knowledge Graph dependency

The Enterprise Architecture query agent uses the ServiceNow Knowledge Graph to answer questions about CMDB relationships and infrastructure data. An administrator must enable the required Knowledge Graph system properties before the agent can access this data.

After the system properties are enabled, Knowledge Graph runs scheduled jobs to process your CMDB data. The time required for initial processing varies by the volume of data in your instance and may take several days or longer. During this period, responses that rely on CMDB relationship data may be incomplete. Results improve progressively as processing continues. If the Knowledge Graph data processing is in progress, the Knowledge Graph Designer displays a notification. This means that the scheduled jobs required to set up the enterprise graph are still running. The Enterprise Architecture query agent is not available until this process is complete and the notification is no longer displayed. To speed up the process, you can import enterprise graph descriptions from a sub-production instance where setup has already completed. For more information, see Enterprise Graph initial setup in production instance.

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For enable the Knowledge Graph system properties, see Enable Knowledge Graph system properties for the Enterprise Architecture query agent.

All data displayed by the Enterprise Architecture query agent is sourced directly from the ServiceNow® Knowledge Graph, which is built from and continuously updated by your instance's CMDB data. When you submit a question, the agent queries the Knowledge Graph to identify relevant records, relationships, and attributes before generating a response.

This means the agent does not draw on general knowledge or external sources. Every answer is grounded in the data that exists in your instance — such as CI relationships, application ownership, capability mappings, and lifecycle information stored in your CMDB. If a record does not exist in your CMDB, the agent will not surface it.

Note: The accuracy and completeness of the agent's responses depend on the quality and completeness of your CMDB data. Keeping your CMDB up to date ensures the most reliable answers.

For information on the ServiceNow Knowledge Graph see the links.

- Exploring Knowledge Graph
- Setting up Enterprise graph in sub-production instance
- Configuration item relationships and Knowledge Graph

Related topics

Working with Enterprise Architecture query agent

Working with AI agent agentic workflow in ServiceNow Otto for Enterprise Architecture (EA)

Enable Knowledge Graph system properties for the Enterprise Architecture query agent

Activate the ServiceNow Otto panel standard chat

Access Enterprise Architecture data using MCP tools

Elaborate or shorten content in form fields

Elaborate or shorten text in the description or reasoning fields in forms using ServiceNow Otto in the Enterprise Architecture Workspace. You can also use prompts to generate content for the **Reasoning** field found in **Planned Disposition** section of a business application form.

Before you begin

Note: Depending on your license, you will have access to certain application features, generative AI skills, agentic workflows, and AI agents. For more information, see ServiceNow product tiers.

Important: This generative AI skill is turned on by default. The skill will be automatically available to appropriate role users for the application. For more information, see AI agents, skills, and agentic workflows on by default.

The default AI model provider for this skill is Azure OpenAI.

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Role required: sn_apm.apm_user

About this task

Description and reasoning fields often require clear, concise, and contextually accurate information. You can use ServiceNow Otto context menu to streamline the process and ensure that the captured information in the fields is comprehensive and easy to understand. The refine text skill is available in the forms of the following entities:

Forms with Refine text skill available

Entity name	Field name	Action available
Business application	Description	Elaborate or shorten existing content
Business application	Reasoning	• Create reasoning content by entering prompts in the text box • Elaborate or shorten existing content
Business capability	Description	Elaborate or shorten existing content
Business process	Description	Elaborate or shorten existing content
Value stream stage	Description	Elaborate or shorten existing content
Information object	Description	Elaborate or shorten existing content

Procedure

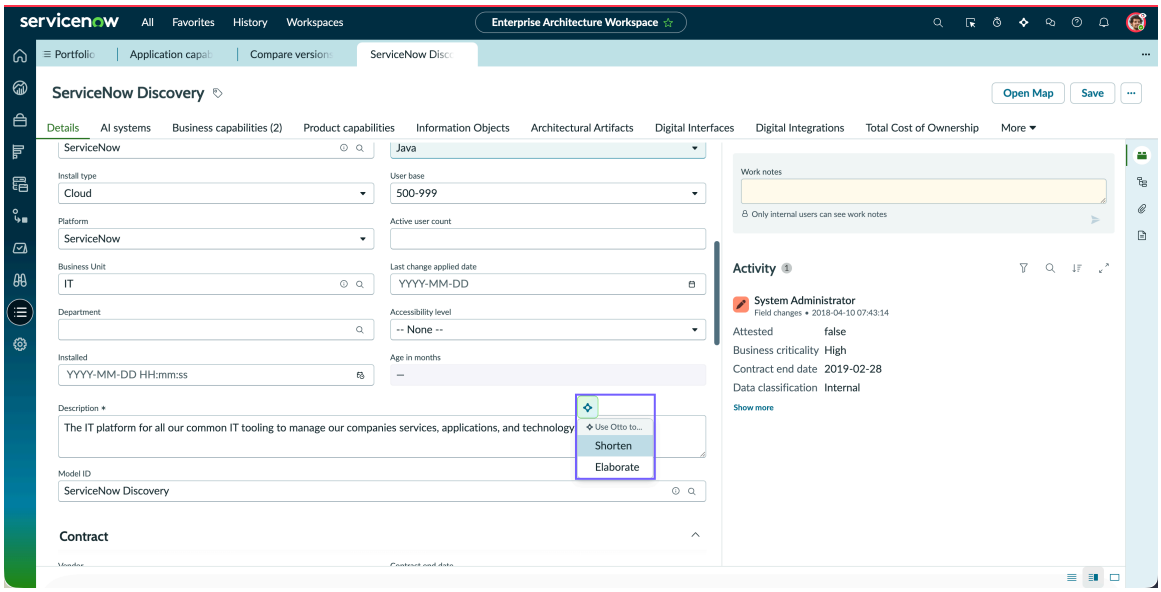
1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Portfolio List view by selecting the Portfolio icon .
3. Select the expand row icon ( ) next to **Application Portfolio**.
4. Select **Business Applications**.

Note:

- For business capability, select **Business Architecture** > **Business Capability**.
- For business process, select **Business Architecture** > **Business Processes**.
- For value stream stage, select **Business Architecture** > **Value Stream Stages**.
- For information object, select **Information Portfolio** > **Information Objects**.

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5. Select the business application whose content you want to elaborate, shorten, or generate.
6. Select the **Description** field to perform any of the following tasks.
   - **Elaborate**: Elaborates the selected text.
   - **Shorten**: Shortens the selected text.



7. Select the **Reasoning** field to perform any of the following tasks.
   - Text box: Use the text box to enter any prompts and derive the required information from the existing business application content.
   - **Elaborate**: Elaborates the selected text.
   - **Shorten**: Shortens the selected text.
8. Select **Save**.
   The business application data is saved.

Related topics

- Business application form
- Create business capability form
- Create business process form
- Create value stream stage form
- Create information object form
- Exploring ServiceNow Otto for Enterprise Architecture (EA)
- Configure ServiceNow Otto for Enterprise Architecture (EA)
- ServiceNow Otto for Enterprise Architecture (EA) access roles

Viewing insights of your portfolio

You can view the insights for your business portfolio, information portfolio, application portfolio, and technology portfolio.

You can see the details such as the following:

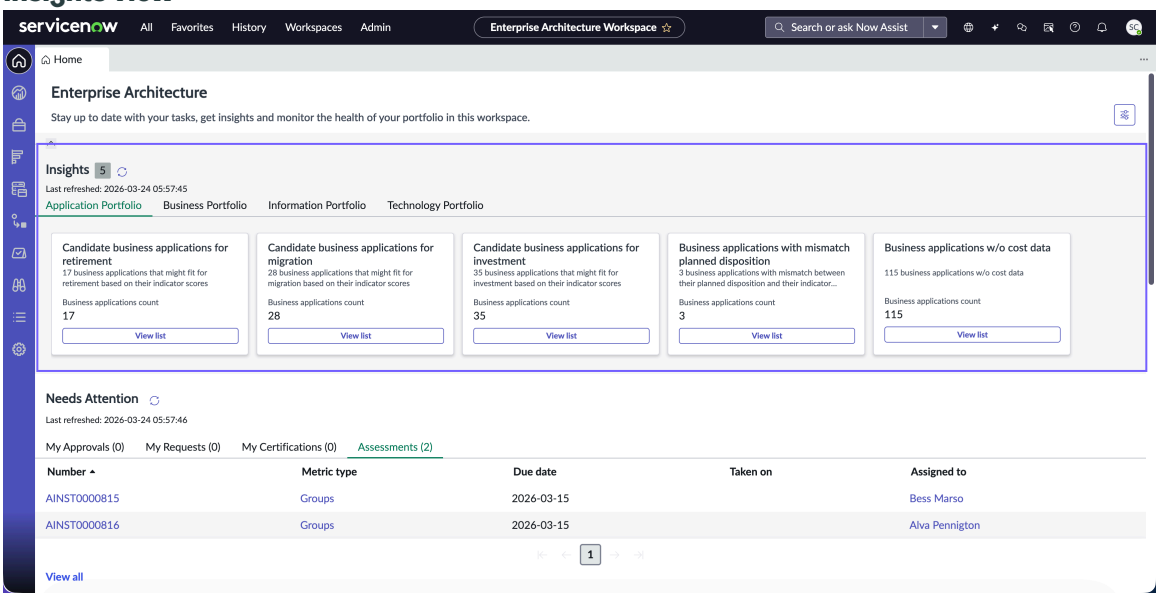
- Desired and scripted audits
- Hardware models

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- Software products that are facing high and moderate technology risks
- Pending certification instances that are open and not 100% complete

The last refreshed time shows when the results were refreshed in your browser. You can manually refresh the results by using the refresh icon ( ). You can navigate to the full list in the Application Rationalization by selecting the **View list** button. You can see the details of a record by selecting it.

Insights view



Application Portfolio

Track information for your business applications. The cards displayed in this section are:

- **Past due certification tasks for business applications**: Displays the number of application certification tasks that are past due. This card isn't displayed if there are no certification tasks or there are no certification tasks that are past due. The data for this card is calculated from the CMDB Data Management Task (cmdb_data_management_task_list) table.
- **Candidate business applications for retirement**: Displays the number of business applications that are fit for retirement, based on their indicator scores.
- **Candidate business applications for migration**: Displays the number of business applications that are fit for migration, based on their indicator scores.
- **Candidate business applications for investment**: Displays the number of business applications that are fit for further investment, based on their indicator scores.
- **Business applications w/o cost data**: Displays the number of business applications that lack any cost data associated with them.

Note: To learn about application indicator scores, see Manage indicators.

Business Portfolio

Get insights on your business capabilities, business applications and manage them effectively to fulfill the goals of your organization.

Information Portfolio

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Track the details of the information objects that are related to the business applications and integrations in your enterprise.

Technology Portfolio

Track the technology lifecycle risk for business applications, application services, servers, software products, and hardware models.

Track technology risks

Use this filter to see the risks for the next 1 month, 3 months, 6 months, 12 months, and 18 months. By default, the 1-month filter is applied.

Show only production instances

Use this toggle button to see only productions instances that are having technology lifecycle risks. By default, this filter is off.

View all technology lifecycle risks

Select this link to see the list of all technology lifecycle risks sorted by earliest lifecycle date, which means the earliest date when a technology lifecycle risk is to happen. You can also export the Technology lifecycle risks information to Excel, CSV, JSON, or PDF as required.

The data in the Technology lifecycle risks table is fetched from the TPM Discovered Technologies [sn_apm_tpm_discovered_technology] table.

Technology lifecycle risks

Field	Description
Earliest lifecycle date	The minimum of End of support or End of extended support or End of life dates
Business application	Name of the business application
Application service	Service associated to the business application
Type	Element type. Choices are: • Software • Hardware
Software product	Name of the software product
Hardware model	Model number for the hardware product
Server	Name of the server that is associated with the software product or hardware model.
End of support date	The end of support date for the software product or hardware model
End of extended support date	The end of extended support date for the software product or hardware model

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Technology lifecycle risks (continued)

Field	Description
End of life date	The end of life date for the software product or hardware model
Used for	The application service being used for. For example, production or staging.
TPM technology lifecycle	The link to the TPM technology lifecycles of the hardware model or software product.

Managing requests, certifications, and assessments

As an Enterprise Architect, you can manage all requests. You can view the status of the certifications, assessments, and technology portfolio audit information.

My approvals

The **My Approvals** tab lists the requests that are waiting for your approval.

My requests

The **My Requests** tab shows the list of requests assigned to you as an approver. By default, it shows all the requests as a paginated result. Select **View All** to see the full list. You can open a request record by selecting it to approve or reject the request.

My certifications

The **My Certifications** tab shows the list of certifications that are relevant to you. Specifically, the tab displays certifications that meet any of the following criteria:

- Assigned directly to you
- Assigned to any group you belong to
- Assigned to any group you manage
- Assigned to any of your direct reports

You can use this tab to keep your business applications inventory up to date by periodically certifying the data in the business applications table. Keeping your business application data current helps you assess your business applications accurately, as several indicators depend on this data.

Select **View All** to see the full list of certifications. Select the certification number, certification schedule, or certification instance to see more details.

If you have directly installed the 4.0.0 version of the EA Workspace store application, the My certifications table fetches data from the CMDB Data Management Task (cmdb_data_management_task) table.

If you upgraded your EA Workspace from a previous version to the 4.0.0 version, your certification data may still be fetched from the Certification Schedules (cert_schedule) table. You must migrate your certification policies to the CMDB Data Management Certification Policies

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(sn_cmdb_ws_dm_certification_policy) table. For more information, see Import certification schedules in to Data Managerand Publish a draft Data Manager policy.

Assessments

The **Assessments** tab shows the list of assessments for your applications that help you to evaluate and score your business applications based on qualitative inputs. Application indicators are business metrics that assess the applications across dimensions such as cost, quality, technical risk, investments, user satisfaction, and business value.

Each indicator periodically captures related application data that is used to calculate the application score. The assessment of applications is done on an extensible framework, which is based on the various configured indicators. If you require indicators other than the preconfigured ones to calculate the application score, then you can create an indicator based on your business requirements.

You can select **View all** to see the list of assessments. Select the assessment number and metric type to see more details.

Technology Portfolio audit

The#**Technology Portfolio Audit** tab shows audit information for your applications. An entry in this table indicates that at least one lifecycle for that software product or hardware model was either approximated, or not found, or doesn't exist. For example, the software product full version might be 9.2.1. The End of Support lifecycle version in the Software Asset Management Content library might only be full version 9.2. This audit table helps you to evaluate the lifecycle matching information based on the details of the products being used in your organization. Use the table to identify exact lifecycle version matches or missing lifecycle versions for software products and hardware models in your organization.

The data in the Technology Portfolio Audit table is fetched from the TPM Technology Lifecycle Exception [sn_apm_tpm_technology_lifecycle_exception] table.

As an admin user, you can run the *`Populate TPM Discovered Technologies and Lifecycles`* scheduled job on-demand to calculate the technology lifecycle risk for your application portfolio. The scheduled job executes the script generating the lifecycle risk dates for your software products and hardware models by querying the ITAM content library. These dates include end of support date, end of extended support date, and end of life date. For more details, see Run a scheduled job to generate TPM lifecycle data. Whether the script runs on demand or scheduled, you can view the results in the Portfolio > Technology Portfolio Management > Logs page.

Technology portfolio audit table

Column name	Description
Type	Application type. Choices are: • Software • Hardware
Software product	Name of the software product.
Product version	Version number of the product.
Product edition	Edition of the product. For example, Standard.
Product full version	Full version of the product.

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Technology portfolio audit table (continued)

Column name	Description
Hardware model	Hardware model that is associated with the software product.
Verification status	Verification status of the product. Choices are: • Need to verify • Verified • Rejected
Comments	Customer comments.
Lifecycle phase	Lifecycle phase of the product.
Phase start date	Lifecycle phase start date.
Edition	Edition of the lifecycle.
Full version	Full version of the lifecycle.
Match notes	Notes by the customer.
Technology lifecycle	TPM technology lifecycle information of the software product or hardware model.

Technical Debt

The#**Technical Debt** tab shows the list of TRM technical debt that are created for the products that are not aligned with the TRM phases and standards. A technical debt indicates either there is no TRM product record for a software product used by one or more business applications. It may also indicate that the TRM product has one or more internal lifecycle phases that restrict its usage. In this table, you can view the TRM products and associated business applications details, and the reason for the technical debt. A custom scheduled job *`Populate TRM technical debts in the EA Workspace`* runs and creates an entry in the TRM Technical Debt table. For more details, see TRM technical debt and Update TRM technical debt data using scheduled job.

Technical Debt table

Column name	Description
TRM product	Name of the TRM product. A software product that is having version specific life cycles.
Business Application	Name of the business application associated with the TRM product.
Software product model	Name of the software product model related to the TRM product.
TRM phase	Phase of the TRM product. The following TRM phases are available from the base system: • Approved: The technology is approved for use. • Approved with Constraints: The technology can be used within the specified constraints specified in the comments.

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Technical Debt table (continued)

Column name	Description
	• Divest: A decision was taken to divest from the use of the technology. • Evaluation: This technology is being evaluated and can't be used to production purposes. • Unapproved: The technology isn't permitted to be used. **Note:** You can modify these phases from the EA Workspace > Setup > TRM Phases page.
TRM level	The level (Product or Product Lifecycle) at which the technical debt is created.
Version	Version of the software product. Usually, the name of the Software product model contains this version.
Reason	The reason to explain why the technical debt was created.
Last run	Shows the time stamp when the custom scheduled job *`Populate TRM technical debts in the EA Workspace`* is run to update the table with technical debt.

Related topics

Approve or reject a modeling diagram request

Exploring dashboards in Enterprise Architecture Workspace

You can use dashboards in Enterprise Architecture Workspace, to track and make informed decisions related to your organization's enterprise architecture landscape.

The following are three dashboards are available in the Enterprise Architecture Workspace, by default:

- Enterprise Architecture dashboard
- Application Assessments dashboard
- Application 360 dashboard

For guidance on using the dashboards in Enterprise Architecture Workspace, see Working with Dashboards.

Related topics

Generate insights for Enterprise Architecture Workspace dashboard widgets

View application performance in Application Assessments dashboard

Monitor performance in Application 360 dashboard

Explore the Enterprise Architecture Workspace dashboard

The Enterprise Architecture Workspace dashboard provides a summary of the business and application portfolio of your organization. It's arranged according to different portfolios such as the application portfolio, technology portfolio, and information portfolio.

As an enterprise architect, use the interactive filters to generate different graphical reports of the business applications for your portfolios. You can select a pie chart slice or graph bar to open a

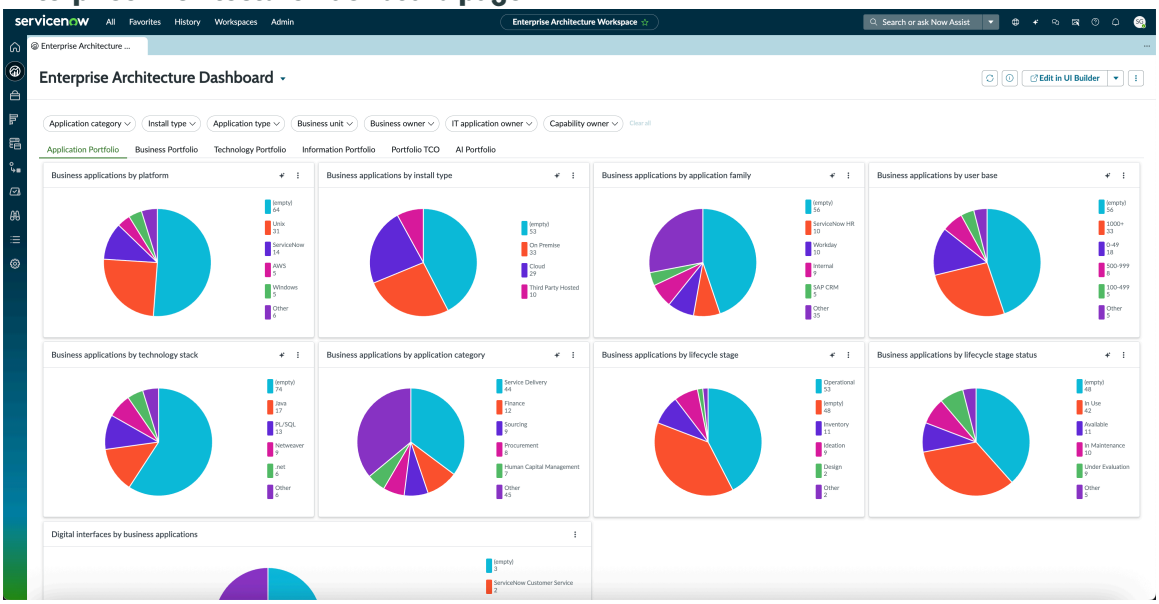
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particular page and see the list of records under that category. To hide or show a slice in the pie chart, select its colored legend. Use the **Refresh** button to refresh the results of a pie chart.

End users and roles

End user and goal	Required role
Enterprise Architecture Analyst- Create, configure, and share dashboards	sn_apm.apm_analyst
Enterprise Architecture User- View dashboards	sn_apm.apm_user

Enterprise Architecture Dashboard page



Data visualizations

The dashboards include the following visualizations.

Tab name	Visualization title	Visualization type
Application Portfolio	Business applications by platform	Pie chart
Application Portfolio	Business application by install type	Pie chart
Application Portfolio	Business application by application family	Pie chart
Application Portfolio	Business application by user base	Pie chart

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Tab name	Visualization title	Visualization type
Application Portfolio	Business applications by technology stack	Pie chart
Application Portfolio	Business applications by application category	Pie chart
Application Portfolio	Business application by lifecycle stage	Pie chart
Application Portfolio	Business application by lifecycle stage status	Pie chart
Application Portfolio	Digital interfaces by business applications	Pie chart
Business Portfolio	Business capabilities with low scores	Bar graph
Technology Portfolio	TRM products by TRM phase	Pie chart
Technology Portfolio	Approved software counts by TRM category	Pie chart
Technology Portfolio	Top 10 business applications with highest TRM technical debt	Bar graph
Technology Portfolio	Top 10 business applications with normalized TPM risk	Column chart
Information Portfolio	Business applications by data classification	Pie chart
Information Portfolio	Information objects by data domain	Pie chart
Portfolio TCO	Business application TCO for FY:Q (Current quarter)	Summary

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Tab name	Visualization title	Visualization type
Note: For information on TCO, see Exploring total cost of ownership (TCO) in Enterprise Architecture Workspace and Working with application Total Cost of Ownership (TCO).		
	Business application TCO for FY:Q (Previous quarter)	Summary 
	Business application TCO trend for year	Line graph 
	Business application TCO by application category	Column chart 
	Business application TCO by application planned disposition for FY:Q (Current quarter)	Horizontal bar graph 
	Business applications by TCO score	Column chart  The X-axis denotes the TCO scores while the Y-axis denotes the number of business applications. **Note:** If you upgraded from a previous release and the X-axis shows **(empty)** instead of the TCO score bands, run the *Update Score Range in Indicator Score Table* scheduled job. For information, see Run a scheduled job to update the TCO score range.
	Business application TCO by cost type and planned disposition for FY:Q (Current quarter)	Heat map 

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Tab name	Visualization title	Visualization type
	Top 10 business applications with the highest cost for FY:Q (Current quarter)	List 
AI Portfolio **Note:** The **AI Portfolio** tab is visible only when the AI Control Tower workspace is installed.	Business Applications by AI System Association	Donut 
	AI Systems by Business Application Association	Donut 

Note:

If both the Technology Portfolio Management (sn_apm_tpm) and Enterprise Architecture - TRM (snc.apm_trm) plugins are inactive, the Technology Portfolio tab is not displayed.

- All monetary values are displayed in a single currency type. The currency conversion rates are contained in the Currencies table (fx_currency.list).

  The currency type is determined based on the geographical location from where you've logged in. For example, if the system detects that you've logged in to the EA workspace from the USA, the default currency displayed is USD.

- The duration of a fiscal period displayed on the widgets is determined from the *com.glide.fiscal_calendar.fiscal.unit* property. To set the fiscal period duration, see Set the fiscal period property for TCO dashboards.

You can hover over or select the visualizations to see more data.

Use the following filters to narrow down the results in the dashboard page:

- Application Category
- Install Type
- Application Type
- Business Unit
- Business Owner
- IT Application Owner
- Capability Owner

You can manually refresh the dashboard by using the refresh icon ().

Related topics

Configure AI Data Explorer and Query Generation skills

Generate insights for Enterprise Architecture Workspace dashboard widgets

Run a scheduled job to update the TCO score range

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AI Control Tower integration with Enterprise Architecture

#unique_61

Explore the Application Assessments dashboard

The Application Assessments dashboard is a responsive dashboard that provides a complete view of applications.

The widgets on the dashboard visualize data over time, helping you analyze business processes and identify areas for improvement. The spline chart gives you a trend of the application indicators against the normalized value over different quarters in a fiscal period.

The Application Assessments dashboard provides preconfigured reports and you can also configure these reports according to your requirement.

You can also filter the data on the dashboard and share the different indicators and indicator scores.

The following widgets are provided on the dashboard to help you analyze trends:

- Customer satisfaction trend: Level of customer satisfaction over time associated with various applications that belong to an application family. The normalized value is derived by computing the maximum and minimum application weight values.
- Usage trend: Usage of applications over time.
- Business value trend: Business value of the applications over time.
- Technical risk trend: Technical risks the applications may have over time.
- Total changes trend: Total changes made to the applications over time.

Use the following filters to narrow down the results on the dashboard page:

- Application category
- Business process
- Business unit

On applying any filter, the filter criteria are applied to all available widgets across the dashboard.

You can manually refresh the dashboard by using the refresh icon ().

Related topics

View application performance in Application Assessments dashboard

Explore the Application 360 dashboard in Enterprise Architecture Workspace

The Application 360 dashboard performs as a reporting tool and uses Performance Analytics to provide a decision-making approach by identifying which business application requires focus and attention.

The Application 360 dashboard helps you to analyze the indicator scores and execute effective decisions.

From the Business Application list, you can select the business application that you want to monitor performance for.

The Application 360 dashboard contains the following sections:

Overall Application Score: Displays the overall application score for the fiscal period.

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Application Indicator Scores: Displays the trend and distribution for the different indicators for the selected fiscal period. You can use the Breakdown list to view the trend and distribution details at the following levels:

- Application profile indicator
- Business application
- Fiscal period

You can manually refresh the dashboard by using the refresh icon ().

Related topics

Monitor performance in Application 360 dashboard

Exploring data certification in the Enterprise Architecture Workspace

Data certification is a governance process that ensures the accuracy, completeness, and reliability of critical data within an organization. It is essential for data integrity, compliance, decision-making, and risk reduction. Ensures accurate data for application portfolio decisions. Certified data strengthens enterprise modeling and visualization.

Related topics

Working with data certification

Create a certification policy

Edit a certification policy

Run certification for a policy

Track progress of a certification policy

Activate a certification policy

Delete a certification policy

Deactivate a certification policy

Portfolio overview and health

Get an overview of your profile and monitor your portfolio health.

Portfolio overview

The Portfolio Overview section displays the overview of your portfolio in the form of numbers on different cards. You can use the refresh button to fetch the latest results. Click the number to see the full list.

The following cards are displayed:

- Business Applications
- Business Capabilities
- Information Objects
- Business Applications with High Risk
- Business Applications with Low Score: Number of business applications with low score for a quarterly fiscal period.
- Business Applications with TRM technical debt: Number of business applications that aren't aligned with the TRM phases and standards.

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Use the following filters to narrow down the results for Portfolio and Health sections:

- Application Category
- Install Type
- Application Type
- Business Unit
- Business Owner
- IT Application Owner
- Capability Owner

How portfolio data and filters are populated

The Portfolio Overview and Portfolio Health sections display metrics based on business application and capability records in Enterprise Architecture Workspace. Cards reflect the current state of these records and their relationships, such as owners, capabilities, and assessments.

Filter values are populated dynamically from existing application data. Owner-based filters use the users referenced in application and capability records, and available values depend on how those records are configured.

Portfolio health

The Portfolio health section displays the health of your portfolio. You can see the details such as the number and percentage of business applications on different cards. Click the number or percentage to see the full list. You can use the filters to narrow down the results.

The following cards are displayed:

- Business Applications without Capabilities
- Business Applications without Owners: Number and percentage of business applications for which there is no IT application owner and business owner assigned.
- Business Applications not Assessed
- Business Applications without Application Services: Number and percentage of business applications that are not related to any application service. Business application and application service are two different configuration items which must be related through a CI relationship.
- Business Applications without Architectural Artifacts: Number and percentage of business applications that aren’t associated to any architectural artifact. The association of Architectural Artifacts with business applications create a relationship between the artifact and related entities.
- Business Capabilities without Business Applications
- Business Capabilities not Assessed

The following cards are displayed only when the Digital Integration Management plugin (com.snc.apm_di) is installed:

- Digital Interfaces without Digital Integrations
- Business Applications without Digital Interfaces

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Note: You can zoom on this page or any of the child pages to 200% or 400% through your browser settings without the loss of content or functionality. Page layouts are transformed into a vertical, stacked view automatically.

Exploring the Setup page in the Enterprise Architecture Workspace

Using the Setup page in the Enterprise Architecture Workspace, as an Enterprise Architect, you can configure Enterprise Architecture (formerly Application Portfolio Management) features within the EA Workspace.

You can configure the following categories:

Information Data Domains

Data domain is a collection of information objects. Relate an information object to the database catalog of a database instance to collect the physical data. ServiceNow Discovery finds database catalog that lists all the catalog objects, or databases, discovered for an instance of a database. To create a data domain, see Add or edit an information data domain.

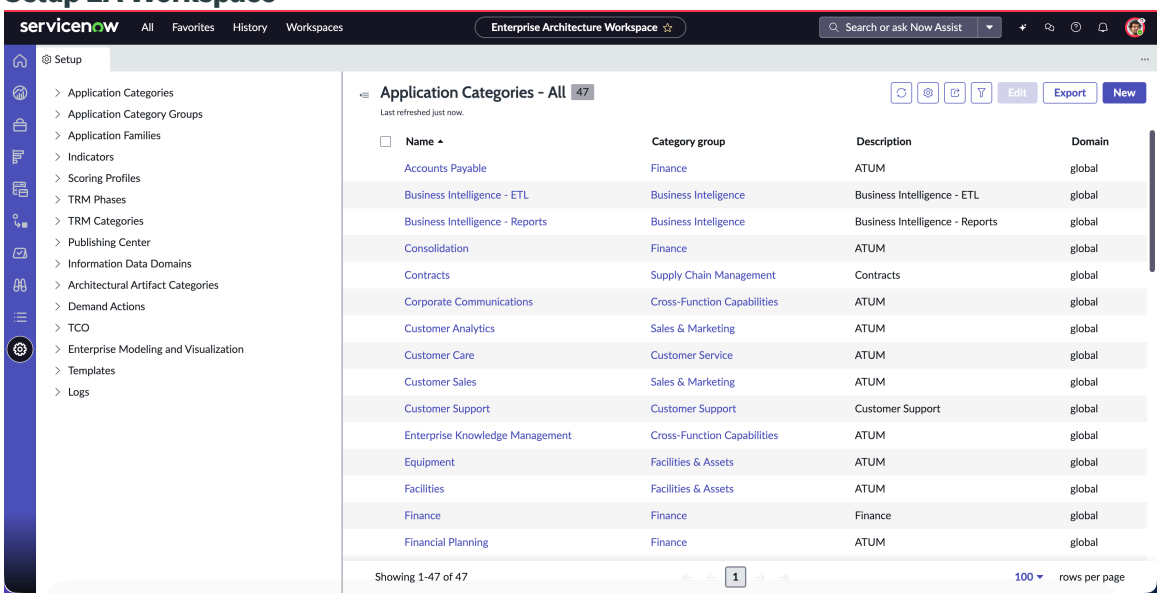
Architectural Artifact Categories

The architectural artifact categories enable you to categorize and manage artifacts more efficiently. To create an architectural artifact category, see Add or edit an architectural artifact category.

TCO

The Application total cost of ownership (TCO) feature helps you to leverage application costs to prioritize the application portfolio and align with the business strategy. For more details, see Manage application total cost of ownership (TCO) in Enterprise Architecture Workspace.

Setup EA Workspace



Related topics

Working with the Setup page

Exploring total cost of ownership (TCO) in Enterprise Architecture Workspace

Manage application categories

An application category is a grouping of applications by their purpose and function, fields, or areas.

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Such a categorization helps you to consolidate applications and rationalize decisions. Application categories provide clarity on your application landscape and enhances compliance.

Related topics

- View all application categories
- Add or edit an application category

Manage application category groups

An application category group is a collection of application categories. Category groups help with the filtering and reporting of the application categories.

Application category groups help organize your application categories into broader business-aligned clusters, making it easier to manage your application portfolios.

Related topics

- View all application category groups
- Add or edit an application category group

Manage application families

An application family is an attribute to group a set of related applications based on manufacturer classification of their products.

By grouping related applications, you can easily identify redundancies, overlaps, or gaps in your application landscape. This enables better governance through lifecycle tracking and making informed investment decisions across related applications.

You can define application families based on how you want to evaluate and compare applications, not just how they are classified. Create application families when multiple applications support the same business function, compete for the same investment, or share a common lifecycle or modernization goal. Group applications by business capability, platform or suite, or lifecycle direction only when it supports portfolio-level decision-making. Avoid creating application families when grouping does not add analytical value.

Related topics

- View all application families
- Add or edit an application family

Manage indicators

You can view, add, or edit application or capability indicators in the Enterprise Architecture Workspace.

Application indicators are business metrics that assess the applications across dimensions such as cost, quality, technical risk, investments, user satisfaction, and business value.

Capability indicators are used to access business capabilities within the indicator framework. Based on the indicator score, you can make strategic decisions on the business applications that support the business capabilities.

Each indicator periodically captures related application or capability data which is used to calculate the application or capability score.

Related topics

- View all application indicators
- Add or edit an application indicator

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- View all capability indicators
- Add or edit a capability indicator
- Activate or turn off an application or capability indicator
- Regenerate application indicator scores on-demand in Enterprise Architecture Workspace
- Regenerate capability indicator scores on-demand in Enterprise Architecture Workspace
- Application indicator score calculation in Enterprise Architecture Workspace

Manage scoring profiles

Scoring profiles help you to evaluate the applications based on various indicators.

Scoring profiles are configurable frameworks used to evaluate and compare applications on indicators like cost, risk, business value. They support strategic decision-making and enable rationalization of your business applications.

Related topics

- View all scoring profiles
- Add or edit a scoring profile
- Regenerate scoring profile indicator scores on-demand in Enterprise Architecture Workspace
- Application indicator score calculation in Enterprise Architecture Workspace
- Technology lifecycle risk score in Enterprise Architecture Workspace

Manage TRM phases

A Technology Reference Model (TRM) phase refers to a specific stage in the lifecycle of an application within the organization's TRM framework.

A TRM phase represents the status of the application, that is whether the application is approved for use, being evaluated or being scheduled for divestment.

Related topics

- View all TRM phases
- Add or edit a TRM phase

Manage TRM categories

A Technology Reference Model (TRM) category refers to a grouping of TRM software products by their purpose and function. The categorization helps you to consolidate TRM products and rationalize decisions.

TRM categories provide a structured way to classify and manage both hardware products and software models across your organization.

Related topics

- View all TRM categories
- Add or edit a TRM category

Manage information data domains

A data domain is a collection of information objects. ServiceNow® Discovery finds the database catalog that lists all the catalog objects, or databases, discovered for an instance of a database.

Information data domains enable you to define how data is captured, stored, shared, and governed across the enterprise.

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Related topics

- View information data domains
- Add or edit an information data domain

Manage architectural artifact categories

The architectural artifact categories enable you to categorize and manage artifacts more efficiently. Architectural artifact categories enable you to organize architectural artifacts and align them with your business goals and strategies.

Using architectural artifact categories, you can classify artifacts by type such as architectural decision records (ADR), URLs, and attachments.

Related topics

- View all architectural artifact categories
- Add or edit an architectural artifact category

Manage demand actions

Demand actions are strategic decisions that you want to execute for an application. Enterprise Architecture Workspace provides preconfigured actions that help you enhance the capability of the applications. You can add new demand actions as per your requirements.

Related topics

- View all demand-actions
- Add or edit a demand action

Manage Enterprise Modeling and Visualization

Enterprise Modeling and Visualization refers to the modeling and diagramming tools within the EA Workspace to represent business capabilities, business hierarchies, and their interrelationships.

The Enterprise Modeling and Visualization diagrams aren't illustrative but interactive artifacts that support planning and governance with regard to your enterprise architecture landscape. You can create, edit, and manage diagrams using ArchiMate, general, or Enterprise Architecture shapes.

Related topics

- Exploring Enterprise Modeling and Visualization in the EA Workspace
- Working with Enterprise Modeling and Visualization
- View all shape libraries
- Show or hide shapes in diagrams
- Add or edit a shape library
- Add a shape library element
- View configuration for Enterprise Architecture Workspace
- Create diagram action
- Edit a modeling configuration
- View all entities
- Add or edit an entity
- Add or update shape icon for an entity

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View relationships configurations

Add or edit a relationship

Manage certification policies

You can configure certification policies to keep your business applications inventory up to date. Keeping your business application data current helps you to assess your business applications precisely as there are indicators that are dependent on these business applications.

If you have directly installed version 4.0.0 of the EA Workspace store application, the certifications data is saved to the CMDB Data Management Task (cmdb_data_management_task) table. The data is also fetched from this table.

If you upgraded your EA Workspace from a previous version to version 4.0.0, your certification data is still fetched from the Certification Schedules (cert_schedule) table. You must migrate your certification policies to the CMDB Data Management Certification Policies (sn_cmdb_ws_dm_certification_policy) table.

Convert certification schedules to certification policies

To convert the existing certification schedules to certification policies, you must import the certification schedules into Data Manager. This process converts the certification schedules into draft certification policies and you can then publish these policies to activate them. For more information, see Import certification schedules in to Data Manager and Publish a draft Data Manager policy.

Related topics

Import certification schedules in to Data Manager

Publish a draft Data Manager policy

View all certification policies

Add or edit a certification policy

Exploring a business portfolio

As an Enterprise Architect, view the capability hierarchy, manage capabilities, and assign business applications to the capabilities.

The Business Portfolio page displays the hierarchy map for your business capabilities. You can view the number of defined business capabilities and the number of business applications that support these capabilities.

Business applications marked as **Retired** or in **End of Life** lifecycle stage aren't displayed on the Business Portfolio page. However, you can view those business applications by updating the *sn_apm_ws.business_application_default_filter* system property. Contact your ServiceNow® account service manager to update the system property.

A business capability is the ability of an organization to do its business activities successfully and fulfill its business goals. Use the business capability mapping to establish a CI relationship between the business capability and the business applications. The Business Capabilities Hierarchy page contains the following items:

- Capabilities: Total number of business capabilities.
- Leaf Capabilities: Total number of capabilities at the leaf level (that have no child capabilities of its own) in all the hierarchies of the business capabilities listed.
- Assessed: Total number of assessed business capabilities.

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- Not Assessed: Total number of capabilities that haven't been assessed.
- Major Gap: Total number of capabilities with a score in the range of 1-4.
- Medium Gap: Total number of capabilities with a score in the range of 4-7.
- No Gap: Total number of capabilities with a score in the range of 7-10.

You can create a capability or subcapability, and then assign a business application to the capability.

Business capabilities are assessed by indicators to provide indicator scores used to make strategic decisions on the business applications that support the business capability. You can sort the business capabilities by their scores.

Note: The business capability scores of the current fiscal year are displayed by default. You can change the fiscal year value using the Fiscal year filter.

By default, the first business capability in the hierarchy at level 0 expands to display its immediate child capabilities at level 1. For subsequent business capabilities and child capabilities, select the expand icon () to expand and view its subcapabilities at each level. You can see the total count of the subcapabilities below each parent capability, the total number of business applications directly related to each capability, and their capability score. When you expand a parent capability, you can see the number of subcapabilities at that level. You can also see the total count of business applications directly related to the subcapability.

Note: You can zoom on this page or any of the child pages to 200% or 400% through your browser settings without the loss of content or functionality. Page layouts are transformed into a vertical, stacked view automatically.

You can associate business capabilities with value stream stages to map your organizational capabilities to specific steps in your value streams. Value stream stages represent the discrete steps that make up a value stream, and each stage can be associated with multiple business capabilities.

To view the value stream stages associated with a business capability, open a business capability record and select the **Value Stream Stages** tab. The tab displays a read-only list of associated value stream stages, showing the name, display name, and description of each stage.

Related topics

Add a business capability

Create a demand towards achievement of a capability

Update the hierarchy of a business capability

Create a sub-capability

Assign a business application

Delete a capability from the hierarchy

Unassign a business application from a capability

View a roadmap of a business capability

Generate insights into business applications

Gantt view of TLM and TRM lifecycle timelines

A Gantt chart in the Enterprise Architecture Workspace displays TLM and TRM timelines for business applications and their associated application services.

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The TPM and TRM application timelines can be viewed in the following timeline views, in the Gantt chart.

- **Day**
- **Week**
- **Month**
- **Quarter**
- **Year**
- **Autofit**

Note: **Autofit** is selected by default.

Choose the **Select time scale** button ( ) to change the view.

Related topics

Working with Gantt chart views in EA Workspace

TLM lifecycle timelines on Gantt chart

For Technology Lifecycle Management (TLM), the business applications and their related application services (associated hardware models and software products) are displayed in a hierarchical structure. The corresponding timelines of the application services are displayed as bars on the Gantt chart.

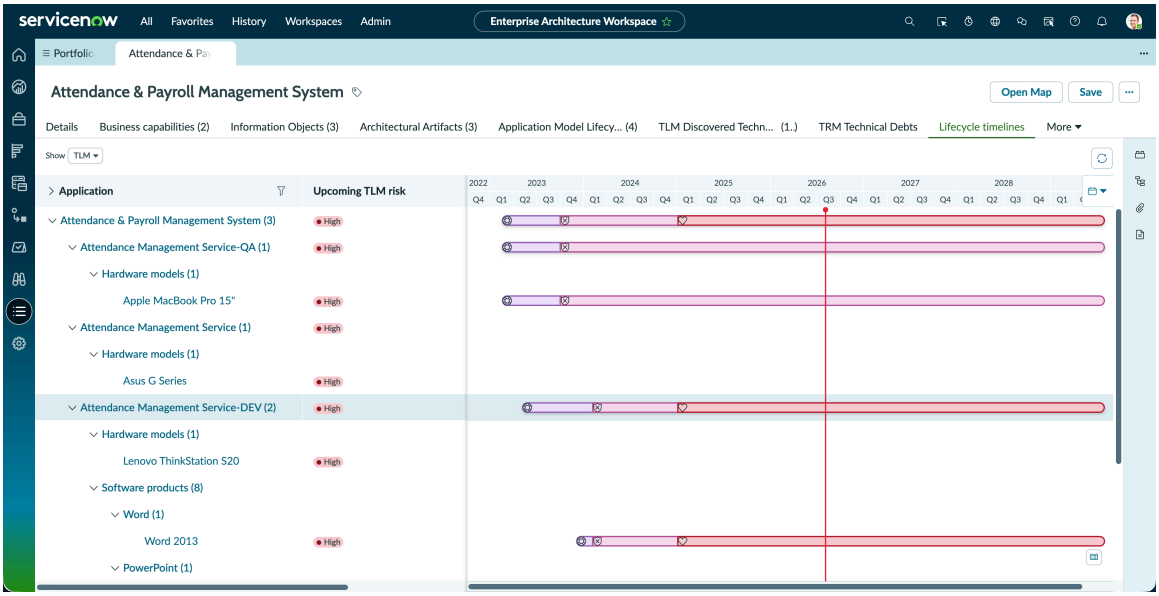
Important:

Technology Lifecycle Management (TLM) was previously known as Technology Portfolio Management (TPM). TPM and TLM refer to the same feature. Table names and scheduled job names continue to use TPM and haven't been renamed.

Whether your instance displays TPM or TLM also depends on your application versions. TLM labels appear only when both the Enterprise Architecture Workspace application (version 9.2.1 or later) and the Technology Lifecycle Management plugin, sn_apm_tpm (version 1.11.0 or later), are installed. If either application is on an earlier version, the interface continues to show TPM.

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TLM Gantt chart view



Note: The lifecycle data for software products is displayed only when the Software Asset Management (SAM) Foundation or Software Asset Management (SAM) Professional plugin is installed.

It displays the following TLM phase-related information:

- **End of support**
- **End of extended support**
- **End of life**

You can point to an individual bar in the Gantt chart to view the phase information.

The **Application** column values are populated from the TPM Discovered Technology table (sn_apm_tpm_discovered_technology).

All versions of a particular software product are grouped. Each software product has a unique combination of product name, product version, and product edition. A lifecycle record is created for each product and the timelines are displayed on the Gantt chart.

Lifecycle end-date calculation logic

For each TLM lifecycle phase, the end date of one phase is the start date of the next phase. Assuming that there are three TLM phases that are end of support, end of extended support, and end of life, the respective phase end dates are as follows:

- The end of support phase end date will coincide with the start date of the next phase, end of extended support.
- The end of extended support phase end date will coincide with the start date of the next phase, end of life.

For example, Product A has two TLM phases that are **End of Support** and **End of Extended Support**. The start date for the **End of Support** phase is 12/01/2023 and the start date for the **End of Extended Support** phase is 12/30/2023. No phase end date has been mentioned for the **End of Support** phase. In such a scenario, the end date of the **End of Support** phase will be considered as 12/30/2023.

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If only one TLM phase is available for a TLM product, then the TLM phase lifecycle end date is calculated by adding the time value as defined in the system property *sn_apm.endRangeofTPMLifecycle* with the current date. This time value enables the Gantt chart to display only known lifecycle dates.

For example, today is 12/01/2023 and the end date value as defined in the system property *sn_apm.endRangeofTPMLifecycle* is three years from the current date. Then, the end date of the phase will be 12/01/2026.

Application service and business application timelines

The application services (composed of software products and hardware models) have lifecycle timelines determined for them. On the Gantt chart, the earliest TLM phase start date of either the software products or hardware models is rolled up. This calculates the TLM phase start date of the overall application service. That is, the earliest TLM phase start date of any software product or hardware model is taken as the TLM phase start date of the application service, overall.

For example, assume that all hardware models and software products have lifecycle dates for these TLM phases: end of support, end of extended support, and end of life. Application service A consists of one software product and one hardware model. The end of support start date phase of the software product is 12/01/2023 and the end of support start date of the hardware model is 12/15/2023. The end of support start date of the software product (12/01/2023) is considered the TLM phase start date of that application service. The Gantt chart bar for that application service starts from 12/01/2023.

Similarly, the TLM phase start date of the business application is considered as the earliest TLM phase start date of any of its associated application services. For example, application X has two application services, A and B. The end of support start date of application service A is 12/01/2023 and of application service B is 12/12/2023. In this scenario, the end of support start date of application service A (12/01/2023) is considered the TLM phase start date of the business application. The Gantt chart bar for that business application starts from 12/01/2023.

TLM risk calculation

The TLM view also displays the upcoming TLM risks associated with any application services, based on their lifecycle dates. To calculate the risk associated with an application service, run the *Populate Technology Lifecycle Risks* scheduled job. For more details, see Schedule a job to generate TPM technology risk. To learn more about technology lifecycle risk, see Technology risk calculation in Enterprise Architecture Workspace.

The hardware model and software product risk scores are derived from the TPM Technology Risk table (sn_apm_tpm_technology_risk). The risk values are rolled up to the application service level. The highest risk value of hardware models and software products associated with a single application service is considered the risk value of that application service. For example, application service A consists of two hardware models and three software products. The two hardware models have moderate risk while the two software products have low risk. However, one software product has high risk. In this scenario, the risk value of the application service is considered high.

Similarly, the risk values of the application services are rolled up to the business application level. The highest risk value of an application service associated with a business application is considered the risk value of that business application. For example, business application X has three application services associated with it. The three applications services have risk values as high, moderate, and low respectively. In such a scenario, the risk value of the business application is considered as high.

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Color coding

The colors of the bars on the Gantt chart are based on their TLM phase. The TLM phase and its corresponding colors are as follows.

Color	TRM Phase
	End of support
	End of extended support
	End of life

To see the colors associated with each TLM risk type in the Upcoming TLM risk column, select the legend button ().

Related topics

View TPM and TRM lifecycle timelines on the Gantt chart

TRM lifecycle timelines on Gantt chart

For Technology Reference Model (TRM), the application services (hardware models and software products) are displayed in a hierarchical structure, similar to the TLM view. The corresponding lifecycle timelines of the application services are displayed as bars on the Gantt chart. It also displays the data for lifecycles with wild card versions. The TRM wildcard version ends with a '*'.

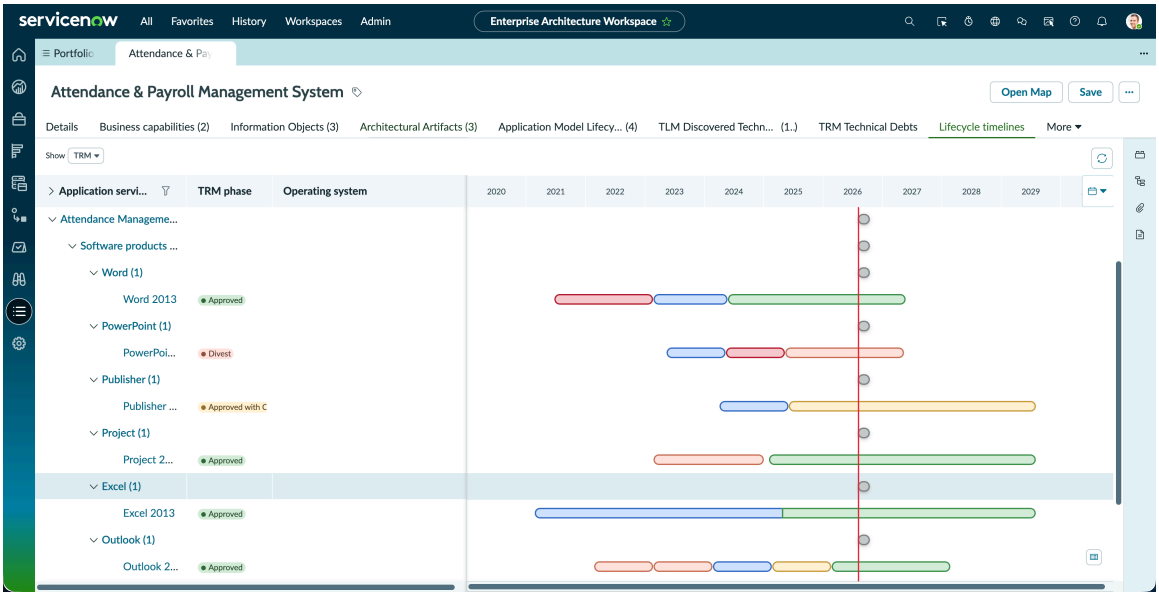
Important:

Technology Lifecycle Management (TLM) was previously known as Technology Portfolio Management (TPM). TPM and TLM refer to the same feature. Table names and scheduled job names continue to use TPM and haven't been renamed.

Whether your instance displays TPM or TLM also depends on your application versions. TLM labels appear only when both the Enterprise Architecture Workspace application (version 9.2.1 or later) and the Technology Lifecycle Management plugin, sn_apm_tpm (version 1.11.0 or later), are installed. If either application is on an earlier version, the interface continues to show TPM.

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TRM Gantt chart view



In TRM view, the lifecycles aren't aggregated to application services or business applications.

It displays the following TRM related information:

- **TRM Phase**
- **Start date**
- **End date**

You can point to an individual bar in the Gantt chart to view the phase information.

The Application services column is populated from the TPM Discovered Technology table (sn_apm_tpm_discovered_technology).

TRM phase status

The TRM view also displays the status of the TRM phases of the software products or hardware models. The TRM phase column is populated from the TRM Product Lifecycle table (sn_apm_trm_standards_product_lifecycle).

If no TRM product lifecycle data is available for an application service, then the TRM phase for that service is displayed as **Not assessed**.

If a TRM product phase doesn't have the **Production approved** check box (**Enterprise Architecture Workspace** > **Setup** > **TRM Phases**) selected, the TRM phase column displays the status as **Unapproved**. For details on how to approve a TRM phase, see Approve or reject TRM requests.

The TRM phase for an application service is displayed in the TRM phase column only when two conditions are met. The phase must be marked as production approved and the phase start date must have already passed. For example, the TRM phase **Divest** is marked as production approved and has a start date of 01-12-2023. The current date is 10-12-2023. In such a scenario, all application services associated with the TRM phase have their phase status as **Divest** in the TRM phase column.

If you have TRM products that aren't aligned with TRM phases and standards, then a TRM technical debt is created in the TRM Technical Debt (sn_apm_trm_standards_technical_debt) table. TRM technical debts are created at two levels. The following table contains information on TRM technical debts and their associated levels.

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TRM product	TRM phase	TRM level	Reason	Explanation
Not applicable	Not applicable	Product	The software isn't defined in TRM.	TRM product isn't available.
TRM Product Name	TRM Product Phase	Product	The software isn't approved for production.	TRM product isn't production approved.
TRM Product Name	Not applicable	Product lifecycle	The software version isn't defined in the TRM product lifecycle.	No TRM lifecycle is available for the TRM product.
TRM Product Name	Not applicable	Product lifecycle	The software version isn't defined in the TRM product lifecycle.	TRM lifecycle with full version information isn't available.
TRM Product Name	Not applicable	Product lifecycle	The software version isn't defined in the TRM product lifecycle.	TRM lifecycle with version information isn't available.
TRM Product Name	Not applicable	Product lifecycle	The software version isn't defined in the TRM product lifecycle.	TRM lifecycle with version information isn't available.
TRM Product Name	Lifecycle phase	Product lifecycle	The software version isn't approved for production.	TRM lifecycle with full version information isn't production approved.
TRM Product Name	Not applicable	Product lifecycle	The software version isn't approved for production.	TRM lifecycle with full version isn't available for current date.
TRM Product Name	Lifecycle phase	Product lifecycle	The software version isn't approved for production.	TRM lifecycle with version and edition information isn't production approved.

For details on TRM technical debts, see TRM technical debt.

You can schedule the *Populate TRM technical debts in the EA Workspace* job to update the TRM technical debt data in the EA Workspace. For more information, see Update TRM technical debt data using scheduled job.

Lifecycle end-date calculation logic

Entering an end date isn't required while creating a TRM product lifecycle.

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For each TRM lifecycle phase, the end date of one phase is the start date of the next phase. For example, application service A has two TRM phases that are **Divest** and **Approved with Constraints**. The start date for the **Divest** phase is 01-12-2023 and the start date for the **Approved with Constraints** phase is 30-12-2023. No phase end date has been mentioned for the **Divest** phase. In such a scenario, the end date of the **Divest** phase is considered as 30-12-2023. An error message is displayed if the product lifecycle dates overlap.

For the last phase, the end date is calculated by adding the time value as defined in the system property *sn_apm.endRangeofTPMLifecycle* with the current date. For example, today is 01-12-2023 and the end date value as defined in the system property *sn_apm.endRangeofTPMLifecycle* is three years from the current date. Then, the end date of the phase will be 01-12-2026.

Application service timelines

The TRM product lifecycle timeline bars are displayed on the Gantt chart. However, for the lifecycle timeline bars to be displayed, some criteria must be fulfilled.

- Software products: For software products, the TRM product **Name** and **Product full version** values for that particular software product as defined in the TPM Technology Lifecycle table (sn_apm_tpm_technology_lifecycle) should match the **TRM Product** and **Version** values that are entered while creating the TRM lifecycle for that product.

  Alternatively, the TRM product **Name**, **Version**, and **Edition** values in the TPM Technology Lifecycle table (sn_apm_tpm_technology_lifecycle) should match the **TRM Product**, **Version**, and **Edition** values entered when creating the TRM lifecycle for that product.

- Hardware models: For hardware models, the TRM product hardware model value for that application service should match the hardware model value in the lifecycle. This value is entered when creating the TRM lifecycle for that application service.

For details on how to create a TRM product, see Create a TRM product in Enterprise Architecture Workspace.

For details on how to create a TRM product lifecycle request, see Create TRM product lifecycles in Enterprise Architecture Workspace.

For details on how to approve or reject a TRM product or lifecycle request, see Approve or reject TRM requests.

Color coding

The colors of the TRM lifecycle timeline bars are based on their TRM phase status. To see the colors associated with each TRM phase status, select the **Legend** button ().

You can also change the TRM phase colors according to your requirement. For details on how to modify existing TRM phase colors, see Add or edit a TRM phase.

Related topics

View TPM and TRM lifecycle timelines on the Gantt chart

Rationalization of business applications

As an Enterprise Architect, you can use application rationalization to evaluate your business applications.

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Application rationalization overview

Rationalize all business applications in a category and decide whether to invest, sustain, migrate, or retire an application.

Select the application rationalization icon ( ) to navigate to the Application Rationalization page.

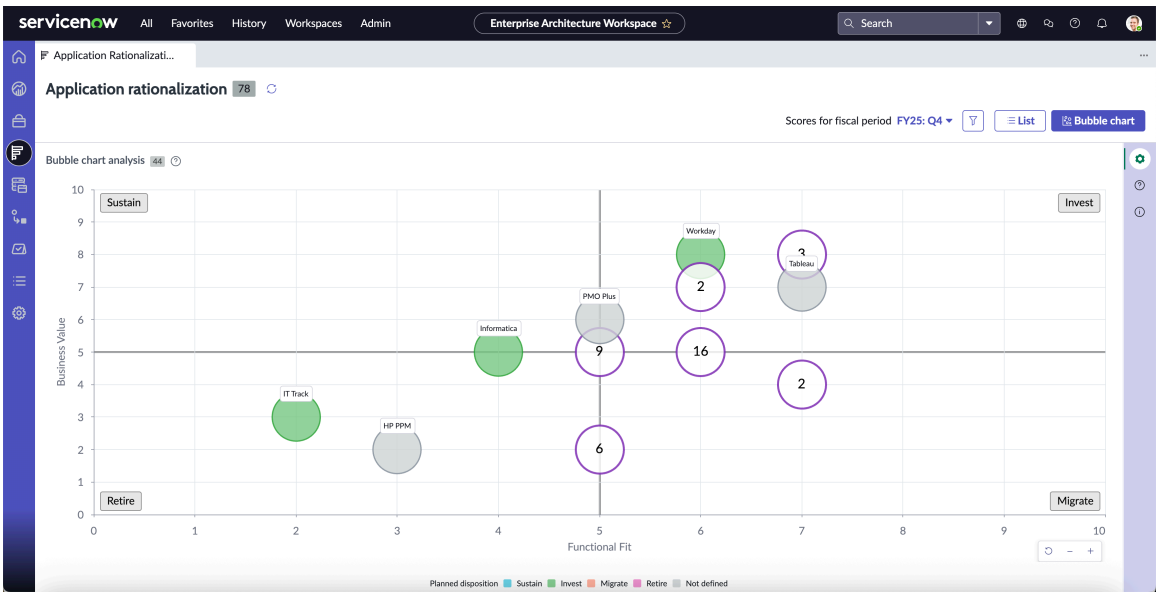
You can perform the following using application rationalization:

- Analyze business applications based on multiple scores.
- Create a demand for a business application.
- Set the planned disposition of a business application.
- Add life-cycle details to an existing business application.

You can view all the business applications in a bubble chart view or in a list view. However, business applications marked as **Retired** or in **End of Life** lifecycle stage aren't displayed on the Application Rationalization bubble chart or list view pages. However, you can view those business applications by updating the *sn_apm_ws.business_application_default_filter* system property. Contact your ServiceNow® account service manager to update the system property.

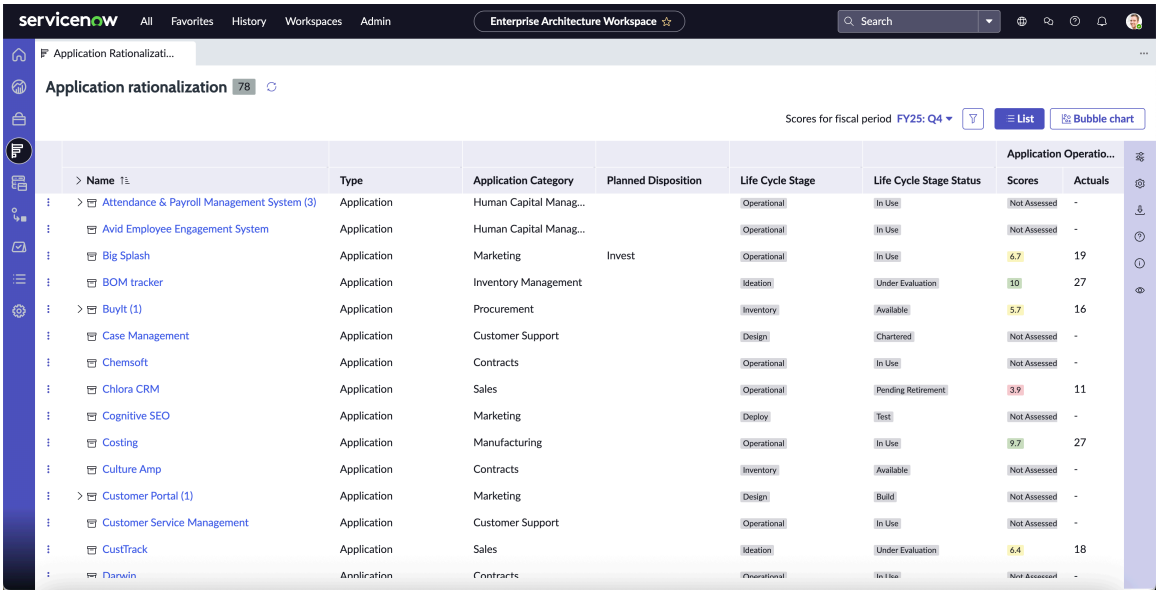
You can also generate insights into business applications using Now Assist. For information, see Generate insights into business applications.

Bubble chart view



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List view

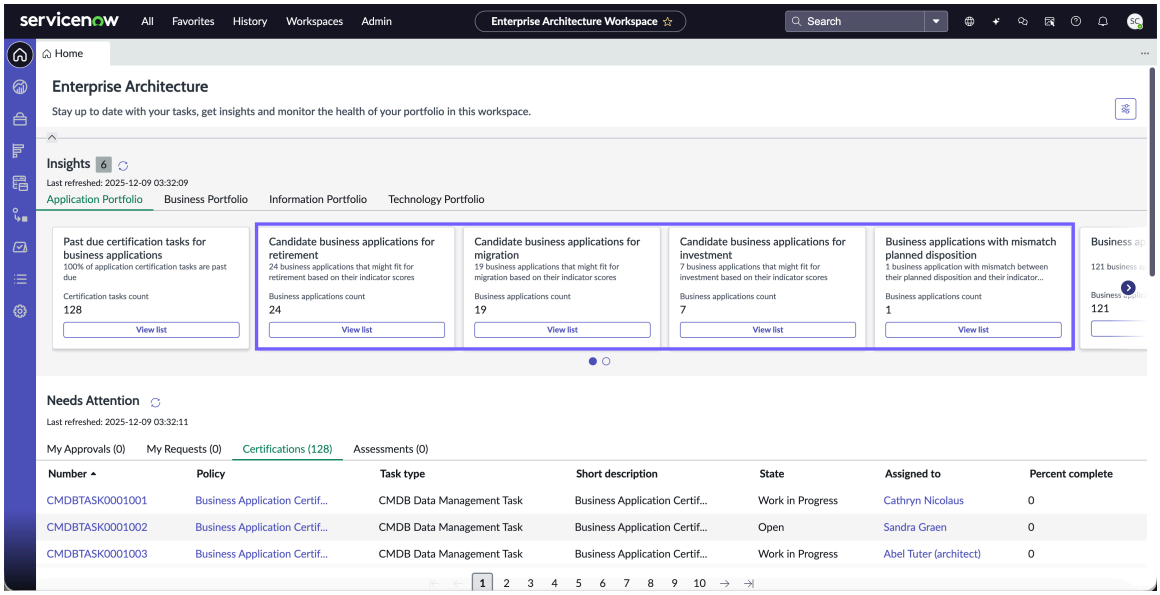


Application rationalization insights on the Enterprise Architecture Workspace home page

The application rationalization feature of Application Portfolio Management also provides insights for your business applications. To see the insight cards, navigate to **Workspaces** > **Enterprise Architecture Workspace** and select the Insights section. The insights cards display information based on scores derived from application rationalization. The following insight cards are available:

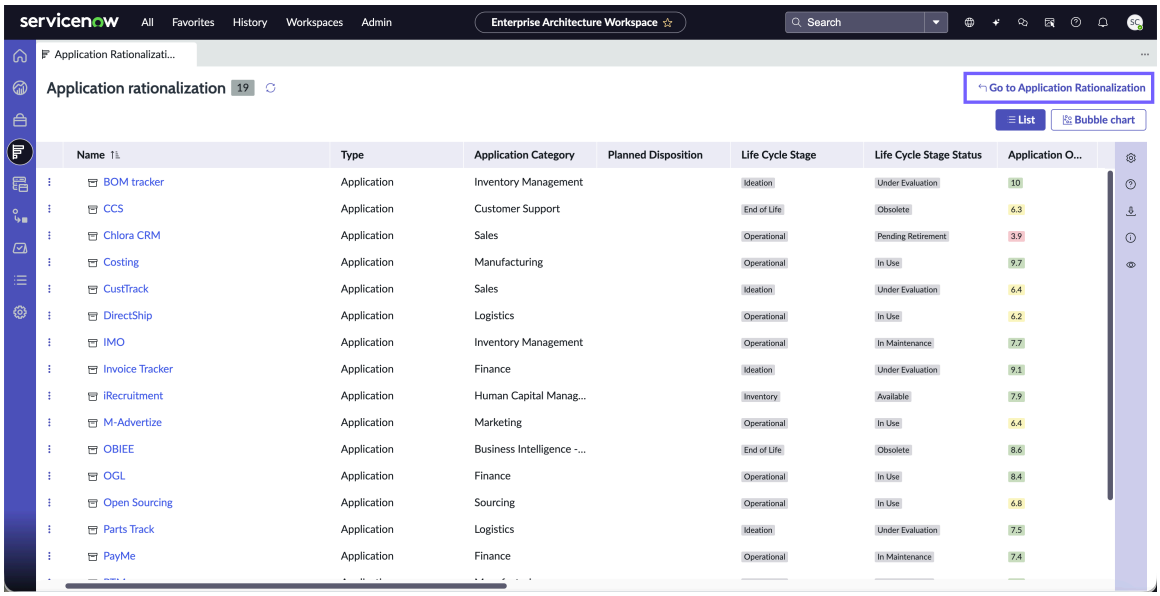
- **Candidate business applications for retirement**-business applications that might fit for retirement based on their indicator scores.
- **Candidate business applications for migration**-business applications that might fit for migration based on their indicator scores.
- **Candidate business applications for investment**-business applications that might fit for investment based on their indicator scores.
- **Candidate business applications with mismatch planned disposition**-business application with mismatch between their planned disposition and their indicator scores.

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On selecting a particular card, the Application Rationalization page appears to display the relevant business application data, based on your selection.

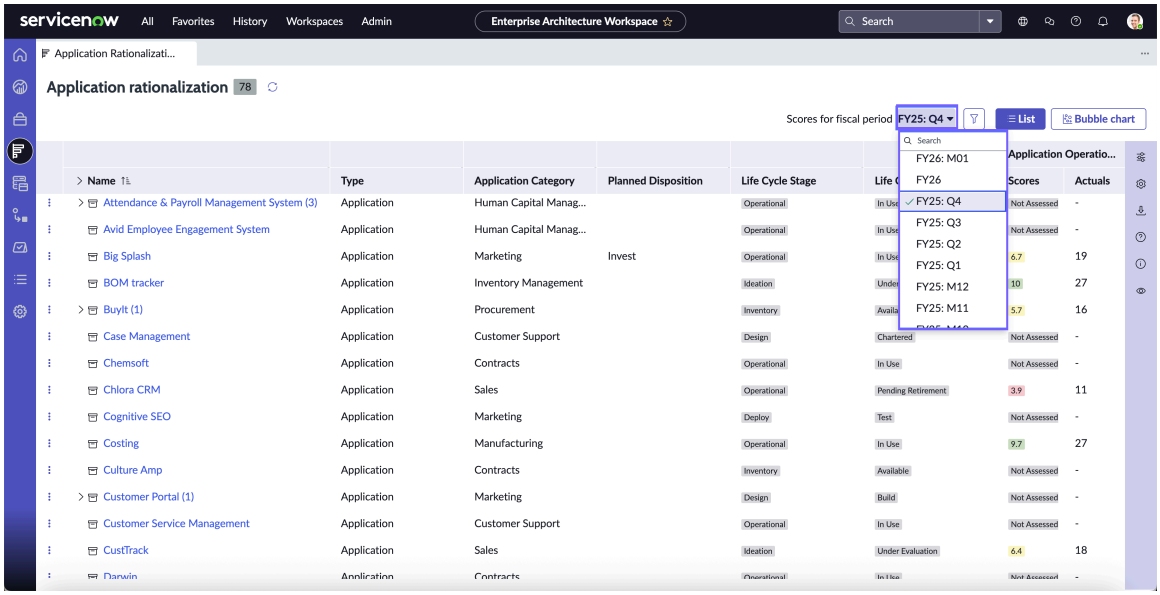
Note: To return to the main Application Rationalization page, select **Go to Application Rationalization**.



Indicator scores based on fiscal period

All the indicator scores are displayed according to the latest fiscal period, by default. You can also select a different fiscal period from the Scores for fiscal period list. Your fiscal period preferences are saved and applied the next time you visit the page.

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The latest fiscal period is derived from the apm_app_indicator_score list. The fiscal period type (month, quarter, or year) is derived from the system property *`com.glide.fiscal_calendar.fiscal_unit`*.

Note: You can zoom on this page to 200% or 400% through your browser settings without the loss of content or functionality. Page layouts are transformed into a vertical, stacked view automatically.

Related topics

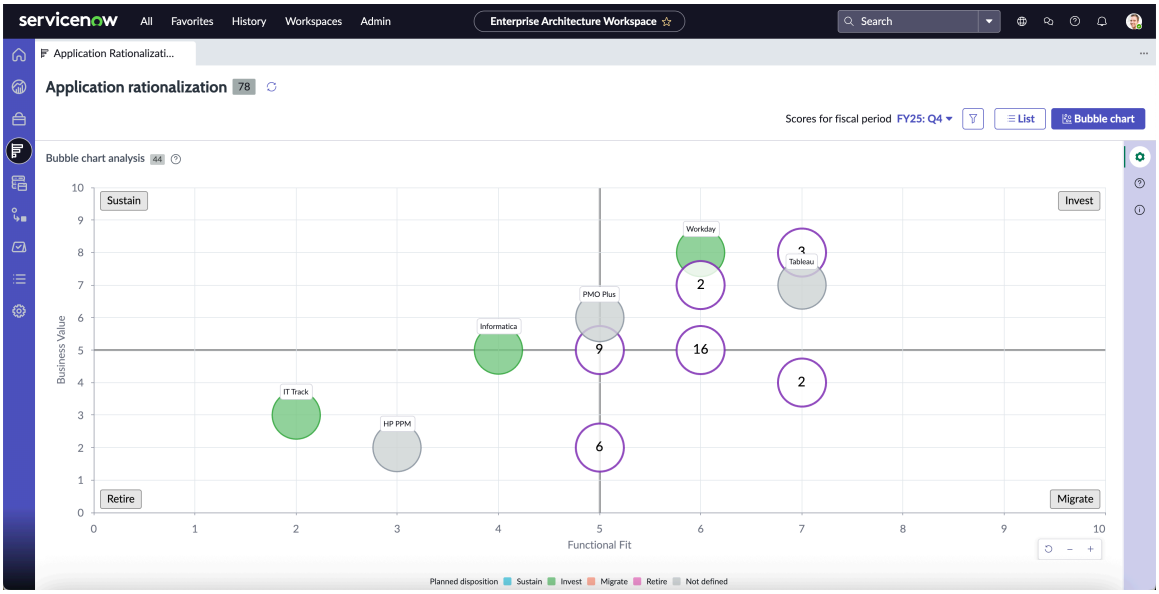
- Working with application rationalization
- Generate insights into business applications
- Application indicator score calculation in Enterprise Architecture Workspace
- Technology lifecycle risk score in Enterprise Architecture Workspace
- Tech debt indicator score for application rationalization

Bubble chart view of application rationalization

Bubble charts are interactive graphs that position applications in different quadrants, based on their indicator scores. Based on the position of the business application in the quadrants, enterprise architects can take decisions to invest in, sustain, migrate, or retire the business applications.

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Bubble chart view



Overview of the bubble chart

Select the application rationalization icon ( ) and select the **Bubble chart** tab to view the bubble chart view of all business applications.

Use the bubble chart to view indicator scores of business applications in the X and Y axes and specify the bubble sizes. You can use these scores to measure how your applications are aligned to your business strategy and then create demands for the applications.

You can also create your own application indicators to analyze business applications in the bubble chart. For information on how to create custom application indicators, see Add or edit an application indicator.

Note:

- The created indicator must also be attached to the default application profile. For information on how to attach new profile indicators with a scoring profile, see Attach a profile indicator to a scoring profile.
- If the created indicator isn't displayed in the bubble size list, verify that the indicator is active. For information on how to activate an indicator, see Activate or turn off an application or capability indicator.

You can also generate insights into business applications using Now Assist. For information, see Generate insights into business applications.

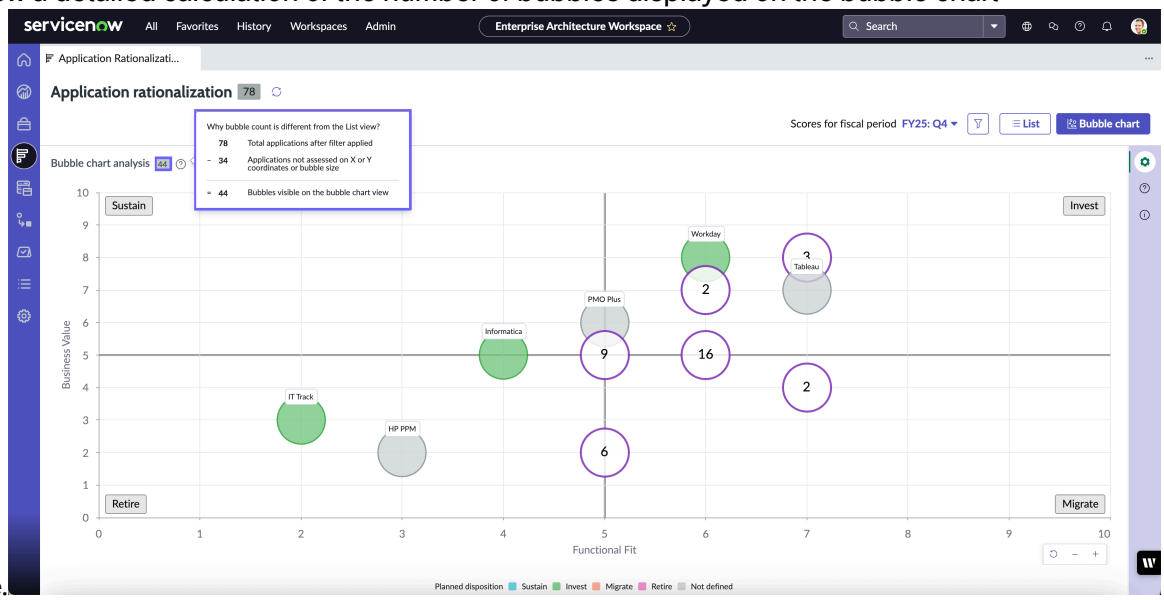
Bubbles displayed on the chart

The bubble chart displays only the assessed business applications. Also, business applications marked as **Retired** or in **End of Life** lifecycle stage aren't displayed on the Application Rationalization bubble chart page. However, you can view those business applications by updating the *sn_apm_ws.business_application_default_filter* system property. Contact your ServiceNow® account service manager to update the system property. Therefore, the number of bubbles displayed on the chart can be different from the number of business applications displayed on the list view page.

The total number of business applications displayed as bubbles on the bubble chart page is displayed at the top of the chart. You can also select the bubble count details icon ( )

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to view a detailed calculation of the number of bubbles displayed on the bubble chart page.

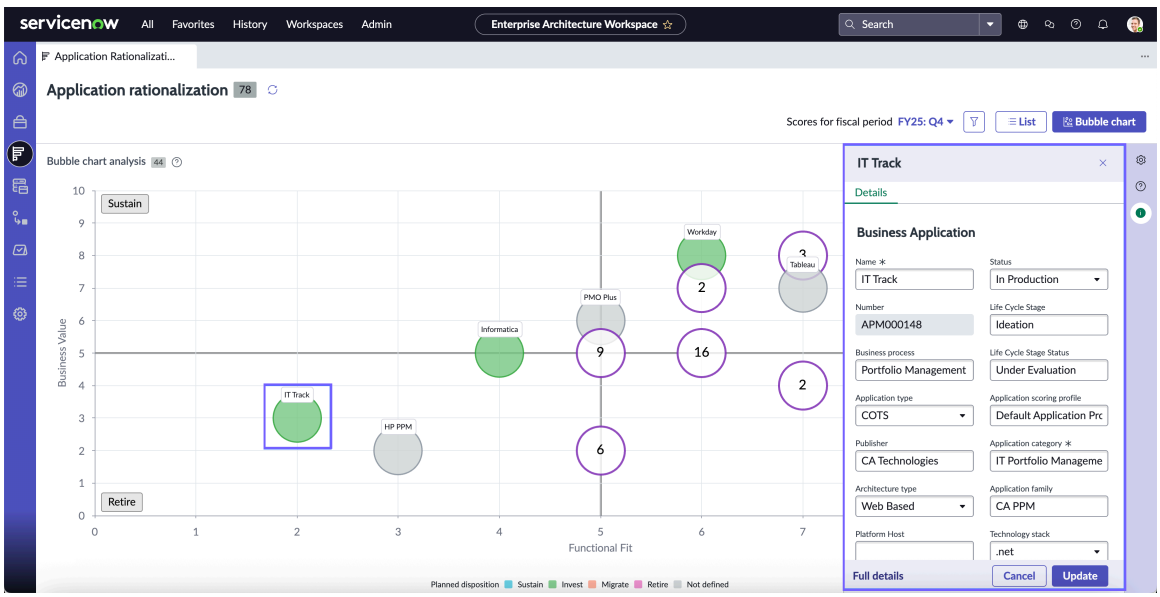


Understanding the bubble chart

The bubble chart page has the following components:

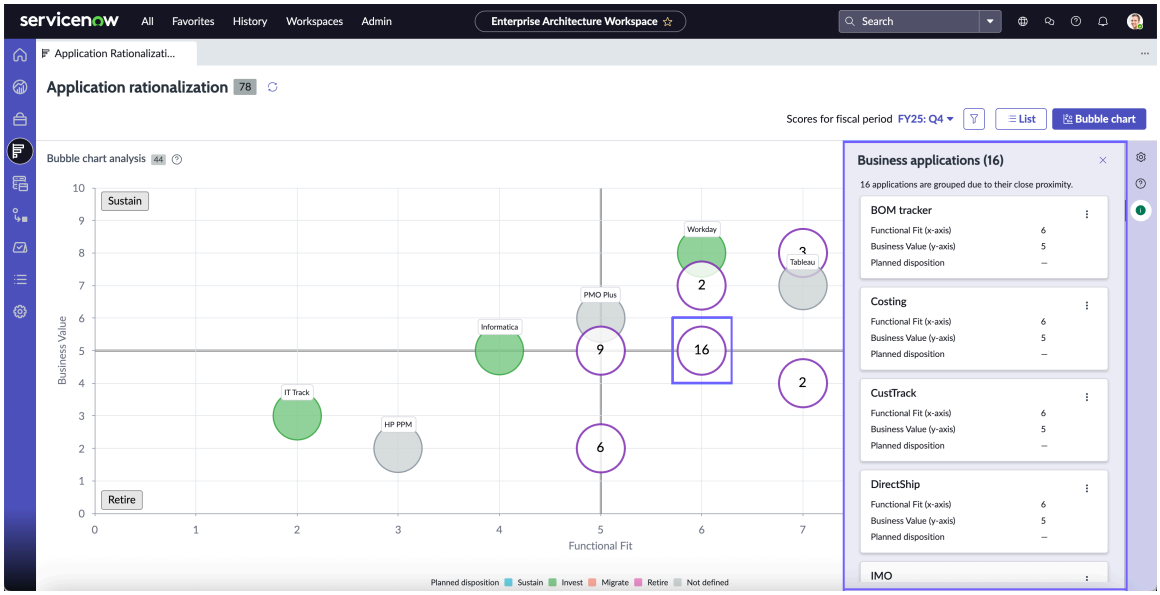
- X and Y axes: Each axis represents a metric category.
- Bubbles: Each labeled bubble represents a business application. Hover over a bubble to view an assessable record score summary.

On selecting a bubble, the business application data associated with that bubble is displayed in the info pane.



Business application bubbles whose X and Y-axis values are within the value range of +/-0.25 of each other, are grouped. A grouped bubble displays the total number of business application bubbles that it contains. One selecting a grouped bubble, the info pane appears, displaying the list of individual business applications that are part of the grouped bubble. On selecting a particular business application card, the associated business application data is displayed in the info pane.

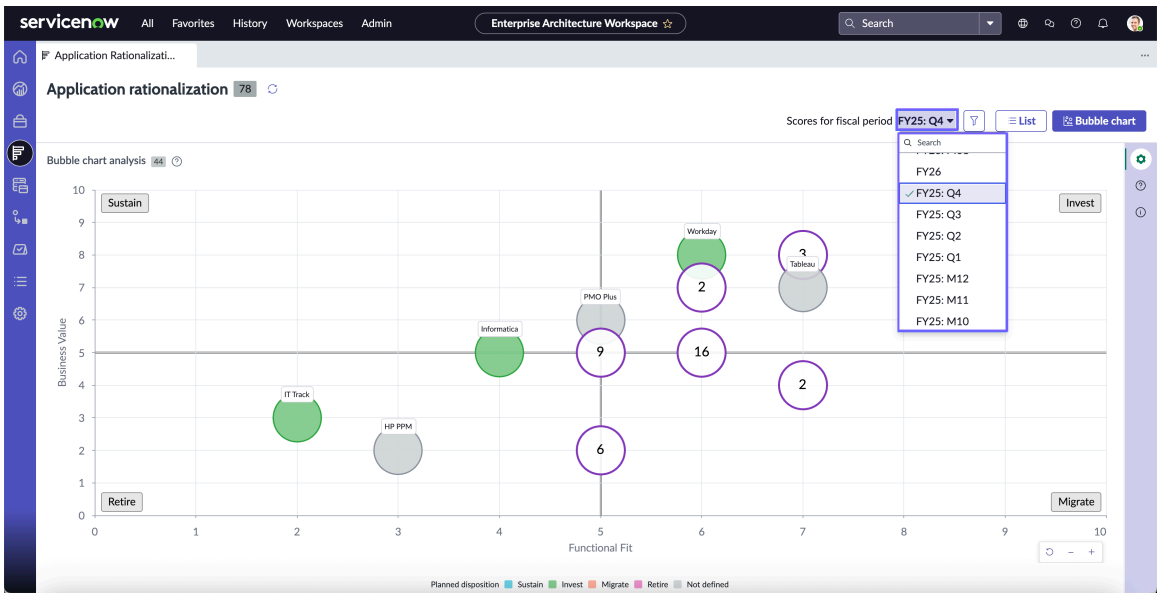
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The bubble color is dependent on the planned disposition value that was already set for the business application. You can refer to the legend displayed on the bubble chart to see the significance of each color.

The bubbles are of different sizes, based on the indicator score values that you select.

All the indicator scores are displayed according to the latest fiscal period, by default. The latest fiscal period is derived from the apm_app_indicator_score list. The duration of a fiscal period is derived from the system property *com.glide.fiscal_calendar.fiscal_unit*. You can also select a different fiscal period from the Scores for fiscal period list. Your fiscal period preferences are saved and applied the next time you visit the page.



The bubble chart displays up to 500 bubbles representing business applications, by default. If you want to see more than 500 bubbles, you can configure the *sn_apm_ws.appRationalizationMaximumBubbles* system property. For details, see Change the number of bubbles displayed on the bubble chart.

You can use the available filters to reduce the number of business application bubbles displayed on-screen. You can use the advanced filter to find business applications by applying specific

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criteria, such as application details, application indicators and scores, and associated business capabilities. Your filter preferences are saved and applied the next time you visit the page.

For more information, see Apply filters on the Application Rationalization page.

Actions available on the bubble chart page

You can perform the following by hovering over a bubble in the chart and then selecting the context menu:

- Create a demand for a business application. For more information, see Create a demand using the bubble chart.
- Set the planned disposition of a business application. For more information, see Set the planned disposition of a business application.
- Add business application lifecycle data. For more information, see Add business application lifecycle data using bubble chart.

Zoom or pan on the bubble chart

You can zoom in, zoom out, or pan on the bubble chart page using either on-screen buttons or by using a mouse device or trackpad interactions.

Bubble chart screen interactions

Interaction Method	Zoom in	Zoom out	Pan
On-screen button	Select the zoom in icon (+) **Note:** Select the zoom reset icon (↺) to reset to the default zoom level.	Select the zoom out icon (−) **Note:** Select the zoom reset icon (↺) to reset to the default zoom level.	Not applicable
Track pad	• Place the cursor on a specific point on the bubble chart and double click on the trackpad • Select an area on the bubble chart	Select the zoom out icon (−) **Note:** Select the zoom reset icon (↺) to reset to the default zoom level.	Press and hold Shift key and then click and move the cursor **Note:** For the pan functionality to work, you must be zoomed in on a particular area on the bubble chart.

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Bubble chart screen interactions (continued)

Interaction Method	Zoom in	Zoom out	Pan
Mouse device	• Double click on a particular section of the chart • Select an area on the bubble chart	Select the zoom out icon (⁻) **Note:** Select the zoom reset icon (↺) to reset to the default zoom level.	Press and hold Shift key and then click and move the cursor **Note:** For the pan functionality to work, you must be zoomed in on a particular area on the bubble chart.

Note: You can zoom on this page to 200% or 400% through your browser settings without the loss of content or functionality. Page layouts are transformed into a vertical, stacked view automatically.

Related topics

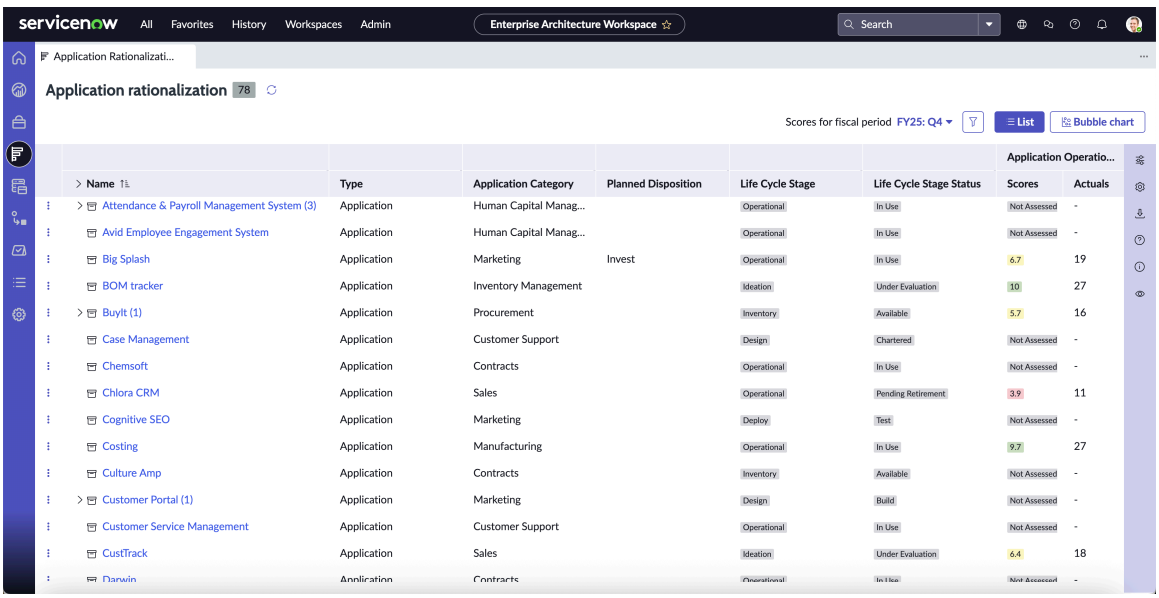
Analyze applications using the bubble chart

Generate insights into business applications

List view of application rationalization

As an Enterprise Architect, you can view the list of all business applications. The List view enables you to see high-level information on all your business applications and all the indicator scores that are attached to them.

List view



Overview of the list view

The list view of application rationalization enables you to view all available applications based on your scoring profile, in your enterprise architecture landscape. For details, see Configure scoring profiles.

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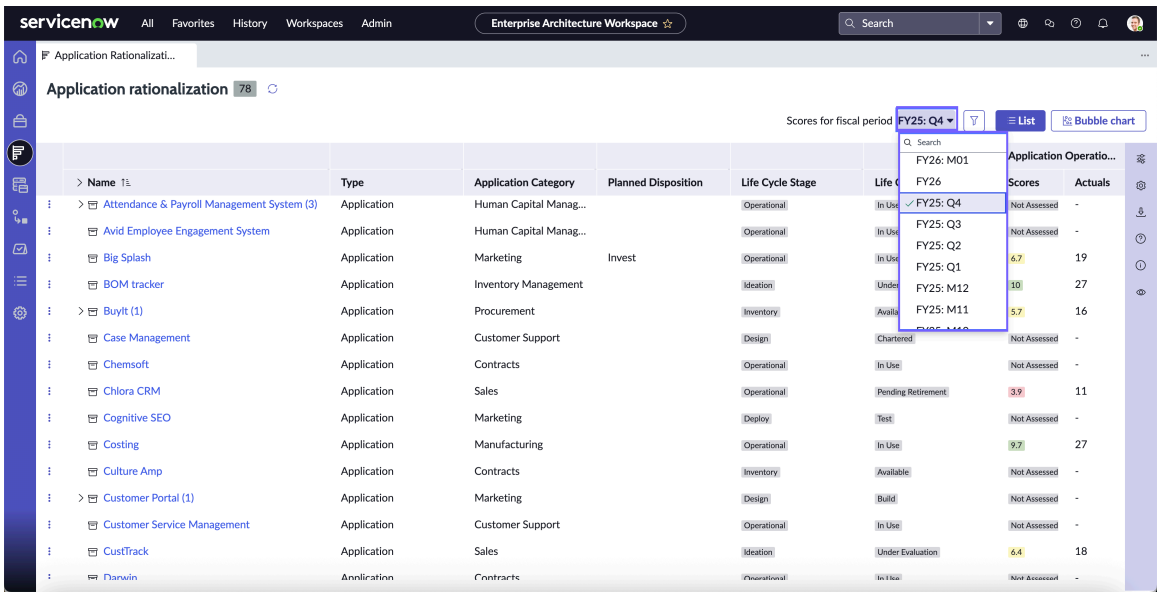
You can perform side-by-side comparison of application scores and indicators across multiple dimensions.

You can also create your own application indicators to analyze business applications in the List view. For information on how to create custom application indicators, see Add or edit an application indicator. The new custom indicators appear as new columns in the list view.

Note:

- The created indicator must also be attached to the default application profile. For information on how to attach new profile indicators with a scoring profile, see Attach a profile indicator to a scoring profile.
- If the created indicator isn't displayed in the list, verify that the indicator is active. For information on how to activate an indicator, see Activate or turn off an application or capability indicator.

All the indicator scores are displayed according to the latest fiscal period, by default. You can also select a different fiscal period from the Scores for fiscal period list. Your fiscal period preferences are saved and applied the next time you visit the page.



The latest fiscal period is derived from the apm_app_indicator_score list. The duration of a fiscal period is derived from the system property *com.glide.fiscal_calendar.fiscal_unit*.

You can select the name of a business application to open it and view its associated details.

Also, you can select the expand row icon ( ) to see the demands and projects associated with that business application. On selecting a demand or a project, its details are displayed. You can modify business application details and its associated demand and project details, as required.

Business applications marked as **Retired** or in **End of Life** lifecycle stage aren't displayed on the Application Rationalization List view page. However, you can view those business applications by updating the *sn_apm_ws.business_application_default_filter* system property. Contact your ServiceNow® account service manager to update the system property.

You can also generate insights into business applications using Now Assist. For information, see Generate insights into business applications.

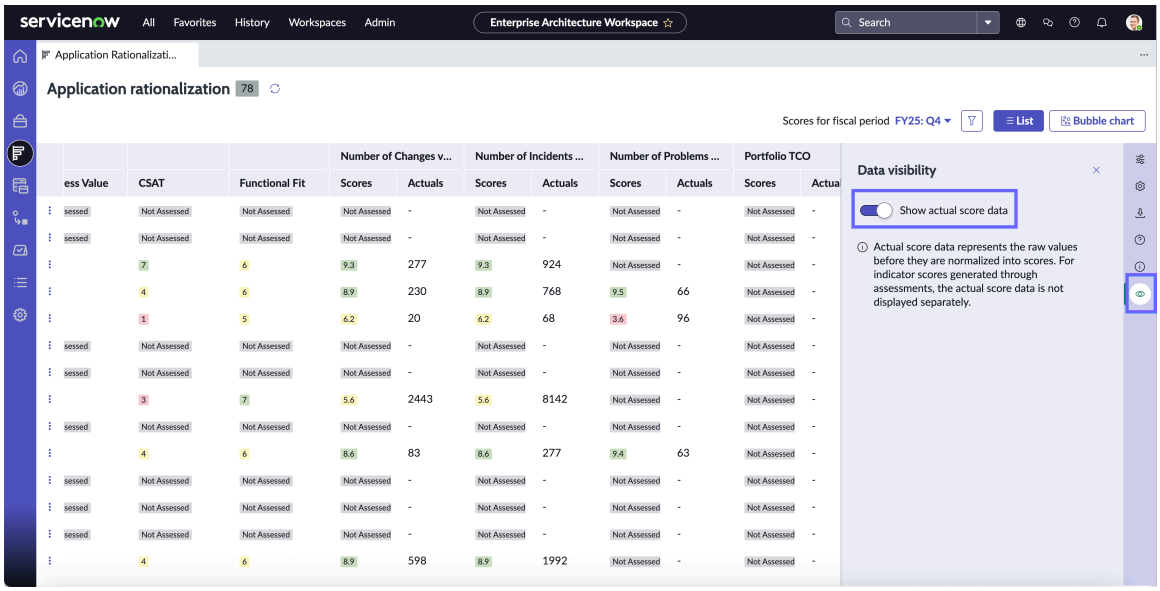
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View and compare actual and normalized indicator scores

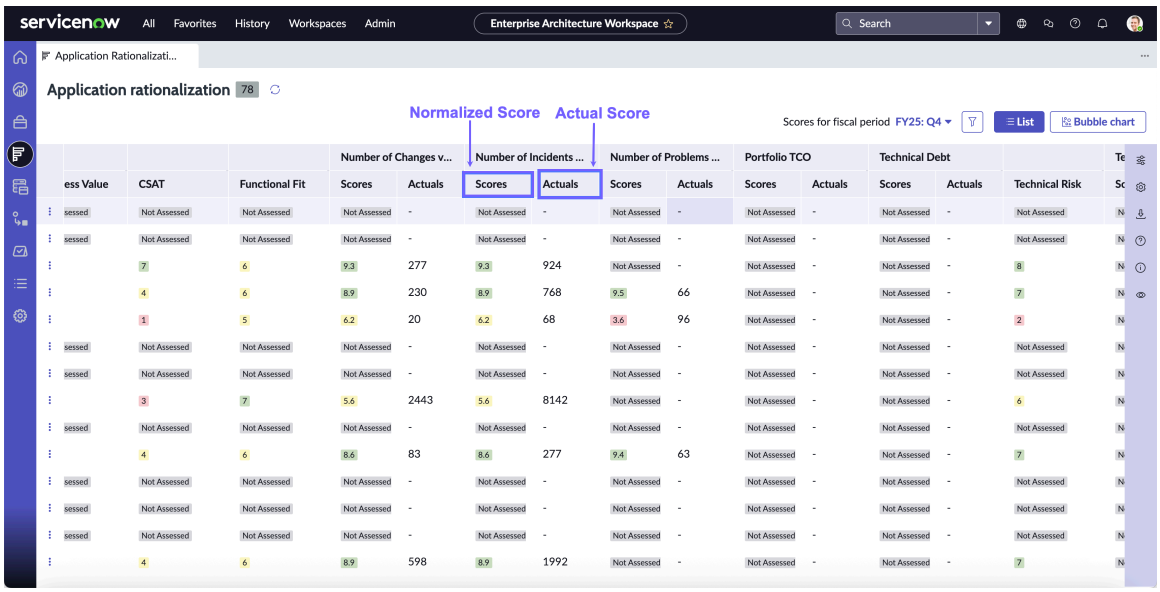
You can view the actual indicator scores for a business application on the list view page and compare them with the normalized scores. Actual scores refer to the raw value of the indicator as captured from its source. These values aren't scaled and can vary widely across applications, depending on the underlying data.

The normalized score refers to the scaled value of an indicator, derived from the actual score using a normalization formula. This enables all indicator scores to fit into a common range. Normalized scores ensure comparability across different indicators with varying units and ranges.

To view the actual scores of indicators, select the data visibility icon ( ) and then enable the **Show actual score data** toggle.



The actual indicator scores and their normalized values for business applications are displayed. For example, the actual column for the Number of Incidents indicator displays the actual number of incidents associated with the business application during the selected fiscal period.



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Note: The Portfolio TCO indicator displays currency values in the format specified in the *glide.currency2.default_reference_currency* property. If this property isn't configured, the currency values are displayed in US dollar (USD) format by default.

Your display preferences are saved and applied the next time you visit the page.

Actions available on the list view page

You can perform the following from the list view page:

- Edit business application details. For more information, see Edit business application details in list view.
- Create a demand for a business application. For more information, see Create a demand using the list view.
- Set the planned disposition of a business application. For more information, see Set the planned disposition of a business application.
- Add the business application lifecycle data. For more information, see Add business application lifecycle data using the list view.
- You can add or hide the displayed columns according to your requirement by selecting the Personalize icon ( ). Your display preferences are saved and applied the next time you visit the page.
- Export the list view data to Microsoft Excel or CSV. For more information, see Export application rationalization data to Excel or CSV.

Note: You can zoom on this page to 200% or 400% through your browser settings without the loss of content or functionality. Page layouts are transformed into a vertical, stacked view automatically.

Related topics

Edit a demand associated with a business application

Edit a project associated with a business application

Export application rationalization data to Excel or CSV

Apply filters on the Application Rationalization page

Generate insights into business applications

Exploring Portfolio list view

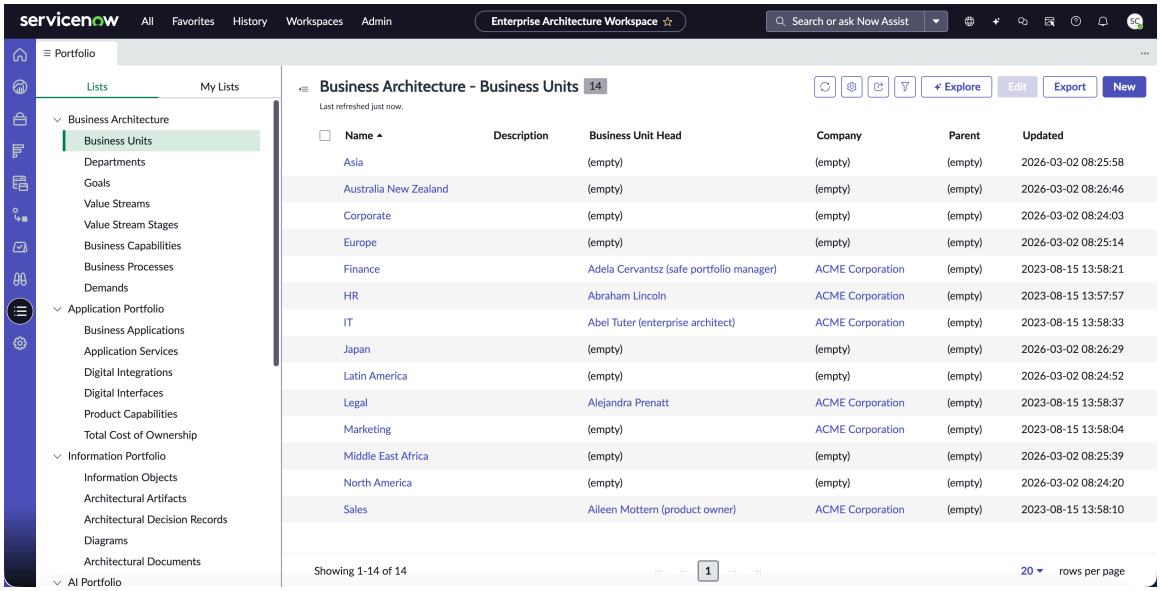
As an Enterprise Architect, use the Portfolio list view in the Enterprise Architecture Workspace to manage your business architecture, application portfolio, technology portfolio, and information portfolio. You can also manage your own entities.

The My Lists view shows a list of records that you have been assigned. Select the filter icon ( ) to check the applied fields.

You can save, filter and export, or email the list. You can also create your own list and access it from the My Lists page.

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List view



Note: In the Lists view, the Digital Integrations and Digital Interfaces are displayed only when the Digital Integration Management plugin (com.snc.apm_di) is installed. The Diagrams tab under Architectural Artifacts is displayed in the list only when the Lucidchart Integration plugin (sn_lcdchart_int) is installed.

Lists

The Lists view enables you to manage your portfolios and all your own entities.

You can see the following portfolio items in the **Portfolio > List** view:

- Business Architecture
- Application Portfolio
- Information Portfolio
- My Entities

My Lists

Any list that you create appear in the My Lists section. Lists in this section are only visible to you.

Note: You can zoom on this page or any of the child pages to 200% or 400% through your browser settings without the loss of content or functionality. Page layouts are transformed into a vertical, stacked view automatically.

Related topics

Working with Portfolio list view

Exploring the business architecture

The Business Architecture section within the Portfolio page of the Enterprise Architecture Workspace helps you in the structuring of your business functions and strategies.

Related topics

Using business architecture

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Exploring business units

Business units are part of your organization that are responsible for certain operations and have their own objectives.

Business units usually comprise departments and they have their own set of requirements regarding hardware and software, to meet their organizational objectives.

Using the Enterprise Architecture Workspace, business units can manage their business applications effectively.

You can also associate a business unit with the business processes it owns and the business capabilities it uses. This shows how your organizational structure maps to what your organization does and how it does it.

Note: Before Australia Patch 5, a business capability or business process could be associated with only one business unit, using a **Business Unit** field on the form. This field has been removed from the default form view and replaced with the **Related business units** related list, which lets you associate a business capability with multiple business units. The Business Unit field still exists on the table — administrators can add it back to the form from Form Layout if needed. Associations that existed before the upgrade are not automatically migrated; you must explicitly add the business unit to the Related business units related list.

Related topics

- View all business units
- Add or edit a business unit
- Add a business process to a business unit
- Remove a business process from a business unit
- Add a business capability to a business unit
- Remove a business capability from a business unit

Exploring departments

Departments are specialized functional areas within an organization, having their own specified roles and objectives. Departments are subsets of business units.

Each department contributes to the overall strategy and goals of its related business unit. Using the Enterprise Architecture Workspace, departments can be associated with the relevant business units and the business applications that each department uses can be tracked efficiently. This enables for effective alignment of technology and applications with the requirements and objectives of both the department and its associated business unit.

You can also add users to a department.

Related topics

- View all departments
- Add or edit a department
- Add a user to a department

Exploring goals

Goals are important for aligning and optimizing investments in business applications and for driving strategic outcomes.

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You can define and track goals and their outcomes as objectives. This enables the prioritization and effective allocation of business applications, confirming the adherence to the organization's strategic needs and objectives.

Using the Enterprise Architecture Workspace, you can perform the following:

- Create goals and assign contributors
- Track goals to completion
- Add quantitative targets to goals
- Add qualitative targets to goals
- Add sub-goals
- Add demands to a goal
- Associate a goal with the business processes and business capabilities

A goal is mapped to a business process, and to a business capability, using the relationship type **Realizes :: Realized by**.

Related topics

View all goals

Add or edit a goal

Add a quantitative target to a goal

Add a qualitative target to a goal

Create a sub-goal

Add a business process to a goal

Remove a business process from a goal

Add a business capability to a goal

Remove a business capability from a goal

Exploring value streams

In Enterprise Architecture, a value stream represents an end-to-end sequence of activities that delivers value in your enterprise architecture landscape. A value stream is made up of individual value stream stages, each of which represents a discrete step in that sequence.

A value stream is a sequence of activities that helps you visualize the flow of a process from start to finish. It shows the value of each step and the application models associated with each step.

Hire to Retire is a value stream that encompasses the lifecycle of an employee within an organization, from the time they are hired until they retire. This value stream will containing stages such as onboarding, development, retention, offboarding, etc.

Related topics

View value streams details

Add or edit a value stream

Add value stream stages to a value stream

Associate an application model to a value stream

Exploring value stream stages

Manage value stream stages

Exploring a business portfolio

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Exploring value stream stages

Value stream stages are a specific section within the overall value stream, encompassing a specific set of activities.

A value stream is made up of multiple value stream stages. The stages are organized in a sequence, ensuring that each stage add value to the overall value stream.

The following relationships define the value stream stage model in Enterprise Architecture:

- Value stream to value stream stages: A value stream contains one or more value stream stages. Each stage represents a step in the end-to-end value delivery sequence and is assigned a numeric order that determines its position within the value stream.
- Value stream stage to business processes (many-to-many): A value stream stage can be associated with one or more business processes. A business process can also be associated with multiple value stream stages across different value streams. This association helps you understand which workflows support each step of value delivery.
- Value stream stage to business capabilities (many-to-many): A value stream stage can be associated with one or more business capabilities. A business capability can also support multiple value stream stages. This association helps you understand which organizational capabilities are required to deliver each stage.

In the Hire to Retire value stream, onboarding of new employees is a value stream stage.

Related topics

View value stream stage details

Add or edit a value stream stage

Exploring business capabilities

A business capability is the ability of an organization to do its business activities successfully and fulfill its business goals.

Use the business capability mapping to establish a CI relationship between the business capability and the business applications. Establish a similar relationship between business capabilities and the application technologies to ascertain the risks involved in using them.

As business organizations grow, it's imperative for an enterprise architect to assess the business capabilities to know how to strengthen the business processes.

From the Portfolio page in Enterprise Architecture Workspace, you can perform the following:

- Create a business capability
- View existing business capabilities
- Add a sub-capability
- Add architectural artifacts to a business capability
- Associate a business capability with the business unit that uses it

You can also view and add business capabilities and perform a host of other tasks relating to business capabilities, from the Business Portfolio page. For more information, see Exploring a business portfolio.

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Note: Before Australia Patch 5, a business capability could be associated with only one business unit, using a **Business Unit** field on the form. This field has been removed from the default form view and replaced with the **Related business units** related list, which lets you associate a business capability with multiple business units. The Business Unit field still exists on the table — administrators can add it back to the form from Form Layout if needed. Associations that existed before the upgrade are not automatically migrated; you must explicitly add the business unit to the Related business units related list.

Related topics

- View all business capabilities on the Portfolio page
- Add or edit a business capability from the Portfolio page
- Create a sub-capability from the Portfolio page
- Create a Lucidchart diagram for a business capability in the Enterprise Architecture Workspace
- Manage architectural artifacts of a business capability
- Add or remove business capabilities from a value stream stage
- Add a business unit to a business capability
- Remove a business unit from a business capability

Exploring business processes

Business processes model how your organization performs work to achieve a business outcome. Use business processes in Enterprise Architecture Workspace to build a process hierarchy and to associate processes with supporting business applications.

You can create business processes or modify an existing one to align it with your business requirements.

Based on your requirements, model a business process hierarchy by creating parent-child relationships between business process records using CI relationships.

A business process or capability hierarchy is an ordered grouping of business processes in a hierarchical fashion.

Business process hierarchies can include multiple levels (L0, L1, L2, and deeper). Use CI relationships to create parent-child relationships between business process records and build the hierarchy over time.

Example: L0 and L1 business processes

L0 signifies the high-level process encompassing all activities associated with that process. For example, in the IT service management business process, the L0 business process encompasses all activities related to managing IT services within the organization.

L1 signifies the specific tasks within the L0 business process. For example, within the IT service management business process, incident management is an L1 business process which specifically deals with logging, categorizing, and resolving incidents.

L2 (and deeper) levels represent more specific sub-processes within an L1 process. For example, within Incident Management, you can model L2 processes such as Incident Logging and Incident Resolution.

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Business processes in Enterprise Architecture Workspace

Use business processes to connect operational workflows to other enterprise architecture artifacts:

- Associate business processes with business applications to show which applications support the workflow.
- Associate architectural artifacts with business processes to link design decisions to execution.
- Add business processes to process maps or diagrams to visualize relationships.
- Link business processes to value streams to show how internal workflows support end-to-end value delivery.
- Associate business processes with the business units that own them.

Use business processes to model internal workflows and relate them to supporting applications. Use business capabilities to describe what the organization does. Use value streams to describe end-to-end value delivery across functions.

A business process is not the same as a business process activity. A business process models the overall workflow and its L0-L2 hierarchy. A business process activity is a separate, standalone entity that represents a discrete unit of work performed by a business actor. For more information, see Exploring business process activities.

Note: Before Australia Patch 5, a business process could be associated with only one business unit, using a **Business Unit** field on the form. This field has been removed from the default form view and replaced with the **Related business units** related list, which lets you associate a business process with multiple business units. The Business Unit field still exists on the table — administrators can add it back to the form from Form Layout if needed. Associations that existed before the upgrade are not automatically migrated; you must explicitly add the business unit to the Related business units related list.

Related topics

View all business processes

Add or edit a business process

Manage architectural artifacts of a business process

Associate a business process with a value stream stage

Add a business unit to a business process

Remove a business unit from a business process

Exploring business process activities

Business process activities represent discrete units of work within workflows. Knowing how they differ from business processes helps you model organizational tasks accurately.

A business process activity represents a specific task, step, or action performed within your organization, such as a manual task, an approval step, or a system-triggered action.

Business processes vs. business process activities

Business processes and business process activities serve different purposes:

- Business process — Models the overall workflow your organization uses to achieve a business outcome. Business processes are organized into a hierarchy of levels (L0, L1, L2, and deeper) using CI relationships. Each level represents a broader or narrower scope of the same workflow.

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- Business process activity — A standalone record that represents a discrete unit of work, classified by an activity type (for example, **Manual Task**). Unlike business process levels, a business process activity is not part of the L0-L2 hierarchy — instead, it is associated with the business actors who perform it.

You can:

- Create and edit business process activities
- Classify activities by type
- Assign owners and managing groups
- Link activities to business actors who perform them

When you model a business process activity in a diagram, the default relationship between a business process activity and a business actor is Performed by :: Performs.

Related topics

Manage business process activities

Exploring demands

You can use a demand as a step to identify cost-saving opportunities on applications or capabilities and to meet the target.

The strategy that you associate with the demand action decides the strategy for the application.

Related topics

View all demands

Add or edit a demand

Exploring business actors

A business actor represents the entity that performs work in your organization, such as a business unit, role, or department.

You need business actors to specify who performs business process activities. Business actors can be associated with departments, groups, locations, and the business roles they fulfill.

Using Enterprise Architecture Workspace, you can perform the following:

- Create and edit business actors
- Associate a department, group, and location with a business actor
- Associate a business actor with the business roles it fulfills
- Associate a business actor with the business process activities it performs

When you model a business actor in a diagram, the default relationship between a business actor and a business role is Assigned to :: Fulfilled by. The default relationship between a business actor and a business process activity is Performs :: Performed by.

Related topics

Manage business actors

Add a business process activity to a business actor

Remove a business process activity from a business actor

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Exploring business roles

A business role defines the responsibilities, rights, and duties that a business actor holds when performing specific business behavior.

A business role represents a set of responsibilities, rather than the person or team that fulfills them. A business role encompasses the rights and duties associated with performing specific business behavior, independently of who currently holds the role.

Business roles can have a parent role, letting you build a role hierarchy that reflects your organization's reporting structure. For example, a Credit Officer role can have Onboarding Specialist as its parent role.

Using the Enterprise Architecture Workspace, you can perform the following:

- Create and edit business roles
- Build a role hierarchy using parent roles
- Associate a department, group, and required skills with a business role
- Associate business actors with a business role to identify who fulfills it

When you model a business role in a diagram, the default relationship between a business actor and a business role is **Assigned to :: Fulfilled by**.

Related topics

Manage business roles

Exploring drivers

A driver is an external or internal condition that motivates your organization to define goals and implement changes in Enterprise Architecture Workspace.

A driver can originate from a competitor, customer, government agency, or from within your organization. Drivers explain why your organization sets particular goals or makes particular changes.

A driver has a source of either **External** or **Internal**. The available driver types depend on the source you select. External drivers can be typed as Competitor, Customer, Environment, Partner, Government, Legal, Economic, Social, or Technological. Internal drivers can be typed as Assumption, Corporate, Infrastructure, Resource, or Other.

You can perform the following tasks:

- Create and edit drivers
- Rate a driver's urgency
- Associate a driver with the stakeholders it influences and the goals it influences

When you model a driver in a diagram, the default relationship between a driver and a stakeholder, and between a driver and a goal, is **Influences :: Influenced by**.

Related topics

Manage drivers

Exploring stakeholders

Stakeholders are individuals or teams with an interest in your enterprise architecture outcomes. Use stakeholders to identify who influences and is affected by your architectural decisions.

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Stakeholders can be internal or external to your organization. They influence architectural decisions and are affected by the outcomes of your enterprise architecture initiatives.

You can:

- Create and edit stakeholders.
- Associate stakeholders with departments and groups.
- Rate stakeholder influence and interest levels.
- Associate stakeholders with related drivers, goals, value streams, and business processes.

When you model a stakeholder in a diagram, the following default relationships are available:

- With drivers: **Influenced by** :: **Influences**
- With goals: **Has goal** :: **Goal of**
- With value streams or business processes: **Interested in** :: **Of interest to**

Related topics

Manage stakeholders

Exploring the application portfolio

The Application Portfolio section within the Portfolio page of the Enterprise Architecture Workspace helps you to manage business applications, application services, digital integrations, and digital interfaces.

Related topics

Exploring total cost of ownership (TCO) in Enterprise Architecture Workspace

Working with an application portfolio

Exploring business applications

A business application is software used by business users to perform a business function. Classify the applications to maintain an inventory and consolidate the business applications. Analyze, assess, and evaluate the applications across various dimensions and determine the action that you can take for each application.

You can record the details of a business application manually or import the list of applications from a spreadsheet or a third-party tool. To import data, define a data source and transform map, and run or schedule an import.

Assessment of Business applications

In Enterprise Architecture, add any business application that you want to assess and track for costs, usage, business value, functional fitment, and risks.

Modeling platform applications and platforms

Use the Business Application form to create a record and capture the details of a platform application just as you create a record for a business application. Use the same form to create individual records of all business applications that run on the platform. This structure gives you a hierarchy of business applications associated with the platform host. The **Architecture type** field values help you to distinguish between the platform host and platform application data.

The architecture type values help in the following business cases:

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- Assess the performance of the platform as a whole as well as assess the performance of individual applications running on it.
- Platform may be owned by a business owner who may not be the owner of the applications running on that platform. In such a scenario, the platform owner can assess the performance of the platform independent of the application owners, who assess the applications associated with the platform.

For example, you can create a business application record for the ServiceNow® platform. Then, create individual business application records such as Enterprise Architecture, Financial Management, and Project Portfolio Management and associate these applications to the ServiceNow® platform. The **Architecture type** field distinguishes between records. Use platform application for applications running on a host and platform host for platforms hosting applications.

Related topics

View all business applications

Add or edit a business application

View business capabilities for a business application

Add a business capability to a business application

Remove business capabilities from a business application

Create a Lucidchart diagram for a business application

Open business application form in Core UI from EA Workspace

View a unified map for a business application

View roadmap of a business application

Manage information objects in EA Workspace

View architectural artifacts for a business application

Associate an architectural artifact with a business app

Add an architectural artifact to a business application

Remove architectural artifacts from a business application

AI Control Tower integration with Enterprise Architecture

View and manage the AI systems associated with a business application from the Enterprise Architecture Workspace to understand AI risk and governance status as part of your broader application portfolio.

Key benefits of AI Control Tower integration with Enterprise Architecture

The integration between the AI Control Tower and business applications is built around four core themes:

- Unified AI governance: Connect AI oversight to your technology portfolio as an integrated capability. You can make AI governance decisions with full awareness of the business applications they affect.
- Business context for AI: AI governance without business context is incomplete. AI stewards can see the applications, owners, and business impact tied to every AI system they govern, enabling better-informed decisions on approval, risk classification, and accountability.

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- Portfolio-wide AI visibility: Enterprise architects get AI adoption and governance status surfaced directly in their existing workflows — no context switching required. An enterprise architect responsible for hundreds of business applications can see exactly which ones are using AI, and whether that AI has been approved.

Why AI systems are connected with business applications

Enterprise Architecture manages business applications by tracking their costs, business value, functional fitness, and risk. AI systems embedded in or supporting those applications introduce a new category of risk — one that requires dedicated governance beyond what traditional Enterprise Architecture covers. Without visibility into which AI systems are associated with each business application, an enterprise architect can't form a complete picture of that application's risk profile. This includes conformance and operational dependencies.

At the same time, AI Control Tower governs AI systems through their full lifecycle — from onboarding and risk assessment through build, test, and deployment. However, AI governance is most effective when AI systems are understood in their business context: which applications depend on them, which business processes they support, and what the organizational impact would be if they were changed or decommissioned. That context lives in the Enterprise Architecture Workspace.

The integration between the Enterprise Architecture and AI Control Tower addresses both gaps. Enterprise architects can assess AI risk at the application level. AI stewards can ground governance decisions in business impact. Together, they give your organization a unified view of AI activity that spans both the application portfolio and the AI asset inventory.

The connection between AI systems and business applications enables you to:

- Track total cost of ownership: Track AI systems related budgets at a business application level
- Track ownership and accountability: Track AI system ownership through the business application it serves
- Track AI system impact: Track the business impact the AI system is creating by connecting the AI system's technical outputs to the business functions it supports

Value by persona

Enterprise Architecture - AI Control Tower integration benefits for personas

Persona	Before integration	After integration
Enterprise architect	I manage 500 business applications but have no idea which ones are using AI or whether that AI is approved.	I can see AI adoption across my application landscape and understand governance status from my existing workspace.
AI steward	I govern AI systems but don't understand their business context—who owns the applications using them, how critical they are.	I see exactly which business applications depend on each AI system and who's accountable.

Value for enterprise architects

The **AI systems** tab on a business application record lets enterprise architects answer questions that were previously difficult to address from Enterprise Architecture alone:

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- Which AI systems are running inside or alongside this business application?
- Are any of those AI systems still not reviewed and pending AI Steward approval?
- What is the governance and lifecycle status of each AI system this application depends on?
- If this application is being rationalized or retired, which AI systems will be affected?
- What is the AI adoption picture across my entire application portfolio, and where are the governance gaps?

Because the **AI systems** tab surfaces data directly from AI Control Tower, enterprise architects don't have to switch workspaces or contact the AI governance team to get these answers. The AI system's lifecycle phase, state, lifecycle status, and risk classification are all visible from the business application record.

Value for AI stewards and AI asset owners

AI Control Tower tracks AI systems through four lifecycle stages: onboard, assess, build and test, and deploy. At each stage, governance decisions — such as risk classification, conformance review, and approval — benefit from knowing the business context of the AI system being evaluated.

Without this integration, an AI steward reviewing a submitted AI system sees only its technical attributes. They have no visibility into which business applications depend on the system, who owns those applications, or how critical those applications are to the organization.

By associating AI systems with business applications, AI Stewards and AI Asset Owners gain visibility into the business scope of each AI system before they begin governance activities. This reduces the risk of approving or escalating an AI system without a context of which business processes and applications it affects.

The business application associations on an AI system record also support audit readiness. During an AI risk assessment or conformance review, you can show which business applications an AI system supports. Demonstrating that those applications are active, non-retired, and within scope is a key part of the evidence trail.

Managed and unmanaged AI systems

AI systems in the **AI systems** tab appear under one of two sections:

Managed

AI systems that an AI Steward has reviewed or that an AI Steward is reviewing. AI Control Tower actively governs and tracks managed systems through their lifecycle.

Unmanaged

AI systems created in AI Control Tower that users have not yet submitted for AI Steward review and have not entered the governance lifecycle.

Both sections are visible on the business application record. Enterprise architects can see the AI systems that have cleared governance review and those still awaiting it. An application with several unmanaged AI systems warrants closer attention during portfolio assessments and rationalization exercises.

The tab displays the following information for each AI system:

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Column	Description
Display name	The name of the AI system.
Provider	The organization or vendor that provides the AI system.
Vendor	The technology vendor associated with the AI system.
Managed by	The role responsible for managing the AI system, such as AI Asset Owner.
Lifecycle phase	The current phase in the AI system lifecycle: New, Assess, Build and test, or Deploy.
State	The current state of the AI system record, such as Development.
Lifecycle status	The review or approval status, such as AI steward review.
Risk classification	The risk level that AI stewards assign to the AI system during governance review.

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How associations are created

Enterprise Architecture supports domain separation at the data level. If your instance uses domain separation, such as a managed service provider hosting multiple client tenants, the available business applications reflect the domain hierarchy. You can select business applications in the global domain and in the domain you're currently operating in. Viewing the association from a parent domain shows the AI systems and business application associations created in that domain and in all of its child domains. A child domain's view shows only its own associations.

An organization has a business application in the global domain and two business applications, one each in the Domain A and Domain B child domains. A user operating in Domain A can associate an AI system with the global business application, the Domain A business application, or both. The user can't select the Domain B business application. A user at the parent domain can see the AI system associations created in both Domain A and Domain B. These associations are rolled up together wherever they involve the shared global business application.

Users associate an AI system with a business application in one of two ways:

- A user submits the **Request an AI Use Case** catalog item in the service portal and selects one or more business applications in the **Business Applications** field. Use this intake path because it creates the AI system record in AI Control Tower and establishes the business application association in a single step.

  Note: The **Business application** field is only displayed on the service catalog page for the AI system use case if the Enterprise Architecture for AICT plugin (`com.sn_ea_aict`) is installed. This plugin installs automatically when you install the AI Control Tower Core plugin at the required version. If your instance does not meet the minimum version, or if the Enterprise Architecture for AICT plugin is not installed, the Business application field does not appear on the form. For version requirements and what to expect if your Enterprise Architecture Workspace, AI Risk and Compliance, and AI Control Tower Core plugins are upgraded out of sync, see Enterprise Architecture for AICT plugin installation and upgrade considerations.

  For information on how to create an AI use case, see Request an AI use case or Create AI system assets.

  For information on the Request an AI use case form fields, see Request an AI use case form.

- A user with the APM user (sn_apm.apm_user) role manually adds an AI system from the **AI systems** tab on a business application record in the Enterprise Architecture Workspace. Use this to associate AI systems that were not submitted through the service portal intake form. For information, see Add an existing AI system to a business application.

Only active business applications are available for association. The system automatically excludes business applications with a status of Retired or a lifecycle stage of End of Life. The associations on an AI system record reflect only applications that are currently in scope for portfolio management.

Removing an AI system association from a business application record does not delete the AI system record from AI Control Tower. The AI system continues through its governance lifecycle independently of its application associations.

If you activated the AI Control Tower and Enterprise Architecture Workspace integration on a Enterprise Architecture Workspace version earlier than 10.1.3, upgrade to version 10.1.3 or later. Then run the Migrate BA Product Model Map from EA Workspace job. This job migrates existing AI system-to-business application associations to the Enterprise Architecture for AICT plugin's

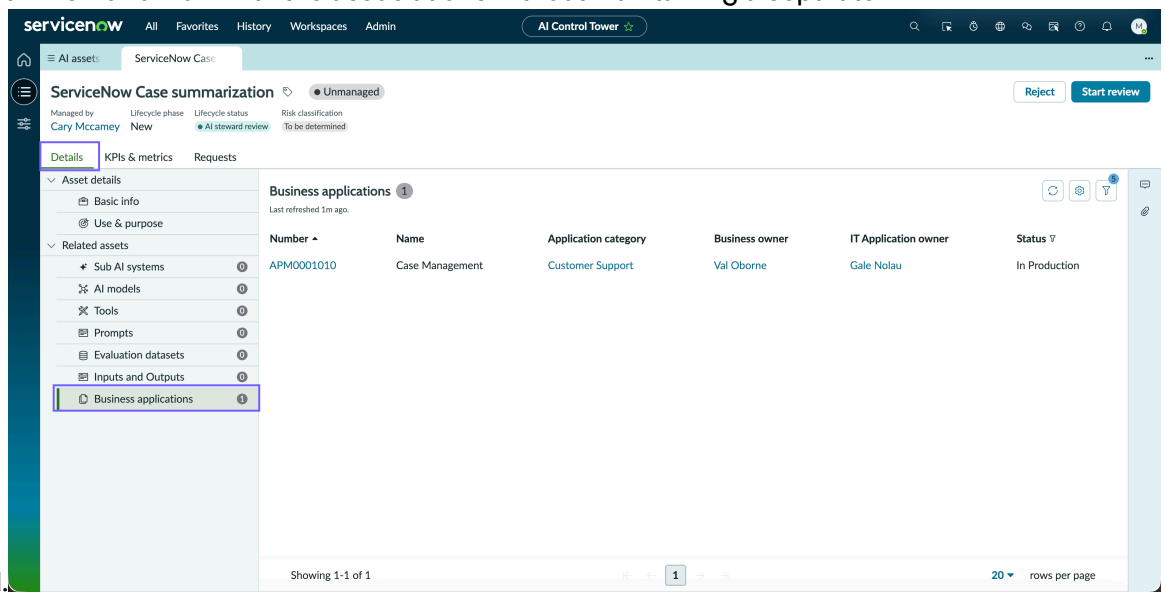
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data model. The job does not run automatically. For steps, see Run the Migrate BA Product Model Map job.

Viewing associated business application in AI Control Tower

The association between AI systems and business applications is bidirectional. To view linked business applications in AI Control Tower, navigate to **Workspaces** > **AI Control Tower** > **AI Assets** > **AI systems** > **Select an AI system** > **Details** > **Business applications**. This view is read-only in AI Control Tower; to add or remove associations, use the **Related assets** > **Business applications** > **AI systems** tab on the business application record in the Enterprise Architecture Workspace.

Enterprise architects work primarily in the Enterprise Architecture Workspace, while AI stewards work primarily in AI Control Tower. This bidirectionality means each team sees the same associations from their own workspace. Each team can view and work with the associations without maintaining a separate record.



Required roles

To view the **AI systems** tab on a business application record, you must have the APM User role (sn_apm.apm_user) or higher. Users with the AI Steward (sn_aig.ai_steward) or AI Asset Owner (sn_aig.ai_asset_owner) role can add or remove AI system associations.

Related topics

- AI Control Tower Home
- #unique_61
- Remove an AI system from a business application
- View AI system details from a business application
- Exploring the AI Portfolio tab on the Enterprise Architecture Workspace dashboard
- Run the Migrate BA Product Model Map job
- Enterprise Architecture for AICT plugin installation and upgrade considerations
- Associate a business application with an AI system

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Exploring application services

An application service is a set of interconnected applications and hosts which are configured to offer a service to the organization. An application service is a logical grouping of application functions.

Application services enable you to structure your application landscape, specify its function, and associate it with the relevant applications. This helps you to remove redundant applications and optimize your application landscape.

Application services support business capabilities by offering specific application capabilities.

Related topics

- View all application services
- Add or edit an application service in the Enterprise Architecture Workspace

Exploring digital interfaces in Enterprise Architecture Workspace

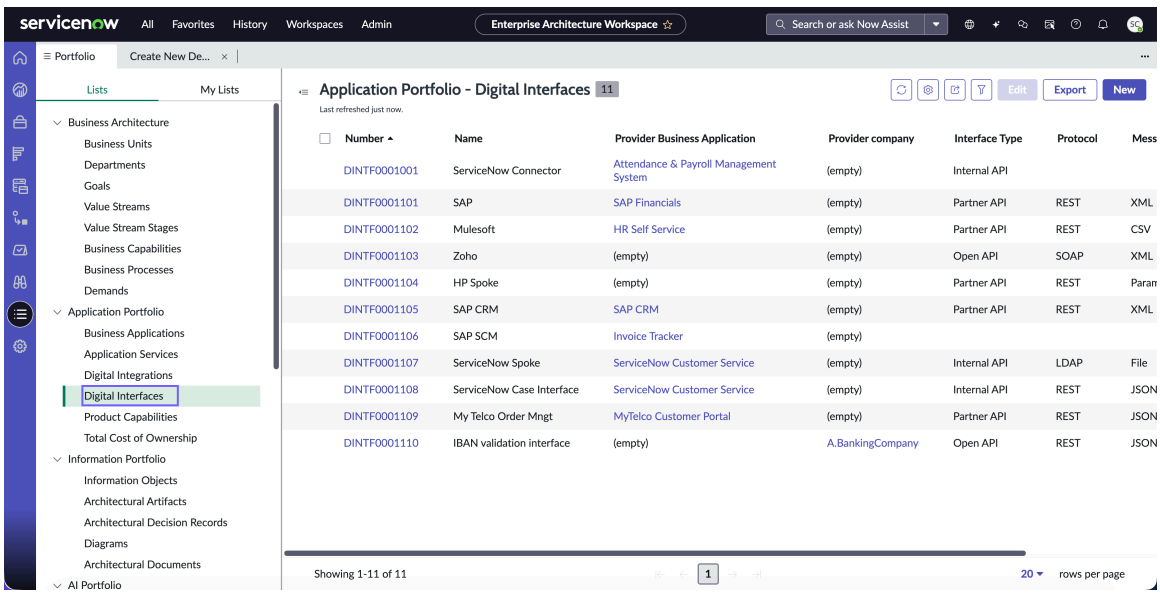
Manage all your digital interfaces from the Portfolio page of the Enterprise Architecture Workspace.

Digital interfaces represent logical contracts that expose functionality or data from business applications to other applications. A digital interface is modeled as a design-time object to describe how other services or business applications can interact with the provider.

A single business application can expose multiple digital interfaces. Each interface represents a distinct API, service endpoint, or event stream and can define which information objects are provided or updated through that interaction.

The Digital Interfaces page displays a list of existing digital interfaces and their related information. You can access the Digital Interfaces page by navigating to **Workspaces** > **Enterprise Architecture Workspace** > **Portfolio** > **Application Portfolio** > **Digital Interfaces**.

Digital Interfaces



Related topics

- View all digital interfaces
- Add or edit a digital interface in the EA Workspace

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Connect a digital interface with the CMDB API in the EA Workspace

Manage architectural artifacts of a digital interface

Relate an SDLC component to a digital interface

Relate an information object to a digital interface

Relate credentials to a digital interface

Exploring digital integrations in Enterprise Architecture Workspace

Manage all your digital integrations in the Enterprise Architecture Workspace.

The digital integration functionality in Enterprise Architecture Workspace helps you to understand the business purposes for your applications, for their connection, and for their interaction. Install the Digital Integration Management (sn_apm_di) plugin from the ServiceNow Store.

You can do the following:

- Proactively identify integration issues in one location.
- Manage the information flows across your organization.
- Govern interface usage for internal and external APIs.

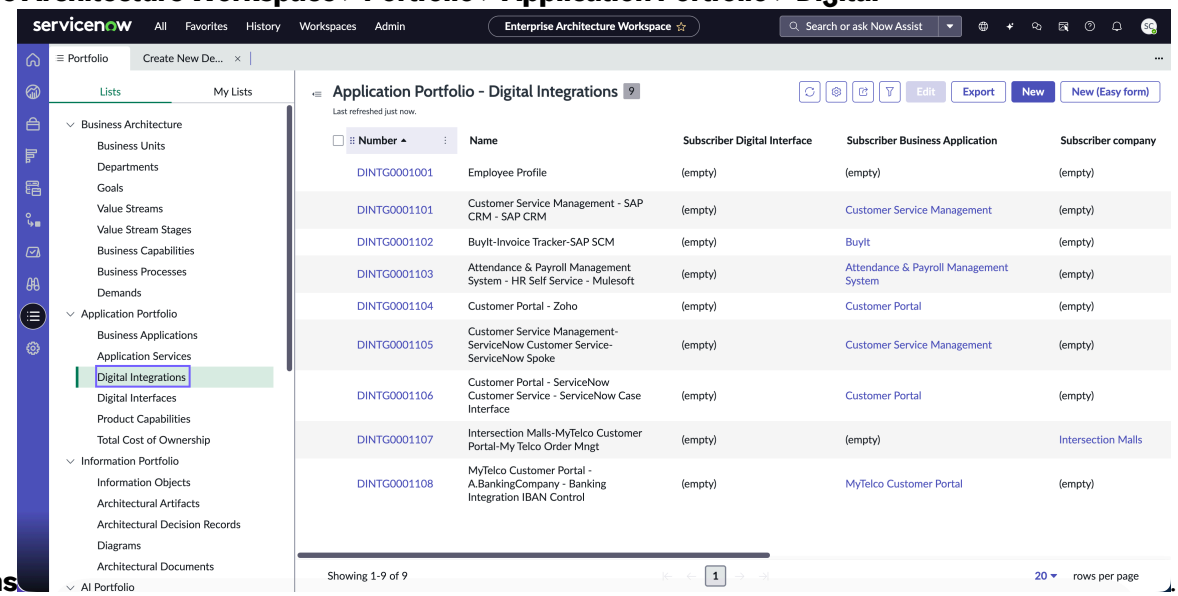
The digital integration represents the integration between two business applications. In a typical scenario, there's a consuming business application, a provider business application, and an interface provided by the provider business application. The digital integration contains integration metadata, including name, version, type, data flow direction, middleware used, and owners.

An easy form for digital integration enables the creation of a digital integration from a single page. If the digital interface doesn't exist, you can create a new one.The digital integrations are saved in the Digital Integration [sn_apm_di_digital_integration] table. After you create a digital integration, a CI relationship link is created between the two business applications with the interface type. This link enables you to access the integration as part of the node map for any business application. A catalog entry is provided to request approval for a digital integration. After the request is approved, the integration gets created.

The Digital Integrations page displays a list of existing digital integrations and their related information. You can access the Digital Integrations page by navigating to **Workspaces**

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> **Enterprise Architecture Workspace > Portfolio > Application Portfolio > Digital Integrations**



Integrations

Related topics

- Digital integration management data model
- View all digital integrations
- Add or edit a digital integration in the EA Workspace
- Manage architectural artifacts of a digital integration in EA Workspace
- Associate an information object to a digital integration

Exploring the information portfolio

Use the information portfolio to capture information from the assets of your organization as information objects. You can categorize the information assets and determine its business application use. You can also connect the different layers where data exists and map the layers. Mapping helps to retrieve the information and track the information flow.

Information portfolio data model

The basic data model of information portfolio is in the introduction of two tables, which are Information Object and Data Domain.

- Information object is a configuration item that displays information in an organized form. The purpose of the information object is to logically describe the type of data (or the information) that is interchanged between the application and the database. The database being the one that serves the application with data.
- Data domain is to classify or categorize the information objects.

Enterprise Architecture integrates with information portfolio by relating a business application with the database. The database provides the information to the application using an intermediary CMDB CI class called information object [cmdb_ci_information_object] table.

The business application is related with the information object by establishing Uses::Used by CMDB CI relationship. The information object, in turn, is linked to the database catalog and instances by establishing Depends on::Used by CMDB CI relationship.

Enterprise Architecture integrates with ServiceNow Discovery that finds database applications, database instances, and database catalog. The database catalog lists all the catalog objects, or databases, discovered for an instance of a database.

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Plugin activation procedure

CMDB plugin has the Information Object (cmdb_ci_information_object) CI. When the Enterprise Architecture plugin is activated, the data domain field gets added to the cmdb_ci_information_object table. The data domain field references the Data Domain table, which is included in the Enterprise Architecture plugin.

Related topics

Working with information portfolio

Exploring data domains

A data domain is a collection of information objects. A data domain categorizes information objects.

A data domain is a logical grouping of related information objects that represent a specific area of a business- such as Finance or HR. Data domains enable you to analyze data in a way that aligns with business capabilities and operational needs.

Related topics

View all data domains

Add or edit a data domain from the Portfolio page

Exploring information objects

Exploring information objects

An information object captures the logical data for a business application. It also describes the type of data that is interchanged between the application and the database.

By analyzing information objects, you can understand how data is structured and used across your enterprise.

Related topics

View all information objects

Add or edit an information object

Exploring data domains

Exploring architectural artifacts

Architectural artifacts are created to describe a system, solution, or state of an enterprise. The goal of architectural artifacts in Enterprise Architecture is to enable enterprise architects to create and manage artifacts in their organization.

Sometimes you may rely on external sources to keep and maintain many of your enterprise architecture elements such as diagrams, reports, and other visualizations. The architectural artifacts feature makes it easy to associate these artifacts to the ServiceNow® objects such as business applications or business capabilities.

As an enterprise architect, you can use architectural artifacts to perform the following tasks:

- Review and approve architectural artifacts
- Track artifacts versions
- Relate architectural artifacts to categories that are configured to match the needs of the organization
- Associate your architectural artifacts to your organization's business capabilities, business applications, digital integrations, or digital interfaces.

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The architectural artifacts feature extends the functionality of the ServiceNow® Document Management plugin (com.snc.platform_document_management) and can create a relationship with ServiceNow® objects: business applications, business capabilities, digital integrations, or digital interfaces.

Related topics

- View all architectural artifacts
- Create or edit an architectural artifact from Portfolio page
- Add a related entity to an architectural artifact
- Share an architectural artifact with users or groups
- Manage access to architectural artifacts
- Request approval for an architectural artifact
- Download an architectural artifact version
- Delete an architectural artifact version

Exploring architectural decision records (ADR)

Use the Architectural Decision Records (ADR) to explain your infrastructure. ADR is a type of artifact that helps you to understand the background of a specific architectural decision.

ADR Overview

An ADR can have multiple doc pages associated with it to help you organize key architectural artifact details. Predefined ServiceNow Docs component (sn_docs) templates are available. You can create ADR pages using one of these templates or start with a empty page.

Note: The ADR feature in Enterprise Architecture Workspace uses the ServiceNow Docs component (sn_docs) to create pages in the Artifacts section. Docs component v6.0.0 is automatically installed with Enterprise Architecture Workspace v3.4.0.

If you're using an older version of Enterprise Architecture Workspace with Docs component v6.0.0, upgrade the workspace to v3.4.0 to fully use the ADR functionality. For more information, see KB2017926.

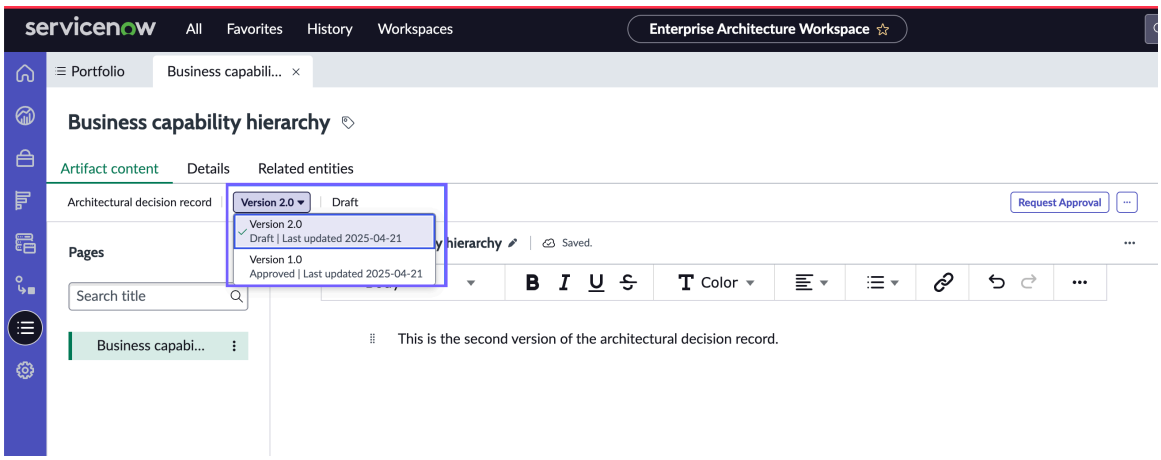
Features of ADR

Some features of ADR are:

- Auto-save content
- Create documents using pre-defined templates
- Use rich text paragraph formatting, which includes headings, lists, alignment, and others.
- Tag users inline or insert record details using the / command.
- Insert images by uploading files or using web URLs
- View version specific ADR content using the version drop-down. The versions drop-down displays the following information:
  - Version number
  - ADR status
  - Date of last update

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On selecting a particular version, you're directed to the ADR artifact content page for that version.



Summarize ADR content using ServiceNow Otto for Enterprise Architecture (EA)

Use Now Assist capabilities to elaborate, shorten, and summarize selected content in ADRs, or to get a summary of the whole ADR. For more information, see Using ServiceNow Otto for Enterprise Architecture (EA)

Related topics

- Add or edit an architectural decision record (ADR)
- Create and manage pages and subpages for ADRs
- Tag users or records in Architectural Decision Records
- Reference additional records in decision records
- Add an architectural decision record version
- Request approval for an ADR version
- Add a related entity to an architectural artifact
- Create related entities form

Exploring the AI Portfolio tab on the Enterprise Architecture Workspace dashboard

The **AI Portfolio** tab on the Enterprise Architecture Workspace dashboard provides visualization widgets that show how business applications and AI systems in your organization are associated.

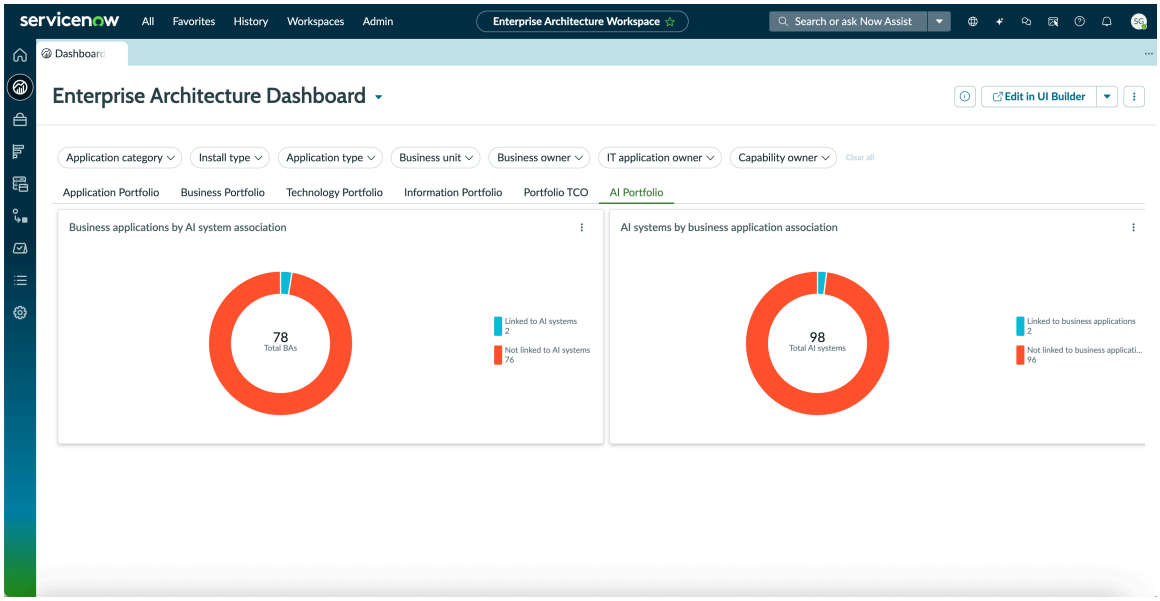
When the AI Control Tower (AICT) workspace is installed, the **AI Portfolio** tab appears on the Enterprise Architecture Workspace dashboard alongside the existing portfolio tabs. Use this tab to monitor AI adoption and understand how business applications and AI systems are connected across your enterprise.

Note: The **AI Portfolio** tab is visible only when the AI Control Tower workspace is installed on your instance.

AI Portfolio widgets

The **AI Portfolio** tab contains two widgets. Both widgets source their data from approved linkage records in the AI System–Business Application relationship table.

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Business Applications by AI System Association

Displays the total count of active business applications in the center of the chart. The chart is segmented into two groups:

- **Associated: Linked to AI systems** — Business applications that have at least one approved linkage with an AI system.
- **Not associated: Not linked to AI systems** — Business applications with no approved AI system association.

AI Systems by Business Application Association

Displays the total count of AI systems in the center of the chart. The chart is segmented into two groups:

- **Associated: Linked to business applications** — AI systems that have at least one approved linkage with a business application.
- **Not associated: Not linked to business applications** — AI systems with no approved business application association.

If no AI systems are associated with any business applications, the widgets display the default empty state.

Related topics

- AI Control Tower integration with Enterprise Architecture
- Explore the Enterprise Architecture Workspace dashboard
- Add an existing AI system to a business application
- AI Control Tower Home

Manage your entities

The My entities section within the Portfolio page of the Enterprise Architecture Workspace helps you to manage all your own entities.

Related topics

- Working with your entities

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Exploring total cost of ownership (TCO) in Enterprise Architecture Workspace

The Application Total Cost of Ownership (TCO) plugin helps Enterprise Architects evaluate the cost of business applications. Use application costs to prioritize the application portfolio and align with the organization's business strategy.

Application TCO indicators

The following indicators are added for Application TCO.

Indicator name	Description
Portfolio TCO	This indicator collects the total cost for a business application for a fiscal period.

You can view the assessment score of the Portfolio TCO indicator in the Application Rationalization List view.

Tables installed with Application TCO

The following tables are installed with the Application TCO plugin:

Table	Description
Total Cost of Ownership - sn_apm_tco	Stores total cost of ownership details for all the business applications. You can see the details such as Cost type, Expense type, Cost, Fiscal period, Billing date, Vendor, Source, and Source cost type.
TCO Cost Type - sn_apm_tco_cost_type	Stores the TCO cost types within Enterprise Architecture Workspace for analysis and reporting.
TCO Source - sn_apm_tco_source	Stores the name of the TCO source.
TCO Source Cost Type - sn_apm_tco_source_cost_type	Stores the cost types used in the source.

Business rules added for Application TCO

The following business rules are added for Application TCO:

Business rule	Table	Description
Check for duplicate cost type	TCO cost type [sn_apm_tco_cost_type]	Checks for the duplicate name and expense type entry in the TCO cost type table.
Check for duplicate source name	TCO source [sn_apm_tco_source]	Checks for the duplicate source name entry in the TCO source table.
Check for duplicate source cost type	TCO source cost type [sn_apm_tco_source_cost_type]	Checks for the duplicate source and source cost type entry in the TCO source cost type table.

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TCO dashboards

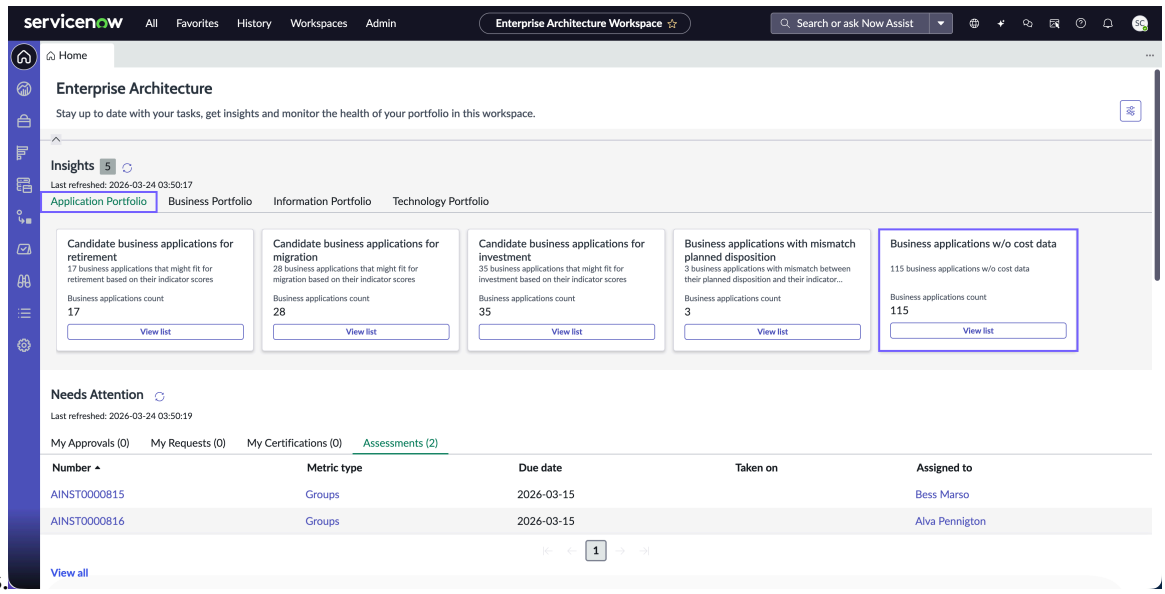
The **Portfolio TCO** tab in the **Dashboards** page displays the following dashboards for Application TCO:

- Business Application TCO for current quarter and previous quarter
- Business Application TCO trend for year
- Business Application TCO by application category for current quarter and previous quarter.
- Business Application TCO by application planned disposition for current quarter

For more details, see Explore the Enterprise Architecture Workspace dashboard.

Application TCO insights

The Insights section in the Enterprise Architecture Workspace home page displays insights for your business applications.



Related topics

Manage application total cost of ownership (TCO) in Enterprise Architecture Workspace

Install the Application Total Cost of Ownership (TCO) plugin

Manage application total cost of ownership (TCO) in Enterprise Architecture Workspace

You can configure the application TCO source and cost type in the Enterprise Architecture Workspace.

Application TCO source

The application TCO source helps you to categorize and analyze the costs associated with business applications, over a fiscal period, enabling you to optimise your application portfolio.

Application TCO cost type

The application TCO cost type refers to the categorization of business application costs. There are mainly two types of costs:

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- Capital expenditure (Capex): The expenditure incurred by you to onboard, upgrade, or maintain a business application.
- Operating expenditure (Opex): The expenditure incurred by you to use a business application on a day-to-day basis.

The application TCO cost type helps you to evaluate and manage the capital and operating expenditures associated with your business application.

Related topics

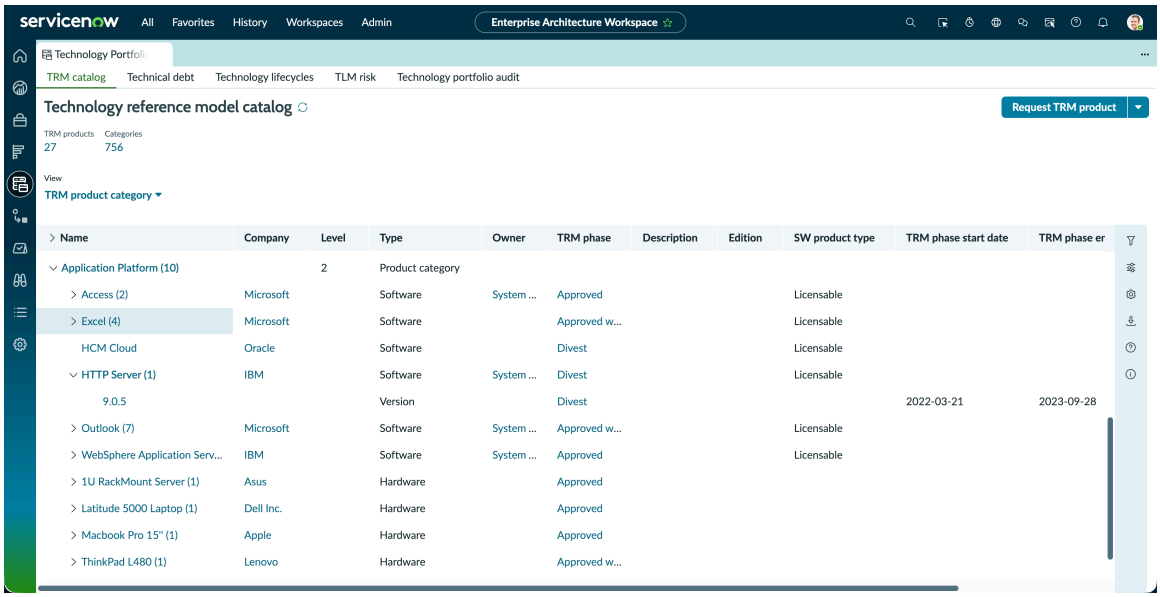
Exploring total cost of ownership (TCO) in Enterprise Architecture Workspace

Install the Application Total Cost of Ownership (TCO) plugin

Add or edit a total cost of ownership record

Exploring Technology Portfolio view

Use the Technology Portfolio in the Enterprise Architecture Workspace for Technology Lifecycle Management (TLM) and to manage your Technology Reference Model (TRM) catalog.



Technology Lifecycle Management (TLM)

You can use Technology Lifecycle Management to track technology life-cycle risks and technology life-cycle exceptions.

For more information on Technology Lifecycle Management, see Exploring Technology Lifecycle Management (TLM) in Enterprise Architecture Workspace.

Technology Reference Model (TRM)

You can use the Technology Reference Model feature to define the standards for your software and hardware products and manage unapproved products in your organization.

For more information on Technology Reference Model, see Technology Reference Model in Enterprise Architecture Workspace.

You can see the following tabs on the Technology Portfolio page:

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- **TRM catalog**
- **Technical Debt**
- **Technology lifecycles**
- ***TLM*risk**
- **Technology portfolio audit**

Note: You can zoom on this page to 200% or 400% through your browser settings without the loss of content or functionality. Page layouts are transformed into a vertical, stacked view automatically.

Technology Reference Model in Enterprise Architecture Workspace

The Technology Reference Model (TRM) feature in Enterprise Architecture Workspace helps define the standards for your software and hardware products and manage unapproved products in your organization.

Overview and benefits of a TRM

In your business enterprise, using unapproved software can create a risk to the organization. The risks can include the following:

- Security risks: The software might be exposed to security issues.
- Delivery risks: There might not be sufficient knowledge on how to support the software.
- Legal risks: A business application might use the software in illegal ways.

You must define the standards for the software that is to be used and the software versions that are permitted for use in your organization. Use this module to identify non-permitted software in use across the organization and the business applications that use it.

You can use the TRM module in the Enterprise Architecture Workspace to perform the following:

- View a list of all available TRM products. You can also view the list of TRM products grouped by product category
- Request a TRM product
- Request a TRM product lifecycle
- Create a TRM product
- Create a TRM product lifecycle
- Approve or reject TRM product and product lifecycle requests

When you request or create a TRM product, you can optionally add one or more lifecycle records as part of the same action. This eliminates the need to submit a separate lifecycle request afterward. Similarly, approving or rejecting a standalone TRM product lifecycle request applies to all child lifecycle records included in that request.

Using the TRM module, you can manage the standards of the technology and set the right guardrail for technology usage. Setting the standards can improve the technical debt, security posture and save costs for the organization.

You can also assign an owner to a TRM category, to facilitate clear accountability and improved governance standards. The owner is responsible for maintaining consistent technology compliance standards for that TRM category.

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TRM product lifecycle

Each product in the TRM library is associated with a set of lifecycle phases with a start and end date. The lifecycle phases could be approved, unapproved, approved with constraints, divest, and evaluation.

The TLM home page fetches all the business applications that are used in your organization. It helps to review the status of the software that is being used. You can understand if any business application is using the software that is not part of the TRM or a software version that is not approved for production. For more information, see TRM lifecycle timelines on Gantt chart.

The TRM module uses a similar module to TLM to search in the TRM library. You can view the software that is part of the TRM library, and initiate a request to add the software or software version to the TRM library.

You can also use the TRM with the Software Asset Management (SAM) plugin. This plugin helps you to fetch or select the products and versions for the TRM library. You can also define your own software products when the Software Asset Management integration module isn't available for your instance.

You can add lifecycle records to a TRM product as part of a product request or a standalone TRM product lifecycle request. The following limits apply to the number of lifecycle groups and phases you can include:

Note:

- For software products: You can add up to 5 version and edition combinations, with a maximum of 10 phases per combination.
- For hardware products: You can add up to 5 hardware models, with a maximum of 10 phases per hardware model.
- You can zoom on this page to 200% or 400% through your browser settings without the loss of content or functionality. Page layouts are transformed into a vertical, stacked view automatically.

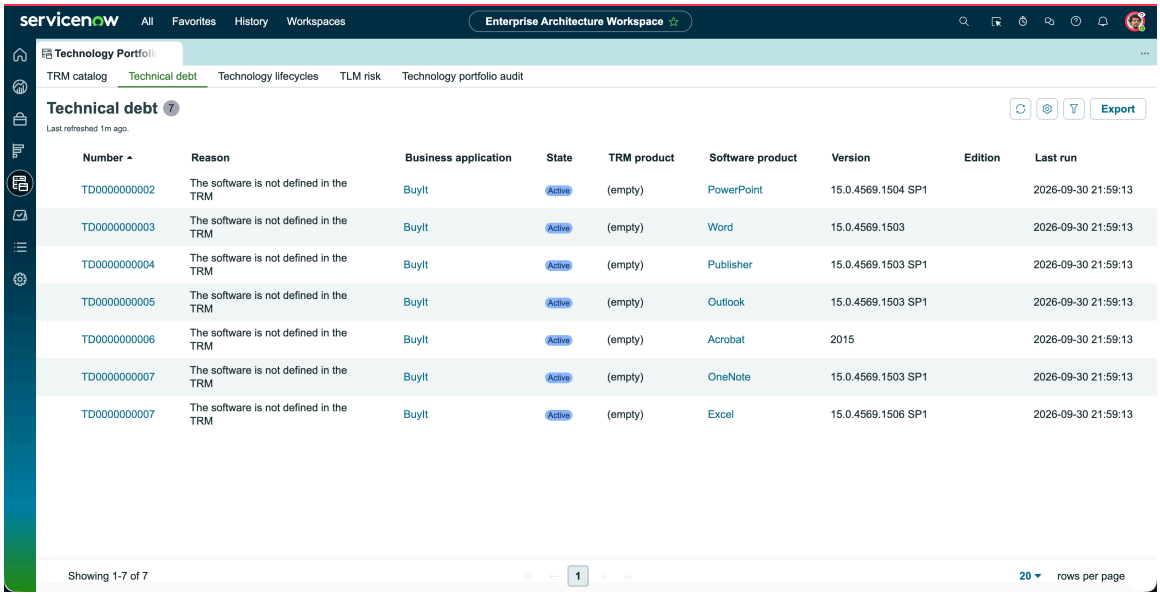
Related topics

- Approve or reject TRM requests
- Working with Technology Reference Model (TRM) in EA Workspace
- View TPM and TRM lifecycle timelines on the Gantt chart
- Gantt view of TLM and TRM lifecycle timelines
- TRM lifecycle timelines on Gantt chart
- Configure TRM phases
- Configure TRM categories
- TRM technical debt states and transitions

TRM technical debt

Manage the TRM technical debts that are created for the products that aren’t approved for the usage.

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A scheduled job *Populate TRM technical debts in the EA Workspace* runs and creates an entry in the TRM Technical Debt [sn_apm_trm_standards_technical_debt] table for Enterprise Architecture Workspace. The table shows a reference to the software in any business application that is not aligned with the TRM software phases. The table shows a reference to the software in any business application that either isn't defined in TRM or has TRM product lifecycles that restrict the usage of the software. To know how the technical debts are calculated, see Technical debt calculation.

Note: The *Populate TRM technical debts in the EA Workspace* scheduled job is available only when the Software Asset Management (SAM) Foundation or Software Asset Management (SAM) Professional plugin is installed.

Technical debt records persist across every run of the scheduled job instead of being deleted and re-created. Each record moves between Active, Resolved, and Archived states based on what the job finds on each run. For details on these states and how records transition between them, see TRM technical debt states and transitions. You can also configure whether the host (server, docker container, or serverless hardware) is part of a record's identity and which reasons the job uses to create technical debt; see Technical debt settings.

Note:

Technical debt persistence, states, and configuration require Enterprise Architecture Workspace version 10.0.0 or later and TPM plugin (sn_apm_tpm) version 1.12.0 or later.

Related topics

- Technical debt calculation
- View Technology Reference Model technical debts
- Update TRM technical debt data using scheduled job
- TRM technical debt states and transitions
- Technical debt settings
- Governing TRM product fields

Technical debt calculation

Technical debt records identify products used in business applications that aren't approved in the TRM or that use unapproved versions. View technical debt records to understand conformance gaps and plan remediation.

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Prerequisites

To view technical debt records, you need the Technology Lifecycle Management (sn_apm_tpm) Store application and the SAM Foundation (com.snc.sams) plugin.

Configurable conditions

You can select which conditions the scheduled job uses to create technical debt records. At least one condition must remain selected. For configuration steps, see Configure technical debt settings.

Technical debt levels

The system creates technical debt records at two levels when specific conditions are met. Level 2 checks occur only when the *sn_apm_trm.is_product_life_cycle_tech_debt_enabled* property is set to `true`.

Level 1 conditions

The system creates a Level 1 technical debt record when either of the following conditions is true:

- A product is associated with a business application but is not part of the TRM product list.
- A product is associated with a business application and is part of the TRM product list, but the Production phase is not approved.

Level 2 conditions

The system creates a Level 2 technical debt record when either of the following conditions is true:

- A product is associated with a business application, is part of the TRM product list, has an approved Production phase, but has no associated TRM product lifecycles.
- A product meets the criteria in the following cases.

Case 1: Full version is not empty

When the full version field in the Software Discovery Model [cmdb_sam_sw_discovery_model] table is not empty, the system creates a technical debt record. This occurs if no TRM product lifecycle meets all of the following criteria:

- The TRM phase is approved for production.
- The TRM product phase is approved for production.
- The version matches the full version or wildcard pattern in the Software Discovery Model [cmdb_sam_sw_discovery_model] table.
- The current date falls between the phase start date and phase end date.

Case 2: Full version is empty

When the full version field in the Software Discovery Model [cmdb_sam_sw_discovery_model] table is empty, the system creates a technical debt record. This occurs if no TRM product lifecycle meets all of the following criteria:

- The TRM phase is approved for production.
- The TRM product phase is approved for production.

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- The version matches (exact or wildcard) the version in the Software Discovery Model [cmdb_sam_sw_discovery_model] table.
- The edition matches the edition in the Software Discovery Model [cmdb_sam_sw_discovery_model] table.
- The current date falls between the phase start date and phase end date.

Edition-specific technical debt

A Level 2 technical debt record can be created from a TRM product lifecycle that is defined by both version and edition. The technical debt record captures the edition along with the version. The edition is part of the record identity. A debt for version X, edition A is a separate record from a debt for version X, edition B.

Related topics

Technical debt settings

TRM technical debt states and transitions

Governing TRM product fields

Work with TRM lifecycle with wildcard

Use Technology Reference Model (TRM) lifecycles with wildcards to update multiple software product lifecycles simultaneously without specifying exact minor version details.

A TRM lifecycle with a wildcard is a TRM software product that has lifecycle version that ends with a '*'. The '*' means that exact specific version details aren't provided.

Note: To define a version for a specific TRM product, see Create TRM product lifecycles in Enterprise Architecture Workspace.

Use of TRM lifecycle with wildcard

The TRM lifecycle with wildcard helps you to automatically identify, categorize, and update TRM software products.

You can also create technical debts in bulk for multiple unapproved TRM software product versions, simultaneously.

Suppose you use Microsoft PowerPoint and have multiple versions like 1.1, 1.2, 1.3 installed for your organization. You create a TRM wildcard with the version ending 1.*. Now, you update some details of the TRM lifecycle with wildcard. When the *Populate TRM technical debts in the EA Workspace* job runs for the TRM wildcard, the updated data from the TRM lifecycle with wildcard is passed on to versions 1.1, 1.2, 1.3.

Create a TRM lifecycle with wildcard

A TRM lifecycle with wildcard is created in a similar process as to how you would request a TRM product lifecycle. For information on how to add a TRM product lifecycle, see Create TRM product lifecycles in Enterprise Architecture Workspace.

The only difference is, the TRM wildcard version ends with a '*'.

You must be a part of the enterprise architects group to be able to create a TRM wildcard.

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Limitations of TRM lifecycle with wildcard

A TRM wildcard can’t create technical debts when the full version of a particular TRM software product exists.

Related topics

- TRM technical debt
- View Technology Reference Model technical debts
- Technical debt calculation
- Update TRM technical debt data using scheduled job
- Create TRM product lifecycles in Enterprise Architecture Workspace

Exploring Technology Lifecycle Management (TLM) in Enterprise Architecture Workspace

Technology Lifecycle Management helps Enterprise Architects to track technology life-cycle risks and technology life-cycle exceptions. Enterprise Architects can evaluate all their business applications and application services by accessing the discovered technologies and auditing information in the Enterprise Architecture Workspace.

Important:

Technology Lifecycle Management (TLM) was previously known as Technology Portfolio Management (TPM). TPM and TLM refer to the same feature. Table names and scheduled job names continue to use TPM and haven't been renamed.

Whether your instance displays TPM or TLM also depends on your application versions. TLM labels appear only when both the Enterprise Architecture Workspace application (version 9.2.1 or later) and the Technology Lifecycle Management plugin, sn_apm_tpm (version 1.11.0 or later), are installed. If either application is on an earlier version, the interface continues to show TPM.

The underlying technologies of the business applications used in your business enterprise have a shelf life. You must actively manage and monitor them to track their versions and life-cycle.

The software products used in your business applications can be operating systems, database management systems, development tools, and middle ware, each of which has a life cycle. If these life-cycle stages aren’t tracked, the vendor may not support them any longer. The business applications that run on these technologies are at stake.

Creating an inventory of all technologies used in the enterprise helps to:

- Track the versions of the software and manufacturer support dates for the software
- Set an internal life-cycle guidance for the software
- Assess the risks in using outdated software
- Plan to retire them just like the applications they support, at a definite date
- Support upgrade processes

By default, the data for the software products are populated from the Computer (CMDB_CI_Computer), Docker Container (CMDB_CI_Docker_Container), and Serverless Hardwares (CMDB_CI_Serverless_Hardware) tables and all similar instances. To include other CMDB tables that contain software products, update the system property *sn_apm_tpm.configurationItemsWithSoftwareInstalls*. For information on how to update the system property, see Update the system property to gather software products from a CMDB table.

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Installing the Technology Lifecycle Management plugin

For instructions to install Technology Lifecycle Management, see Activate the Technology Lifecycle Management (TLM) plugin.

Important: Technology Lifecycle Management (TLM) fetches the hardware life-cycle data for your enterprise. To fetch the software life-cycle data, you must activate the Software Asset Management (SAM) Professional plugin. Before installing the SAM Foundation plugin, carefully review the Basic Software Asset Management migration documentation.

TLM indicators in EA Workspace

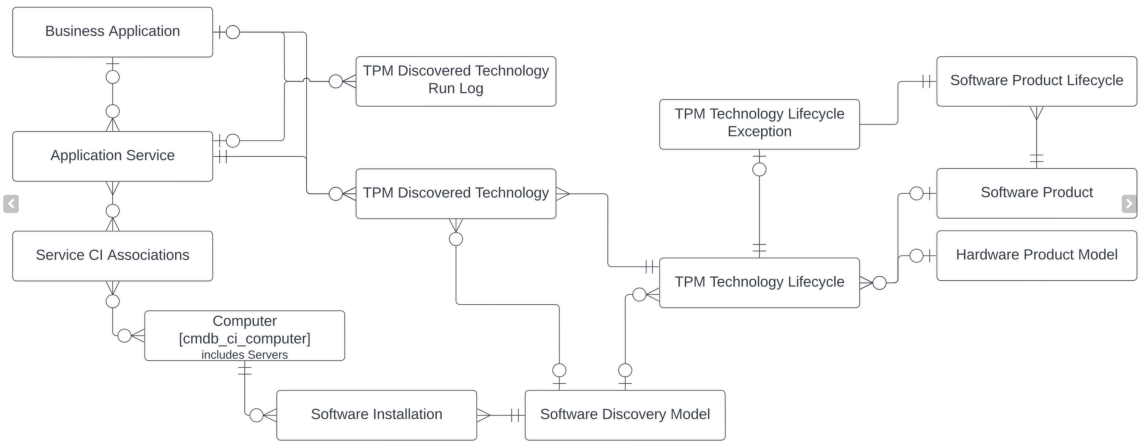
The following are the indicators for Technology Lifecycle Management (TLM) in EA Workspace:

Indicator	Description
Technology Lifecycle Risk [sn_apm_tpm_technology_risk]	Calculates the lifecycle risk score for business applications.

TLM reference model in EA Workspace

In EA Workspace, the Technology Lifecycle Management enables you to align technologies using the **Update TPM data** action from a business application record or using the schedule job *`Populate TPM Discovered Technologies and Lifecycles`*.

TLM Reference Model



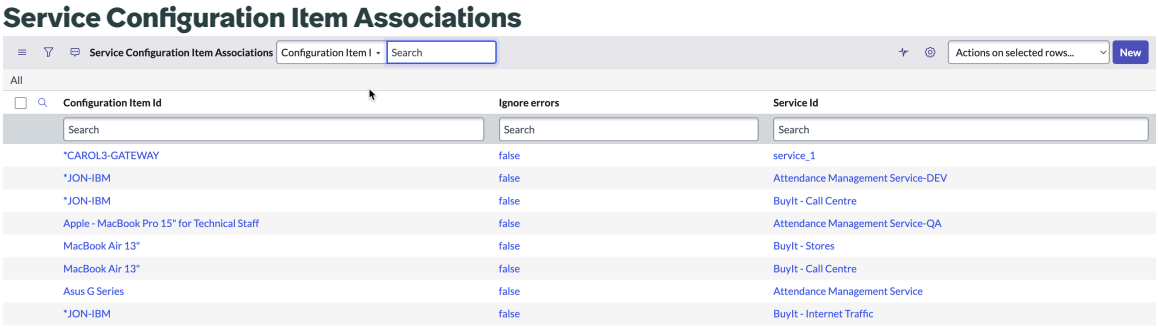
Technology discovery process in EA Workspace

The following is the technology discovery and alignment process for business applications in the EA Workspace.

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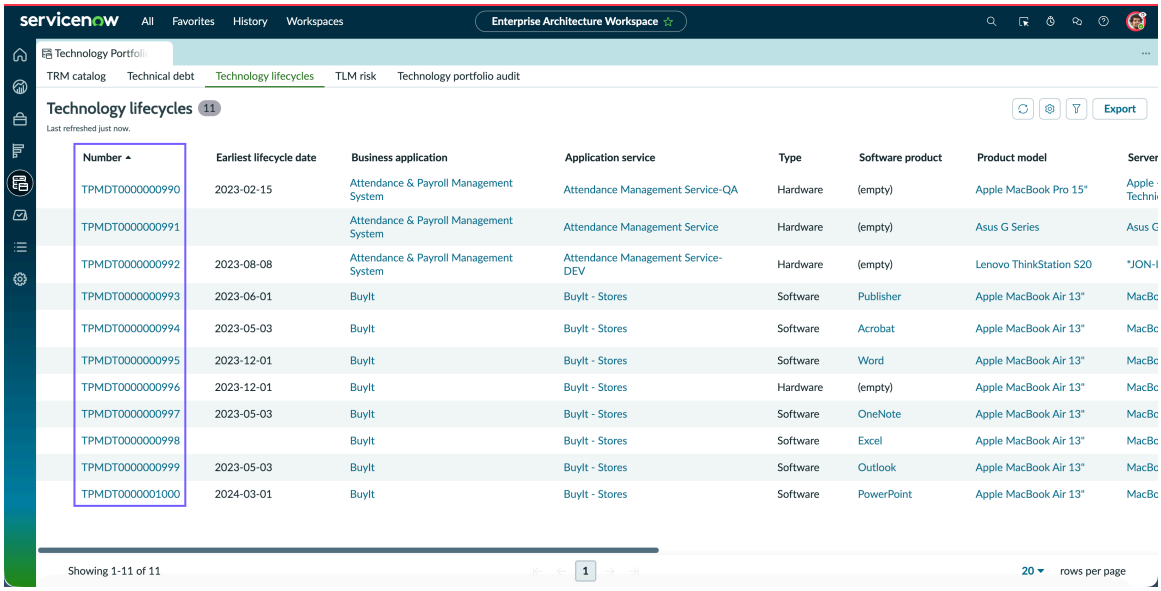
- Query and fetch the Consumes::Consumed by Application Services.

  Note: It must be an Application Service and these Application Services must be mapped. The Service Configuration Item Associations [svc_ci_assoc] table is populated for each Application Service and its Computers.



- For each computer identified in the Service Configuration Item Associations [svc_ci_assoc] table, you can see the installed software by selecting the Software Installations tab. Also, if a Hardware Model is associated with the computer, you can see the Hardware type details in the TLM Discovered Technologies tab.
- For each software install, you can see the associated discovery model. The software discovery models must be of a product type Licensable or Unknown and they must be normalized or manually normalized to get any appropriate information. You can also also use the *sn_apm_tpm.softwareDiscoveryModelProductFilterForTPMsystem* property to gather data on non-licensable software products. For information see, Filter software results using an encoded query in TLM.
- For each discovery model, create a TLM Discovered Technology record.
- When you create a record for the TLM Discovered Technology, it triggers the creation of an associated TLM Technology Lifecycles record and it fetches the lifecycle information for the hardware or software technology. An unique TLM lifecycle record identifier is also generated. On selecting the record identifier, more information on the TLM lifecycle record is displayed.

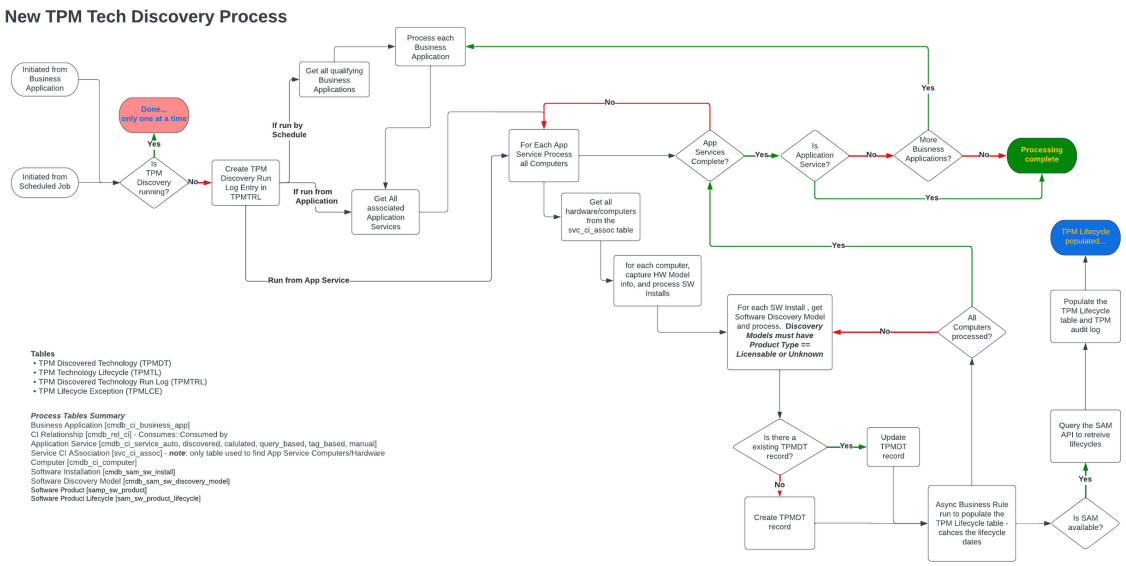
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Note:

- TLM lifecycle record identifiers are automatically generated on creating a TLM record using the Technology Lifecycle Management (sn_apm_tpm) plugin version 1.9.0. However, for TLM lifecycle records generated using previous versions of the TLM plugin don't have any lifecycle record identifiers. The TLM record identifiers of these TLM lifecycle records must be generated using the Populate Number field in *`TPM Discovered Technologies`* job. For information, see Run a scheduled job to populate Technology Lifecycle Management lifecycle record identifier.
- You can zoom on this page to 200% or 400% through your browser settings without the loss of content or functionality. Page layouts are transformed into a vertical, stacked view automatically.

Technology life-cycle discovery process in EA Workspace



For successful software alignment records, you must have the following tables populated:

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- Business Application [cmdb_ci_business_app]
- CI Relationship [cmdb_rel_ci] - Consumes::Consumed by
- Service Instance [cmdb_ci_service_auto, discovered, calculated, query_based, tag_based, manual]
- Service CI Association [svc_ci_assoc] - note: Only table used to find App Service
- Computers/Hardware Computer [cmdb_ci_computer]
- Software Installation [cmdb_sam_sw_install]
- Software Discovery Model [cmdb_sam_sw_discovery_model]
- Software Product [samp_sw_product]
- Software Product Lifecycle [sam_sw_product_lifecycle]

Note: Depending on your how you have setup your instance, other tables can also contain software records. Check with your administrator.

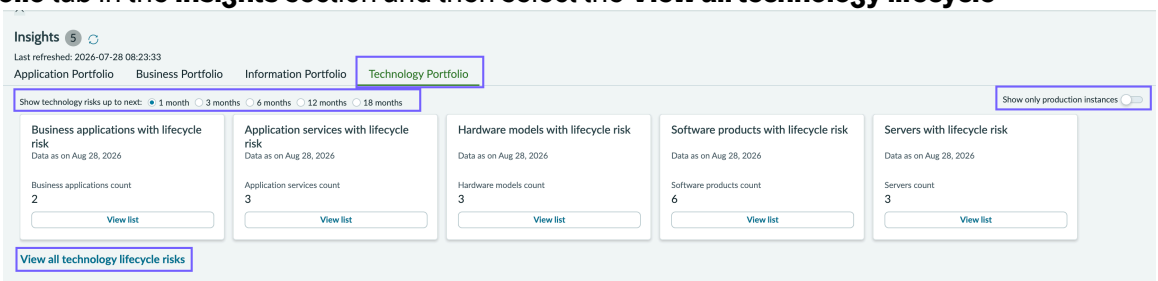
Hardware requires the Hardware Model reference on the Computer be populated.

Update TLM Data for a business application or application service

You can manually refresh the TLM life-cycle data manually for a selected business application or application service. A scheduled job *`Populate TPM Discovered Technologies and Life-cycles`* is also run on schedule or on-demand to update the life-cycle data for all business applications and application services. For more details, see Update TPM data for a business application or application service and Run a scheduled job to generate TPM lifecycle data.

View insights for technology life-cycle risks

You can track the technology lifecycle risk for business applications, application services, servers, software products, and hardware models. The *`Populate TPM Discovered Technologies and Life-cycles`* scheduled job shows the lifecycle results in the **Insights** section of the EA Workspace home page. Select the **Technology Portfolio** tab in the **Insights** section and then select the **View all technology lifecycle risks**.



- Use this filter to see the risks for the next 1 month, 3 months, 6 months, 12 months, and 18 months. By default, the 1 month filter is applied.
- Use the **Show only production instances** toggle button to see only production instances that are having technology lifecycle risks. By default, this filter is off.
- Select the **View all technology lifecycle risks** link to see the list of all technology lifecycle risks sorted by earliest lifecycle date. This is the earliest date when a technology lifecycle risk is to happen. You can export the information to Excel, CSV, JSON, or PDF as required.

  The data in the Technology lifecycle risks table is fetched from the TLM Discovered Technologies [sn_apm_tpm_discovered_technology] table.

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- Execute the Populate Technology Lifecycle Risks scheduled job to generate the TLM technology lifecycle risks. This scheduled job populates the risk scores for business applications (BA), application services (AS), software products, and hardware models. The scores are calculated for a fiscal period of type month in the Technology lifecycle risks (sn_apm_tpm_technology_risk) table. For more details, see Schedule a job to generate TPM technology risk.

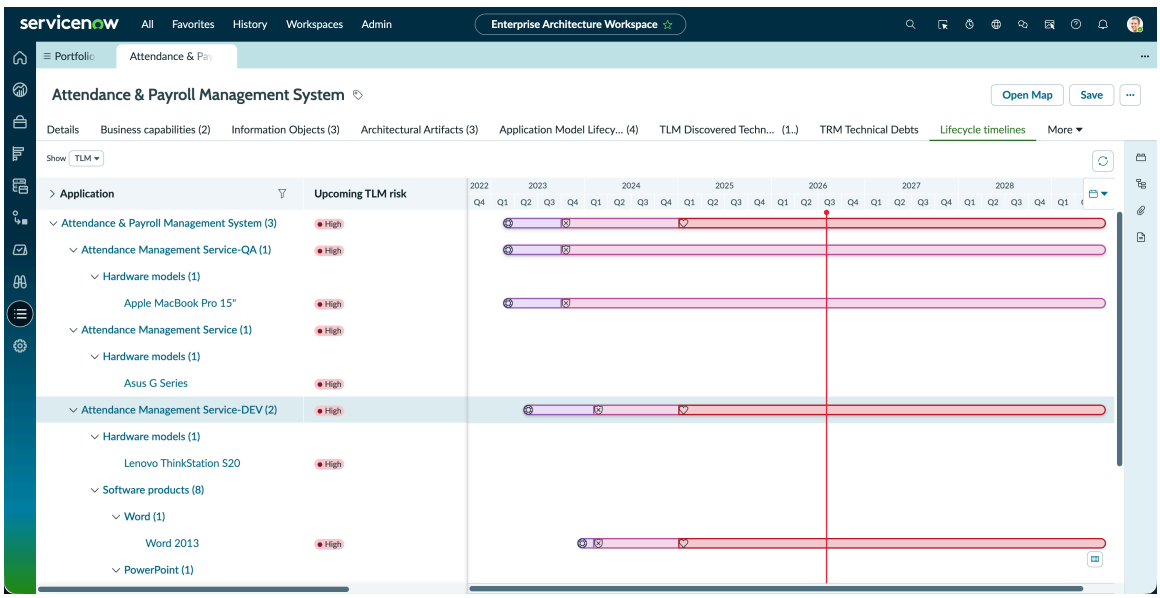
View TLM analysis run logs

You can track the progress of TLM analysis by examining the TPM Discovered Technology Run Logs [sn_apm_tpm_discovered_technology_run_log] table. Each time the analysis is run, an entry is added to this table. Navigate to *EA Workspace* > **Setup** > **Logs** section view the logs.

TLM lifecycle timelines on Gantt chart

For the Technology Lifecycle Management (TLM), the business applications and their related application services (associated hardware models and software products) are displayed in a hierarchical structure. The corresponding timelines of the application services are displayed as bars on the Gantt chart.

The application services (composed of software products and hardware models) have lifecycle timelines determined for them. On the Gantt chart, the earliest TLM phase start date of either the software products or hardware models are rolled up. This calculates the TLM phase start date of the overall application service. That is, the earliest TLM phase start date of any software product or hardware model is taken as the TLM phase start date of the application service, overall. For more details, see TLM lifecycle timelines on Gantt chart and View TPM and TRM lifecycle timelines on the Gantt chart.



Data visualization for TLM data

In the Enterprise Architecture Workspace Dashboard, the 'Top 10 business applications with normalized TLM risk' widget shows the top 10 business applications having normalized TLM risk. For more details, see Explore the Enterprise Architecture Workspace dashboard.

Related topics

Working with Technology Lifecycle Management (TLM) in EA Workspace

Gantt view of TLM and TRM lifecycle timelines

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TLM lifecycle timelines on Gantt chart

View TPM and TRM lifecycle timelines on the Gantt chart

Technology risk calculation in Enterprise Architecture Workspace

Assess the technology risks of your business applications by calculating their risks. Technology risks are calculated at the hardware model and software product levels to determine the risk at the business application level.

Important:

Technology Lifecycle Management (TLM) was previously known as Technology Portfolio Management (TPM). TPM and TLM refer to the same feature. Table names and scheduled job names continue to use TPM and haven't been renamed.

Whether your instance displays TPM or TLM also depends on your application versions. TLM labels appear only when both the Enterprise Architecture Workspace application (version 9.2.1 or later) and the Technology Lifecycle Management plugin, sn_apm_tpm (version 1.11.0 or later), are installed. If either application is on an earlier version, the interface continues to show TPM.

Technology risks are calculated at the hardware model and software product (considering the model and full version) levels to determine the risk at the business application level.

Lifecycle stage - Internal and External

The range set for a risk value at each level such as very high, late, moderate, low, and none vary from one organization to another. You can set the risk value for each lifecycle phase based on your organizational requirements. Use the software product lifecycle form to associate the lifecycle phase for each software model with a risk. Based on the selected risk the parameter risk is determined.

The risk values in the lifecycle table are very high, high, moderate, low, and none. Accordingly the risk is also very high, high, moderate, low, or none.

For lifecycle stage parameters, only the risk value is considered irrespective of the lifecycle phase.

Aging - Internal and External

Similarly, the aging internal and external has the following risk values:

- 0–90 days is high risk.
- 90–180 days is moderate risk.
- More than 180 days is low risk.

Based on the internal and publisher lifecycle stages and the internal and publisher aging stages, the risk of the hardware and software models are calculated as follows:

- If there is a single High risk, then the risk of the software model is High.
- If there is a single Moderate risk, then the risk of the software model is Moderate.
- The risk of the software model is Low only if the risk of all the underlying components are Low.
- If there is a single High risk, then the risk of the hardware model is High.
- If there is a single Moderate risk, then the risk of the hardware model is Moderate.
- The risk of the hardware model is Low only if the risk of all the underlying components are Low.

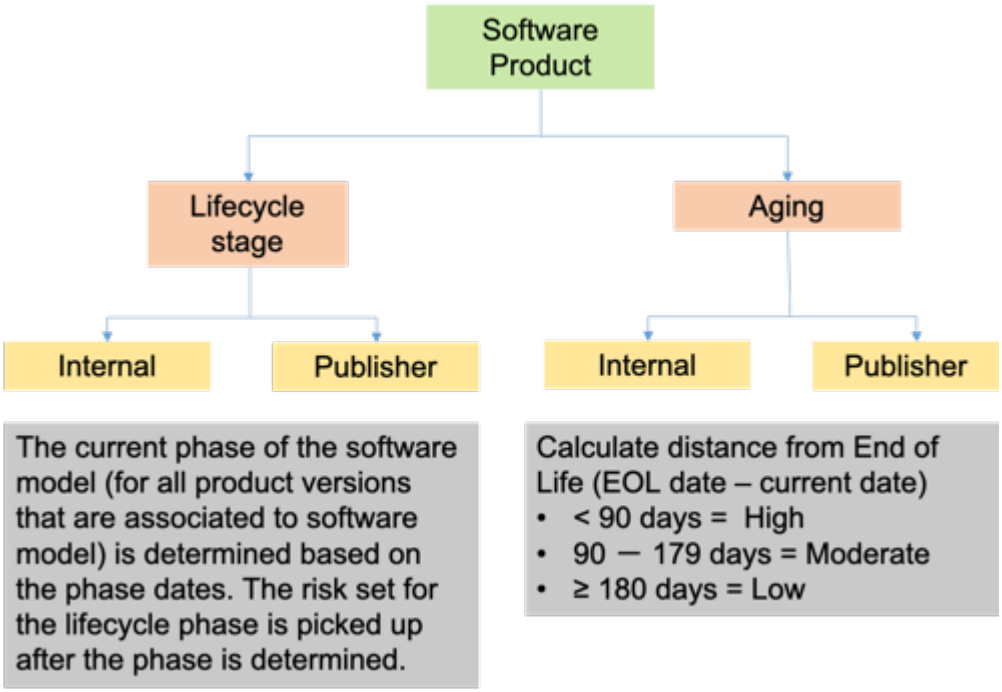
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Note: The engine first calculates the risk at the hardware and software models, it then calculates risk at the application service level, based on the risks of all the underlying hardware and software models. Finally it calculates the risk at the business application level based on the risk of the production instances which are nothing but production application service.

The risk calculation for aging parameters are scripted and you can edit as required.

Parameters to determine software product risk

Parameters to determine risk at software model level

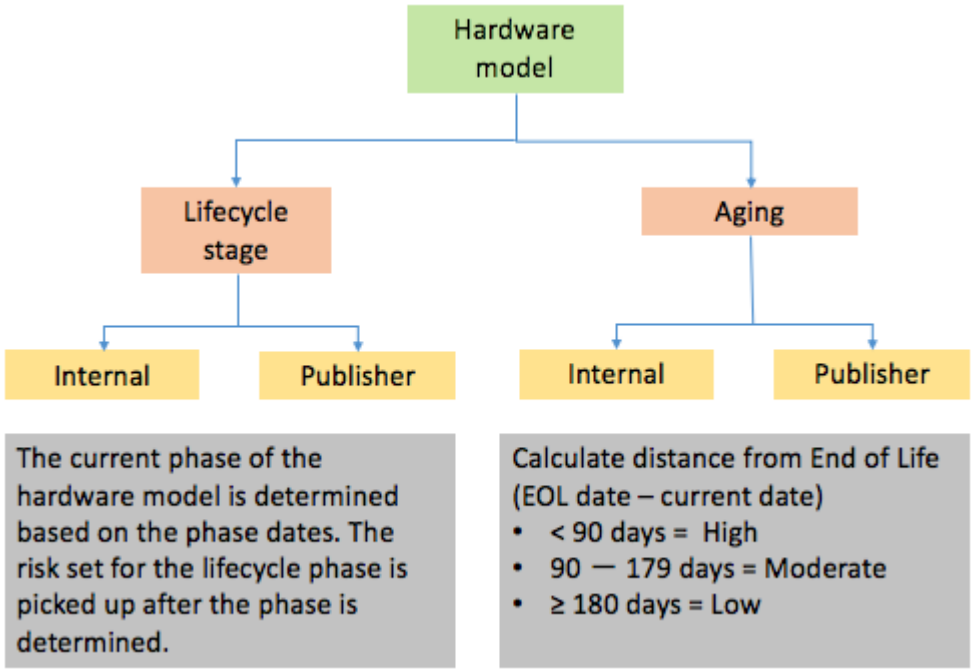


Risk on a software model is calculated based on four parameters, namely internal lifecycle stage, external lifecycle stage, internal aging, and external aging.

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Parameters to determine hardware model risk

Parameters to determine risk at hardware model level

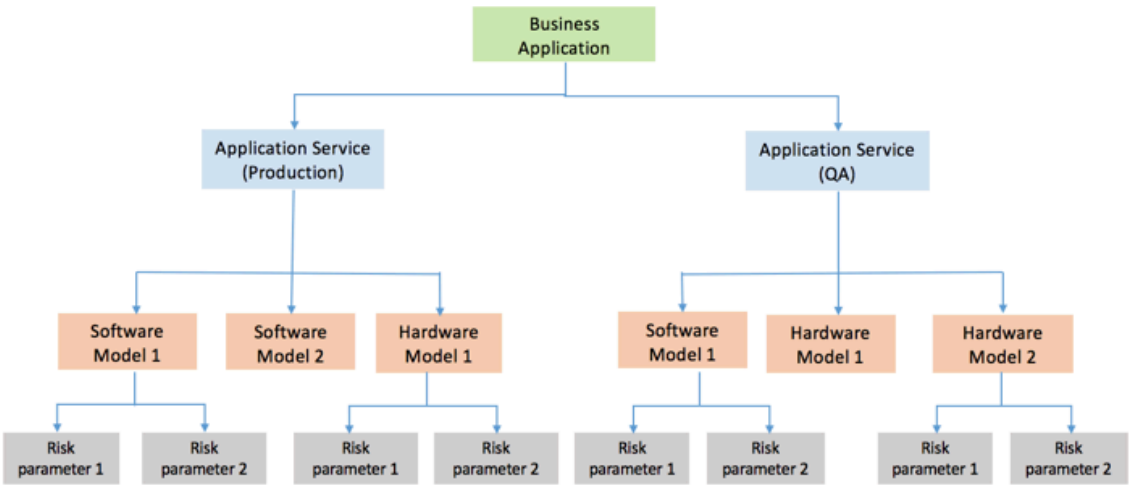


Risk on a hardware model is calculated based on four parameters. The parameters are internal stage risk, publisher stage risk, internal aging risk, and publisher aging risk.

Calculating technology risk at business application level

A business application can run on many software models. The risk of a business application due to its underlying software models is derived from the risk of the individual software models.

Calculating risk at the business application level



Risk at hardware model level

The technology model suggestion engine calculates the risk of the hardware model based on the four hardware risk parameters. The highest risk value is assigned to the hardware model. If the risk of hardware is high, then the risk of the application service, which runs on the hardware, is evaluated to be high. The engine stores the risk data of the hardware model in the Hardware Model Risks [sn_apm_tpm_hardware_model_risk] table.

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Risk at software model level

Based on the four software risk parameters, the technology model suggestion engine calculates the risk of the software model. If the risk of software is high, then the risk of the application service, which runs on the software, is evaluated to be high. The engine stores the risk data of the software model in the Software Model Risks [sn_apm_tpm_software_model_risk] table. This data is rendered on the software model timeline.

Risk at application service level

If any hardware or software model on which the application service runs is high risk, the application service is also high risk.

Risk at business application level

If the application service is of high risk, then the business application which runs on the application service is also high.

- If one of the software models is at High risk, then the business application is at High risk.
- If one of the software models is at Medium risk, then the business application is at Medium risk.
- The risk of the business application is Low only if all the underlying software models have a Low risk.
- If one of the hardware models is at High risk, then the business application is at High risk.
- If one of the hardware models is at Medium risk, then the business application is at Medium risk.
- The risk of the business application is Low only if all the underlying hardware models have a Low risk.

You can customize the script that is executed to calculate the risks at the product model risk level (hardware and software models). The script also calculates risks at the application service risk level and business application risk level.

Related topics

TLM lifecycle timelines on Gantt chart

Working with technology portfolio audit details

The#**Technology portfolio audit** tab shows audit information for your applications. An entry in this table indicates that at least one lifecycle for that software product or hardware model was either approximated, or not found, or doesn't exist.

Important:

Technology Lifecycle Management (TLM) was previously known as Technology Portfolio Management (TPM). TPM and TLM refer to the same feature. Table names and scheduled job names continue to use TPM and haven't been renamed.

Whether your instance displays TPM or TLM also depends on your application versions. TLM labels appear only when both the Enterprise Architecture Workspace application (version 9.2.1 or later) and the Technology Lifecycle Management plugin, sn_apm_tpm (version 1.11.0 or later), are installed. If either application is on an earlier version, the interface continues to show TPM.

The data in the **Technology portfolio audit** table is fetched from the TPM Technology Lifecycle Exception [sn_apm_tpm_technology_lifecycle_exception] table.

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As an admin user, you can run the *Populate TPM Discovered Technologies and Lifecycles* scheduled job on-demand to calculate the technology lifecycle risk for your application portfolio. The scheduled job executes the script to generate lifecycle risk dates by querying the ITAM content library. These dates include end of support, end of extended support, and end of life for your software products and hardware models.

For more details, see Run a scheduled job to generate TPM lifecycle data.

Whether the script runs on demand or scheduled, you can view the results in the **Enterprise Architecture Workspace** > **Setup** > **Logs**.

Example: Benefits of running a technology portfolio audit

If the software product full version is 9.2.1, it may be that the **End of Support** lifecycle version in the Software Asset Management content library was only full version 9.2. This audit table helps you to evaluate the lifecycle matching information based on the details of the products being used in your organization. The table helps you to identify exact lifecycle version matches. It also identifies when no valid lifecycle version could be found against the software product or hardware model version used in your organization.

Related topics

View technology portfolio audit risk details

Technology portfolio audit form

Exploring Enterprise Modeling and Visualization in the EA Workspace

Enterprise Modeling and Visualization in EA Workspace helps you with diagramming and modeling capabilities and enable you to model the future state of your IT and its relationship to the business landscape.

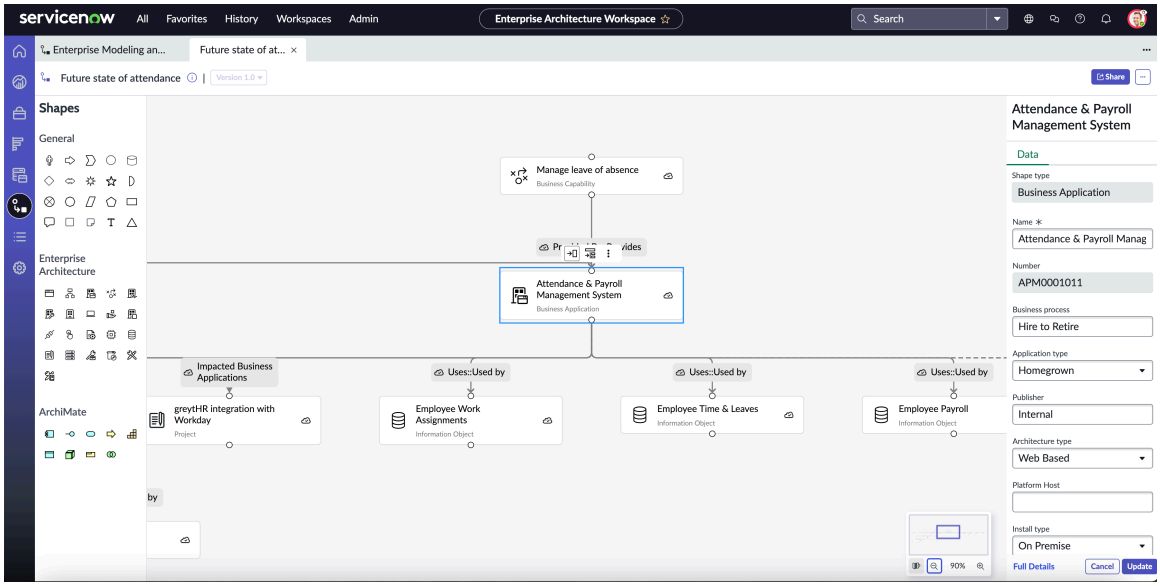
https://player.vimeo.com/video/1073997261?h=c5ebb67ef2&badge=0&autopause=0&player_id=0&app_id=58479

You can use the Enterprise Modeling and Visualization [com.snc.apm_modelling_tool] functionality in EA Workspace to create diagrams for your applications hierarchy and associate them with architectural artifacts. These diagrams enable decision makers to make informed decisions.

Creating diagrams helps you in the following:

- Visual representation: Diagrams and models represent complex enterprise structures, processes, and relationships for stakeholders including executives and IT teams.
- Effective communication: Diagrams provide a shared visual language for technical and non-technical stakeholders, supporting collaboration across teams and departments.
- Improved decision making: Decision makers can assess the impact of proposed changes, evaluate scenarios, and identify potential risks before implementing strategies or projects.
- Alignment with business goals: Diagrams and models help align IT initiatives with overall business goals, providing a view of the business and verifying that IT investments are strategically aligned with business goals.
- Change management: Modeling capabilities illustrate how changes affect the enterprise, supporting planning and execution of transformations with minimal disruption.
- Regulatory and governance: Modeling provides a structured framework for managing architectural artifacts and documenting adherence to architectural guidelines.
- Efficiency and cost reduction: Identifying redundancies, optimizing processes, and streamlining operations can help reduce costs and improve operational efficiency.

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Note: You can zoom on this page to 200% or 400% through your browser settings without the loss of content or functionality. Page layouts are transformed into a vertical, stacked view automatically.

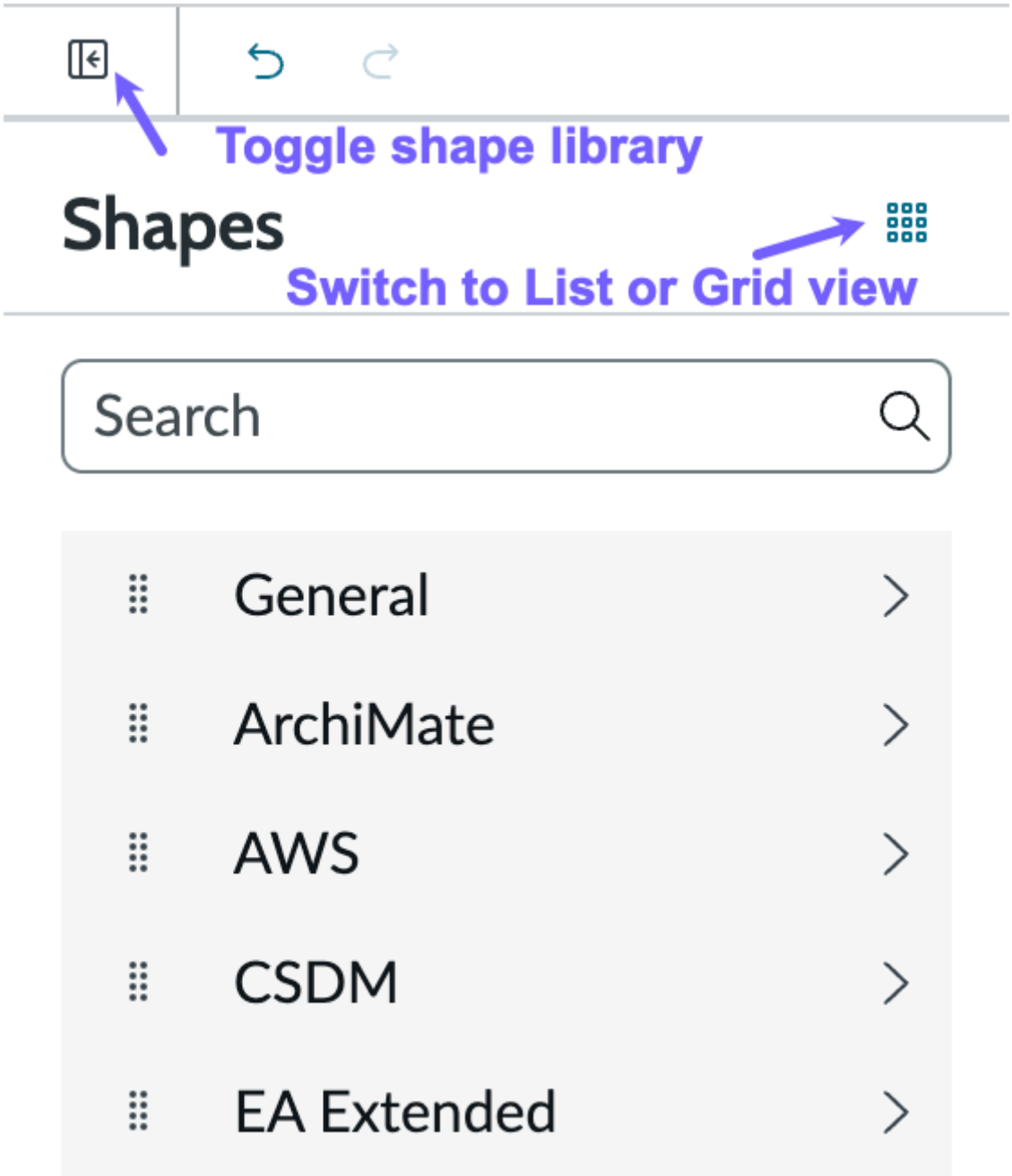
Install the Enterprise Modeling and Visualization application

You can install the Enterprise Modeling and Visualization [com.snc.apm_modelling_tool] from the ServiceNow Store.

Working with diagrams

- **Shapes**: Use different shapes to create a diagram. Available shapes are:
  - General shapes
  - AWS shapes
  - CSDM shapes
  - EA Extended shapes
  - ArchiMate® shapes (ArchiMate is a registered trademark of The Open Group)
  - BPMN shapes

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Use the Toggle Shape Library icon to show or hide the shapes panel on the canvas.

Use the Switch to List or Grid view icon to switch between list view and grid view of the shapes for all the shape libraries.

You can add a shape to the canvas by either selecting the shape or by dragging the shape from the **Shapes** palette to the canvas.

You can also adjust the size of shapes by selecting a shape and then drag any of its edges or corner handles. Dragging outward increases the shape dimensions; dragging inward reduces its size.

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When you hover over a shape icon in the **Shapes** panel, a preview popover appears to the right of the panel. The popover shows a larger view of the shape and its label. Moving to a different shape icon, using either the mouse or the arrow keys, updates the popover to the new shape. The popover closes when you move the mouse away from the icon, press Tab on the keyboard, start dragging a shape, or scroll the panel.

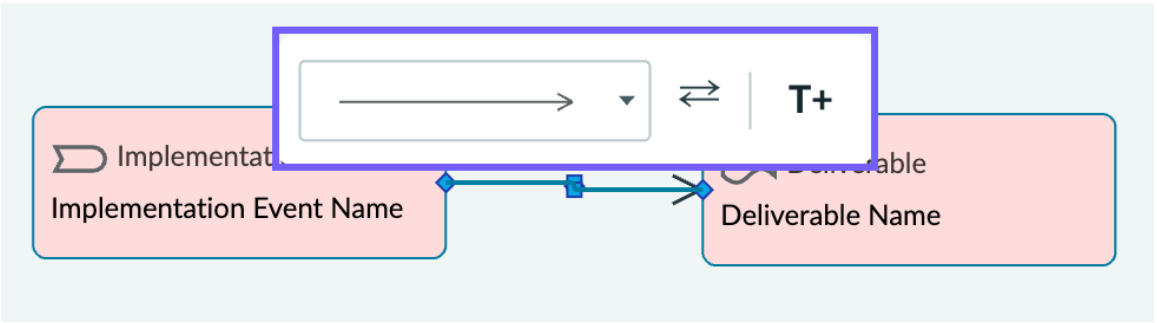
- **Label connector lines**: Select a connector line between shapes in a diagram and select **T+** in the connector toolbar to add a label. For more information, see Add labels to connector lines between shapes in a diagram.

  You can perform the following actions for the labels:

  - Add multiple labels on a single relationship line
  - Drag and move labels
  - Delete individual labels without deleting the relationship
  - Use undo or redo action for a label

  Note: In read-only mode or after the diagram is submitted for approval, label actions are unavailable.

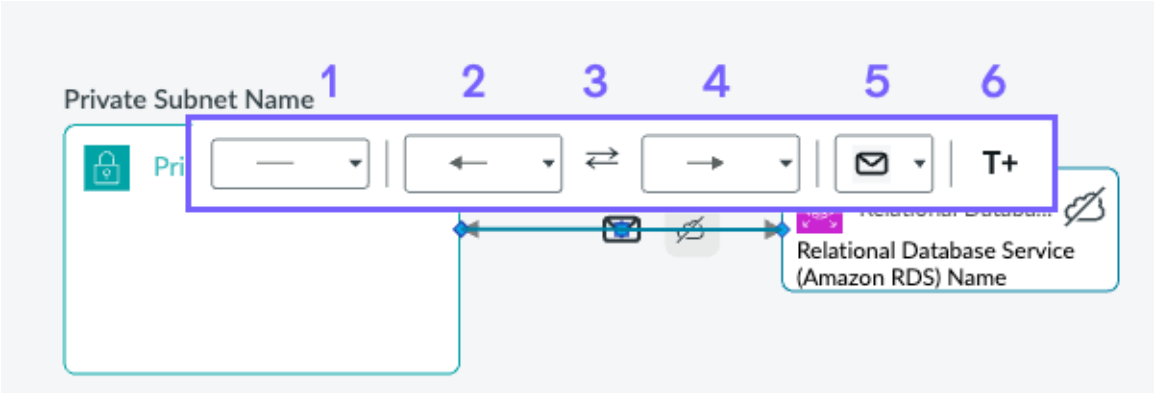
- **Connector line properties**: Select a connector between two shapes to display a toolbar above the connector. The toolbar has two forms depending on the notation of the connected shapes:
  - If both connected shapes are ArchiMate shapes, the toolbar shows the following controls:
    - **Relationship type**: Sets the ArchiMate relationship type from a predefined list, including Access, Aggregation, Assignment, Association, Composition, Flow, Influence, Realization, Serving, Specialization, Triggering, and Used by.
    - **Swap direction**: Reverses the connector orientation, switching the left and right sides.
    - **T+**: Adds a text label to the connector.

  - If at least one connected shape is a non-ArchiMate shape (for example, a CSDM or AWS shape), or when connecting shapes from two different notations, the toolbar shows the following controls:
    - **Line style**: Sets the connector line to solid, dashed, or dotted.
    - **Start arrow**: Sets the arrowhead style at the starting end of the connector.
    - **Swap direction**: Reverses the connector orientation, switching the left and right sides.
    - **End arrow**: Sets the arrowhead style at the ending end of the connector.

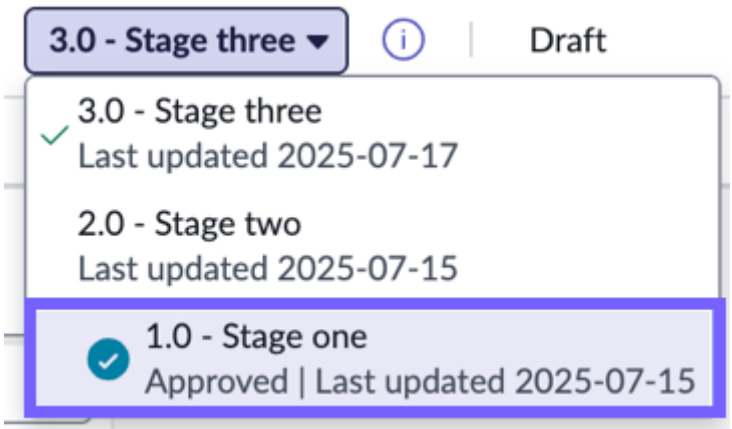
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- **Icon**: Adds a BPMN message flow decorator icon to the connector.
- **T+**: Adds a text label to the connector.

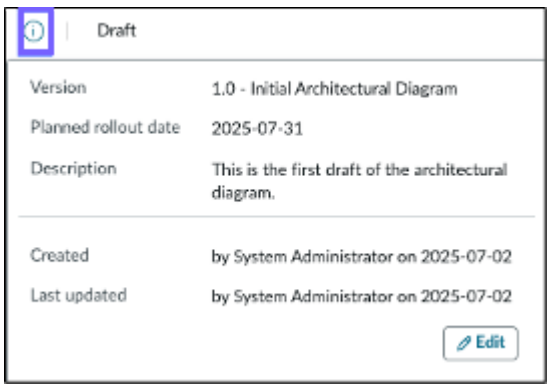


For more information, see Shape connector properties in Enterprise Modeling and Visualization and Set shape connector properties in Enterprise Modeling and Visualization.

- **Version**: This field enables you to view and open a different version of the diagram.

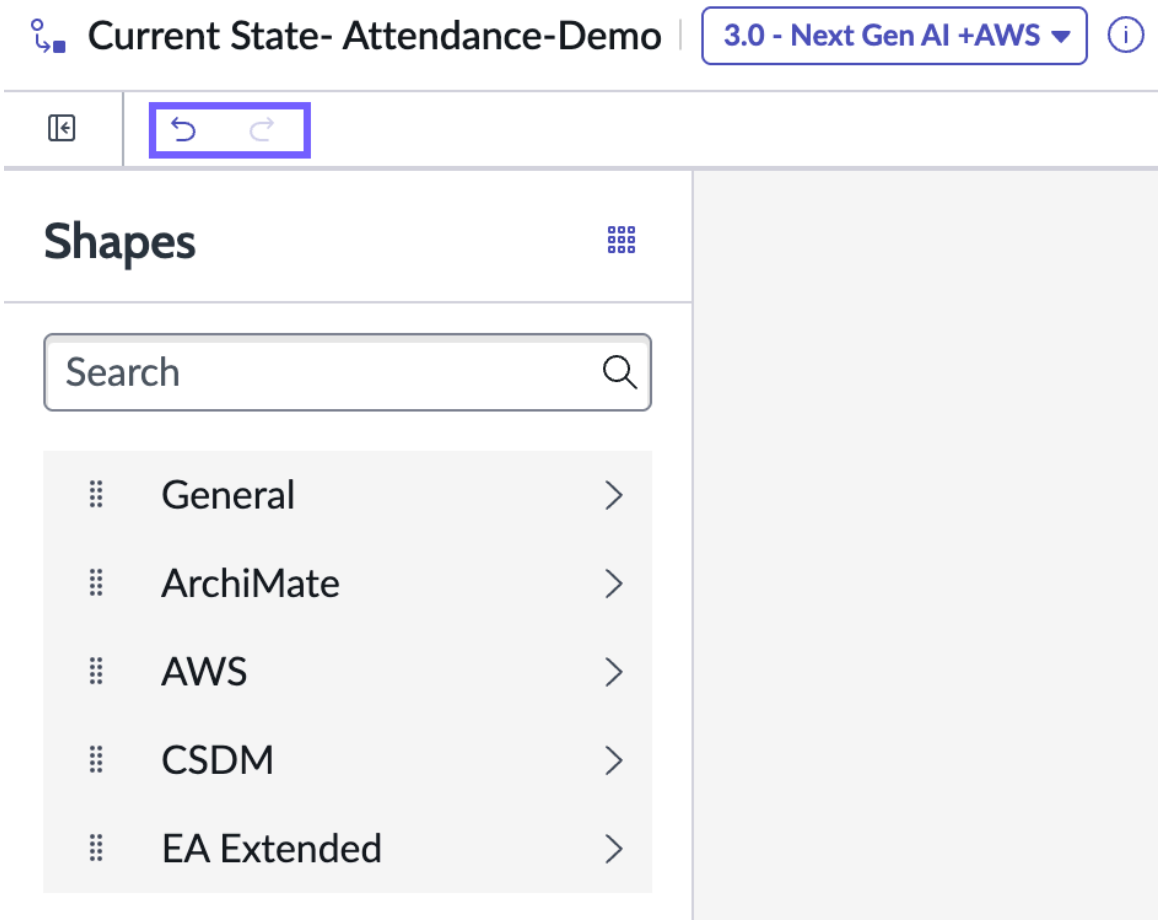


- **View details**: Use this option to view version-specific details of your diagram such as version label, description, and planned rollout date.



- **Undo** and **Redo**: Use this option to revert or reinstate recent changes made to a diagram. You can also use the keyboard shortcuts to perform the undo and redo action.

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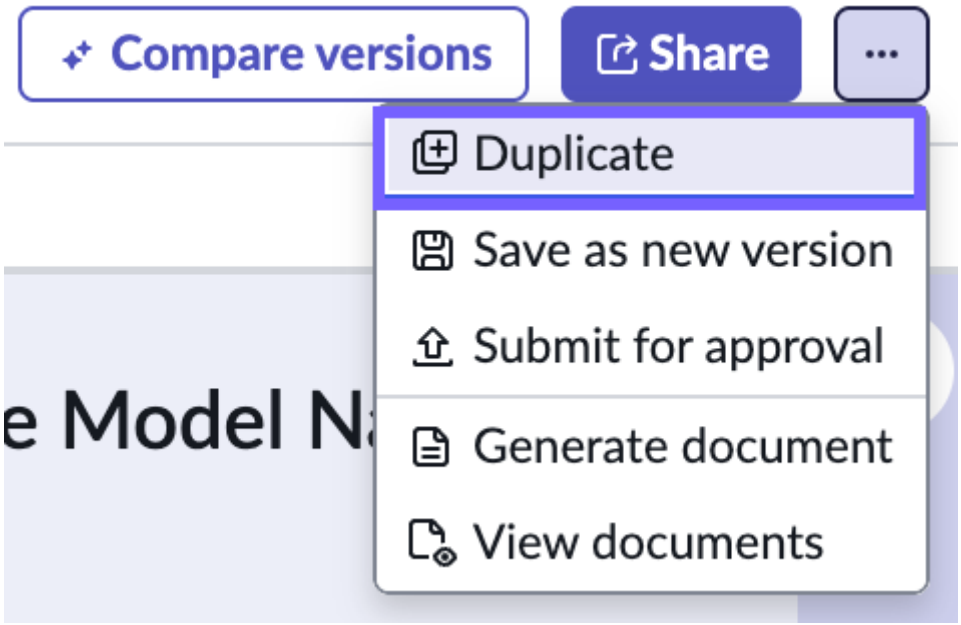


- **Align and distribute shapes**: Select two or more shapes on the canvas to align them to a common edge or center. Select three or more shapes to also distribute them at equal spacing. For more information, see Align and distribute shapes in a modeling diagram.

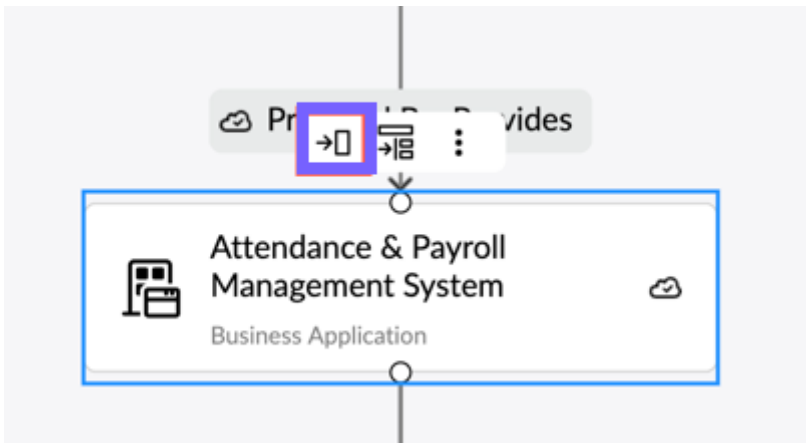


- **Share**: Use this option to share the diagram with your peers.
- **Commit changes**: Use this option to synchronize the diagram to the repository. This option is available only when the diagram is approved.
- **Save as new version**: Use this option to create a version of the diagram within the same artifact.
- **Duplicate**: Use this option to duplicate an existing diagram and save it as a new artifact.

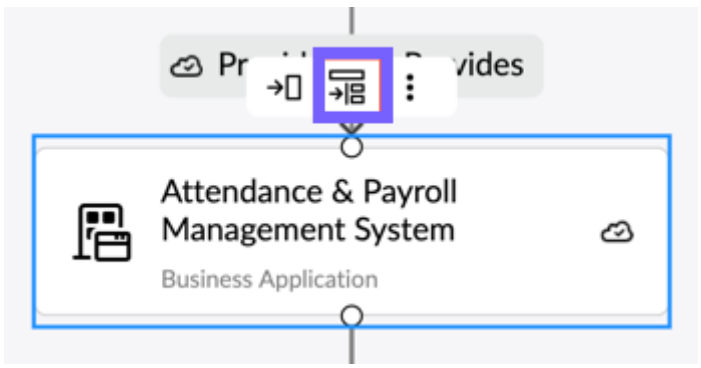
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- **Open side panel**: Select a shape in the diagram to see this option. Use this option to open the selected object details in a side panel. If the shape is connected to an existing ServiceNow element, the details are fetched from the database and shown in the side panel. Update the details as required. You can select the Full details link to open the full form.

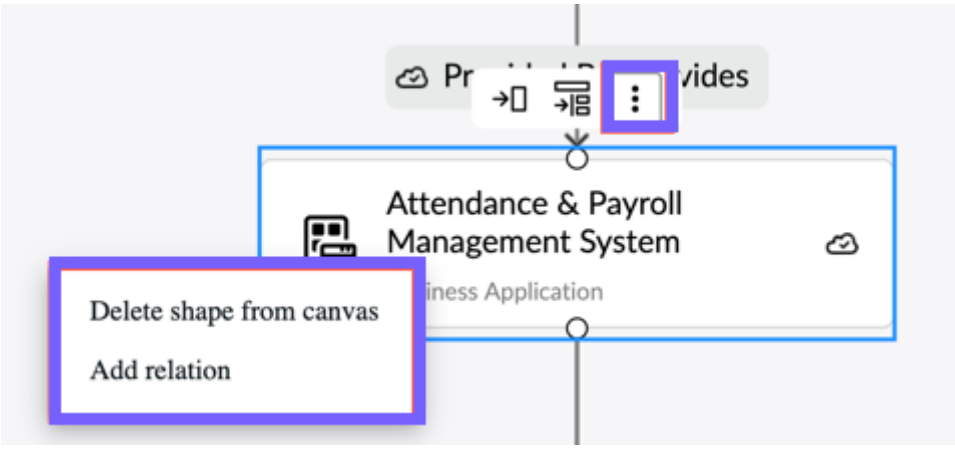


- **Add related records**- Select a shape in the diagram to see this option. Use this option to fetch and add the objects and their relationships with reference to the selected object.



- **More actions**- Select the three dots menu to see the following options:

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- **Delete shape from canvas** to remove the selected shape from the canvas.
- **Add relation** to add relationships with reference to the selected object.

Keyboard navigation on the diagram page

Enterprise Modeling and Visualization supports keyboard navigation across the diagram canvas, panels, shapes, and dialogs.

You can use the keyboard to move between shapes, groups, pools, swimlanes, and nested elements on the canvas. Focus indicators clearly show the currently selected item. You can access shape and relationship context menus using the keyboard. Use these menus to open the side panel, view related records, add or edit relationship text, and delete or add relations.

The following table lists the keyboard shortcuts available for navigating:

Keyboard navigation reference

Key	Action
Tab or Shift + Tab	Move focus forward or backward between canvas elements, panels, and controls.
Arrow keys (↑ ↓ ← →)	Navigate between shapes, nested elements, libraries, lists, pools, and swimlanes.
Enter	Select the focused shape, relationship, or control.
Shift + Enter	Move focus to shape or relationship adornments.

Related topics

- Working with Enterprise Modeling and Visualization
- Configure Enterprise Modeling and Visualization
- Add or edit diagram version details
- Shape connector properties in Enterprise Modeling and Visualization
- Set shape connector properties in Enterprise Modeling and Visualization
- Add labels to connector lines between shapes in a diagram
- Approve or reject a modeling diagram request

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Delete a shape

Delete Enterprise Modeling and Visualization diagrams

Shapes to create a modeling diagram

The shapes available in Enterprise Modeling and Visualization help you create diagrams. You can add a shape to the canvas by either selecting the shape or by dragging the shape from the **Shapes** palette to the canvas.

Available shapes to create a diagram

Shapes are icon representations in the Enterprise Modeling and Visualization. You can use these shapes to create diagrams for your business capability and applications hierarchy.

Note: In a diagram, hover over a shape to see the connector ports for it.

You can adjust the size of shapes by selecting a shape and then drag any of its edges or corner handles. Pulling outward increases the shape's dimensions, while dragging inward reduces its size.

Following are the different types of shapes available to create diagrams:

- General shapes
- Enterprise Architecture shapes
- ArchiMate® shape (ArchiMate is a registered trademark of The Open Group)
- Business Process Modeling Notation (BPMN) shapes

Note: You must activate the following plugins to view the respective shapes:

- SAM Foundation plugin to view the Software product shape
- Digital Integration plugin to view the Digital Integration and Digital Interface shapes
- PPM Standard plugin to view the Project shape
- CMDB CI Class Models (app-cmdb-content) plugins to view the SDLC component shape

General shapes

The general shapes section provides basic design elements that can be used to construct diagrams. By inserting icons such as arrows, circles, and text boxes, you can visually represent concepts, relationships, and processes in a clear and structured manner.

You can add a shape to the canvas by either selecting the shape or by dragging the shape from the **Shapes** palette to the canvas.

You can also adjust the size of shapes by selecting a shape and then drag any of its edges or corner handles. Pulling outward increases the shape's dimensions, while dragging inward reduces its size.

General shapes in Enterprise Modeling and Visualization

Shape	Name
	Actor

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General shapes in Enterprise Modeling and Visualization (continued)

Shape	Name
	Arrow
	Chevron
	Circle
	Cylinder
	Diamond
	Double ended arrow
	Eight pointed star
	Five pointed star
	Half eclipse
	Junction
	Octagon
	Parallelogram
	Pentagon
	Rectangle
	Speech bubble
	Square
	Sticky note
	Text box
	Triangle

Amazon Web Services (AWS) shapes

The AWS shapes library in EA Workspace helps in modeling cloud architectures. These shapes allow architects to design future-state cloud diagrams aligned with CMDB and CSDM standards.

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AWS shapes in Enterprise Modeling and Visualization

You can add a shape to the canvas by either selecting the shape or by dragging the shape from the **Shapes**

You can also adjust the size of shapes by selecting a shape and then drag any of its edges or corner handles. Pulling outward increases the shape's dimensions, while dragging inward reduces its size.

Note: Connector ports on AWS shapes, including AWS Group shapes, are bi-directional. You can use any connector port—top, bottom, left, or right—as either an input or an output when connecting shapes in a diagram.

AWS Group shapes

Shape name	Description
AWS Account 	Represents a single AWS account, which acts as an isolated container for resources, billing, and security policies. Use this shape to group all resources belonging to one account, especially in multi-account architectures.
Availability Zone 	A physically separate data center within an AWS Region, designed for fault isolation. Place inside a Region shape to show redundancy and high availability.
Private Subnet 	A subnet within a VPC that does not have direct internet access. Used for backend services or databases. Nest inside a VPC shape and indicate routing through NAT Gateway for outbound traffic.
Amazon Virtual Private Cloud 	A logically isolated section of the AWS cloud where you define IP addressing, subnets, and routing. Acts as the primary network boundary. Group subnets, gateways, and security components inside this shape.
Security Group 	A virtual firewall that controls inbound and outbound traffic for AWS resources. Attach to EC2 instances or other resources to indicate security controls.
Auto Scaling Group 	A collection of EC2 instances managed together for scaling based on demand. Represent elasticity and resilience for compute workloads. Often linked to load balancers.
EC2 Instance Contents 	Represents the internal components or applications running on an EC2 instance. Use this shape to detail what is deployed inside the instance (for example, web server, app server).
Region 	A geographical area that contains multiple Availability Zones. Acts as the top-level

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AWS Group shapes (continued)

Shape name	Description
	grouping for all resources deployed in a specific location.

AWS Analytics shapes

Shape	Description
Kinesis 	A suite of services for real-time data streaming and processing. It enables ingesting, analyzing, and storing streaming data at scale. Use the general Kinesis shape when referring to the overall streaming platform or architecture.
Kinesis Data Firehouse 	A fully managed service for delivering real-time streaming data to destinations like Amazon S3, Redshift, OpenSearch Service, and third-party tools. Represented as the delivery pipeline for streaming data.
Kinesis Video Streams 	A service for securely streaming video from connected devices to AWS for analytics, machine learning, and storage. Shown in IoT or media architectures for video ingestion.
Kinesis Data Streams 	A core service for ingesting and processing real-time data streams. Represented as the main streaming data source feeding analytics or applications.
Opensearch Service 	A managed service for deploying and operating OpenSearch (formerly Elasticsearch) clusters for search and analytics. Shown as the search and indexing layer for logs and structured data.
Redshift 	A fully managed, petabyte-scale data warehouse for analytics and BI workloads. Represented as the central analytics engine for structured data.

AWS Containers shapes

Shape	Description
Task 	Represents a single unit of work in Amazon ECS (Elastic Container Service). A task is the instantiation of a task definition, which specifies the container images, CPU/memory requirements, and networking settings. Use this shape to show individual workloads running inside ECS clusters. Tasks can include one or more containers.

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AWS Containers shapes (continued)

Shape	Description
Amazon Elastic Kubernetes Service 	A managed Kubernetes service that simplifies running Kubernetes clusters on AWS without managing the control plane. Represented as the orchestration layer for containerized workloads. Often shown with worker nodes, pods, and integrated with IAM, VPC, and EBS for storage.
Elastic Container Service (Amazon ECS) 	A fully managed container orchestration service for running Docker containers on AWS. Shown as the orchestration layer for ECS clusters, managing tasks and services.

AWS Compute shapes

Shape	Description
Amazon Elastic Compute Cloud 	Amazon EC2 provides resizable compute capacity in the cloud. It allows you to run virtual servers (instances) on-demand, enabling flexible scaling for applications.
Lambda Function 	AWS Lambda is a serverless compute service that runs code in response to events without provisioning or managing servers. Represented as a function icon, often linked to API Gateway, S3, DynamoDB, or event sources. It's used in microservices and event-driven architectures.

AWS Database shapes

Shape	Description
MemoryDB 	MemoryDB is a fully managed, Redis-compatible, in-memory database service designed for ultra-fast performance and durability. Use this shape to represent caching or real-time data processing layers in applications requiring microsecond latency.
Relational Database Service (Amazon RDS) 	RDS is a managed service for relational databases, supporting engines like MySQL, PostgreSQL, MariaDB, Oracle, and SQL Server. Represents the managed database layer for transactional workloads.
Elasticache 	ElastiCache provides managed in-memory caching using Redis or Memcached. Shown as a caching layer between application and database tiers to reduce latency.

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AWS Database shapes (continued)

Shape	Description
Keyspaces (for Apache Cassandra) 	A scalable, managed database service compatible with Apache Cassandra for wide-column data models. Represents NoSQL workloads requiring high throughput and low latency.
DynamoDB 	A fully managed NoSQL database service for key-value and document data. Commonly used for serverless applications, microservices, and real-time data access.
RDS Instance 	Represents an individual database instance within Amazon RDS. Used to show specific database nodes in multi-AZ or read replica configurations.

AWS Networking and Content Delivery shapes

Shape	Description
VPN Gateway 	A Virtual Private Network (VPN) Gateway enables secure connectivity between your AWS Virtual Private Cloud (VPC) and on-premises networks over an IPsec VPN tunnel. Place inside the VPC boundary to show hybrid connectivity.
API Gateway 	Amazon API Gateway is a fully managed service for creating, publishing, and securing APIs at scale. Represented as the entry point for REST, HTTP, or WebSocket APIs, often linked to Lambda or backend services.
Customer Gateway 	Represents the on-premises endpoint for a VPN connection to AWS. Shown outside the AWS cloud, connected to VPN Gateway.
Route 53 	AWS Route 53 is a scalable DNS and domain name management service. Typically placed at the edge for routing traffic to AWS resources or external endpoints.
Network ACL 	A Network Access Control List provides stateless filtering of inbound and outbound traffic at the subnet level. Attach to subnets inside a VPC to indicate additional security.
Internet Gateway 	Enables communication between resources in a VPC and the internet.Shown at the VPC edge for public connectivity
VPN Connection 	Represents the secure IPsec tunnel between AWS VPN Gateway and Customer Gateway. Connects hybrid environments for secure data transfer.

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AWS Networking and Content Delivery shapes (continued)

Shape	Description
Application Load Balancer 	Distributes HTTP/HTTPS traffic across multiple targets (EC2, containers, Lambda). Shown in front of application tiers for high availability.
Route Table 	Defines how traffic is directed within a VPC. Attach to subnets to show routing logic.
NAT Gateway 	Enables instances in private subnets to access the internet without exposing them publicly. Placed in a public subnet, linked to private subnets via route tables.
Elastic Network Interface 	A virtual network interface that can be attached to an EC2 instance. Represented as a component of EC2 for network connectivity

AWS Security, Identity and Compliance shapes

Shape	Description
WAF 	AWS WAF protects web applications from common exploits and attacks such as SQL injection and cross-site scripting. It enables you to define custom security rules to filter HTTP(S) traffic. Represented as a security layer in front of Amazon CloudFront, Application Load Balancer, or API.
Certificate Manager (ACM) 	SACM simplifies the provisioning, management, and deployment of SSL/TLS certificates for AWS services and internal resources. Typically shown alongside Elastic Load Balancers, CloudFront, or API Gateway to indicate encrypted communication.
Cognito 	Cognito provides user authentication, authorization, and user management for web and mobile apps. It supports social identity providers and enterprise federation. Represented as an identity layer for applications, often linked to API Gateway or Lambda.

AWS Storage shapes

Shape	Description
Simple Storage Service (Amazon S3) 	Amazon S3 is an object storage service designed for storing and retrieving any amount of data from anywhere on the web. It's highly durable, scalable, and secure. Use this shape to represent object storage buckets in AWS architecture diagrams.

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AWS Storage shapes (continued)

Shape	Description
Volume 	Represents an Amazon Elastic Block Store (EBS) volume, which is a block-level storage device that can be attached to EC2 instances. Use this shape to indicate persistent storage for compute resources.
Volume Gateway 	Represents the AWS Storage Gateway Volume Gateway, which provides hybrid cloud storage by exposing cloud-backed volumes to on-premises applications. Use this shape to show integration between on-premises environments and AWS storage.

Related topics

- AWS shapes support in the Enterprise Modeling and Visualization
- Working with Amazon Web Services (AWS) shapes
- Create a diagram using AWS shapes

Common Service Data Model (CSDM) shapes

CSDM is a prescriptive data model that defines standardized relationships between service-related objects in the CMDB. The CSDM shapes represent these objects visually in diagrams, enabling architects to model business capabilities, applications, services, and technical components in alignment with the Now Platform.

CSDM shapes in Enterprise Modeling and Visualization

You can add a shape to the canvas by either selecting the shape or by dragging the shape from the **Shapes**

You can also adjust the size of shapes by selecting a shape and then drag any of its edges or corner handles. Pulling outward increases the shape's dimensions, while dragging inward reduces its size.

Note: Connector ports on CSDM shapes are bi-directional. You can use any connector port—top, bottom, left, or right—as either an input or an output when connecting shapes in a diagram.

CSDM Foundation shapes

Shape name	Description
Application Model 	Represents the product-level definition of an application, including its capabilities, lifecycle, and associated components. Serves as a catalog entry for applications in EA. Links to Business Applications and Software Models for traceability.
Business Process 	A sequence of activities or tasks that achieve a specific business outcome. Models operational workflows supporting business

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CSDM Foundation shapes (continued)

Shape name	Description
	capabilities. Enables process optimization and conformance mapping.
 Business Unit	Represents an organizational division responsible for specific functions or services. Provides structure for capability mapping and accountability.
 Consumable Model	Represents a product model for consumable items used in operations. Tracks lifecycle and inventory for consumables.
 Content Product Model	Represents digital or physical content products offered to customers or internal users. Supports cataloging and lifecycle management of content assets.
 Contract Model	Represents the template or model for contractual agreements. Standardizes contract creation and compliance tracking.
 Departments	Represents organizational departments for resource and responsibility mapping. Links organizational structure to capabilities and processes.
 Enterprise Good Model	Represents physical goods or assets managed by the enterprise. Supports asset lifecycle and procurement processes.
 Facility Model	Represents physical facilities or buildings used by the organization. Enables facility management and service mapping.
 Firmware Model	Represents firmware versions and configurations for hardware devices. Tracks firmware lifecycle and compliance.
 Hardware Model	Represents hardware product models used in IT infrastructure. Supports asset management and procurement planning.
 Product Feature	Represents a specific capability or function of a product. Enables feature-level planning and impact analysis.
 Service Model	Represents the template or definition of a service offered by the organization. Standardizes service design and lifecycle management.

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CSDM Foundation shapes (continued)

Shape name	Description
 Service Offering Model	Represents specific variations or tiers of a service model. Defines SLAs, pricing, and scope for service offerings.
 Software Component Model	Represents individual software components within an application. Enables modular architecture and dependency mapping.
 Software Model	Represents software product models for licensing and compliance. Tracks software lifecycle and usage rights.
 Software Product	Represents the actual software product offered or used. Links to software models and application architecture.
 Value Stream	Represents a sequence of activities delivering value to customers or stakeholders. Enables value-driven planning and optimization.
 Value Stream Category	Represents logical grouping of value streams under a common theme. Organizes streams for strategic alignment.
 Value Stream Stage	Represents a phase or stage within a value stream. Provides granularity for process improvement.

CSDM Ideation & Strategy shapes

Shape	Description
 Demand	A Demand represents a formal request or proposal for new work, enhancements, or initiatives that require resources and funding. Captures ideas or needs before they become projects or products.
 Goal	A Goal is a high-level business objective that an organization aims to achieve, typically linked to strategic priorities. Provides direction for planning and execution.
 Product Idea	A Product Idea is an initial concept for a new product or enhancement to an existing product. Captures innovation opportunities before formal development.

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CSDM Ideation & Strategy shapes (continued)

Shape	Description
Strategic Priority 	A Strategic Priority represents a key focus area or initiative that supports organizational strategy. Guides investment decisions and resource allocation.
Target 	A Target is a measurable outcome or milestone associated with a goal or strategic priority. Provides quantifiable benchmarks for success.
Service Portfolio 	A Service Portfolio is a collection of all services offered by the organization, including business and technical services. Provides visibility into available services and their lifecycle.

CSDM Design & Planning shapes

Shape	Description
AI Dataset Product Model 	Represents the product-level definition of datasets used for AI training and inference. Supports data governance and compliance in AI workflows.
AI Model Product Model 	Represents the product-level definition of an AI model, including its capabilities and supported use cases. Enables model cataloging and lifecycle tracking.
AI Prompt Product Model 	Represents the product-level definition of prompts used in generative AI systems. Captures reusable prompt templates for governance and standardization.
AI System Product Model 	Represents the product-level definition of an AI system that integrates models, datasets, and prompts to deliver AI capabilities. Provides a catalog entry for AI systems in EA.
Business Application 	A logical representation of an application that supports one or more business capabilities. Enables application portfolio management and rationalization.
Business Capability 	A high-level ability of an organization to achieve a specific business outcome, independent of organizational structure or technology. Forms the foundation of capability-based planning in EA. Links strategic goals to applications and services.
Information Object 	Represents a logical data artifact or entity that supports business processes and applications. It isn't a physical database but a conceptual representation of information.

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CSDM Design & Planning shapes (continued)

Shape	Description
	Helps architects model data flows and dependencies between applications and capabilities.

CSDM Build & Integration shapes

Shape	Description
AI Dataset Digital Asset 	Represents a collection of data used to train, validate, and test AI models. It includes metadata about the dataset such as source, type, and acceptable usage. Enables governance and traceability of datasets across AI lifecycle stages.
AI Model Digital Asset 	Represents the metadata and configuration of an AI model used by AI systems to generate outputs without human intervention. Tracks model lineage, parameters, and deployment guidelines.
AI Prompt Digital Asset 	Represents instructions or input prompts provided to AI models to generate responses or perform tasks. Captures prompt design for governance and reproducibility.
AI System Digital Asset 	Represents software artifacts that integrate AI models and datasets to deliver AI capabilities such as predictions, recommendations, or content generation. Serves as the deployable component in build and integration pipelines.
SDLC Component 	A configuration item representing a unique development effort of code within the software development lifecycle. It's part of the Build & Integration domain. Provides visibility into application development pipelines.

CSDM Service Delivery shapes

Shape	Description
AI Application 	Represents an application that leverages Artificial Intelligence or Machine Learning capabilities to deliver business or technical functionality. Used in EA diagrams to model AI-driven solutions such as predictive analytics, NLP engines, or chatbots.
AI Function 	A logical capability or feature within an AI Application, such as a specific algorithm or model. Helps architects break down AI applications into functional components for traceability.

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CSDM Service Delivery shapes (continued)

Shape	Description
API 	Represents an Application Programming Interface that enables integration between applications or services. Critical for modeling interoperability and service orchestration in EA.
Application 	A logical representation of a software application that supports business capabilities. Forms the backbone of application portfolio management in EA.
Application Service (Service Instance) 	A deployed instance of an application service that provides functionality to end-users or other systems. Represents the operational state of an application in production or other environments.
Computer 	A physical or virtual computing device that hosts applications or services. Models infrastructure components in EA diagrams.
Connection Service Instance 	A deployed instance of a logical or physical connection service, such as VPN or interconnect. Represents connectivity as a service in EA.
Data Service Instance 	A deployed instance of a service that provides data access or processing capabilities. Models data-centric services like analytics or storage.
Dynamic CI Group 	A logical grouping of Configuration Items based on dynamic query criteria. Used for impact analysis and operational grouping in EA.
Facility Service Instance 	Represents a deployed instance of a service associated with facility operations. Models building-related services like HVAC or security.
Network Service Instance 	A deployed instance of a network-related service. Represents network connectivity and routing services.
Operational Process Service Instance 	Represents a logical instance of an operational process service, often in industrial or utility contexts. Models services tied to manufacturing or operational workflows.
Operational Technology 	Hardware and software systems that monitor or control physical devices and processes. Used in EA to represent OT assets in manufacturing or industrial environments.

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CSDM Service Delivery shapes (continued)

Shape	Description
Server 	A physical or virtual machine that provides compute resources for applications and services. Core infrastructure element in EA diagrams.
Technology Management Service 	A technical service provided by IT to manage technology components (for example, network, database). Represents IT's provider view of technology services.
Technology Management Service Offering 	A specific variation or package of a Technology Management Service. Defines SLAs, pricing, and scope for technical services.

CSDM Service Consumption shapes

Shape	Description
Business Service 	A Business Service represents a service that delivers measurable value to the business. It's defined from the consumer's perspective and is typically visible in the service catalog. Serves as the top-level entity in the service hierarchy. Links business capabilities and processes to IT services and applications. Provides visibility into how IT supports business outcomes.
Business Service Offering 	A Business Service Offering is a specific variation or package of a Business Service. It defines the service commitments, such as availability, scope, pricing, and support levels. Provides granularity by breaking down a Business Service into consumable options.

Related topics

- CSDM shapes support in the Enterprise Modeling and Visualization
- Working with CSDM shapes
- Create a diagram using CSDM shapes

Enterprise Architecture shapes

Use the Enterprise Architecture shapes to create diagrams with icons related to enterprise architecture.

You can add a shape to the canvas by either selecting the shape or by dragging the shape from the **Shapes** palette to the canvas.

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Enterprise Architecture shapes in Enterprise Modeling and Visualization

Shape	Name
	Application
	Application Service
	Business Application
	Business Capability
	Business Process
	Business Service
	Business Unit
	Computer
	Demand
	Departments
	Digital Integration
	Digital Interface
	Dynamic CI Group
	Hardware Model
	Information Object
	SDLC Component
	Server
	Service Portfolio
	Software Product
	Technical Service
	Technical Service Offering
	Value Stream
	Value Stream Stage
	AI Dataset Digital Asset
	AI Model Digital Asset
	AI Prompt Digital Asset
	AI System Digital Asset

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Enterprise Architecture (EA) extended shapes

Use the Enterprise Architecture shapes to model current and future-state architectures in Enterprise Architecture Workspace.

EA Extended shapes in Enterprise Modeling and Visualization

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Note: Connector ports on EA Extended shapes are bi-directional. You can use any connector port—top, bottom, left, or right—as either an input or an output when connecting shapes in a diagram.

EA extended shapes

Shape name	Description
Control	Represents a specific safeguard or mechanism implemented to mitigate risk or ensure conformance with policies, standards, or regulations.Used in EA to model governance and conformance frameworks. Links to GRC (Governance, Risk, and Compliance) processes and associated risks.
Digital Integration	Represents a logical integration point between systems or applications, enabling data exchange and interoperability. Models integration architecture for APIs, middleware, and connectors. Supports visualization of system dependencies and data flows.
Digital Interface	Represents a user-facing or system-facing interface that enables interaction with applications or services. Captures UI/UX components or machine interfaces in EA diagrams. Links to applications and integration points for usability analysis.
GRC Risk	Represents a risk item identified within Governance, Risk, and Compliance processes, associated with business or IT operations. Enables risk modeling and impact analysis in EA. Links to controls, processes, and assets for mitigation planning.
Product Capability	Represents a specific functional capability offered by a product, and supporting business or technical needs. Helps architects map product features to business capabilities. Enables capability-based planning and product portfolio analysis.
TRM Product	A Technology Reference Model (TRM) Product represents a standardized technology

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EA extended shapes (continued)

Shape name	Description
	component or product category defined in the TRM framework. Provides a reference for technology standardization and conformance. Supports technology lifecycle and roadmap planning.

ArchiMate shapes

ArchiMate® shapes are industry-standard elements used by enterprise architects to create diagrams that represent relationships across different domains of an enterprise. These shapes are used to model the business, application, motivation, physical, strategy, and technology layers.

ArchiMate shapes in the Enterprise Modeling and Visualization

You can add a shape to the canvas by either selecting the shape or by dragging the shape from the **Shapes** palette to the canvas.

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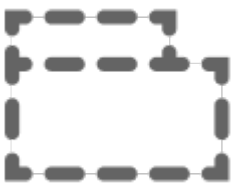
Note: : Connector ports on ArchiMate shapes are bi-directional. You can use any connector port—top, bottom, left, or right—as either an input or an output when connecting shapes in a diagram.

ArchiMate- Implementation and Migration

Shape	Name
	Implementation Event
	Gap

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ArchiMate- Implementation and Migration (continued)

Shape	Name
	Work Package
	Deliverable
	Plateau
	Location
	Group

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ArchiMate- Relationship Type

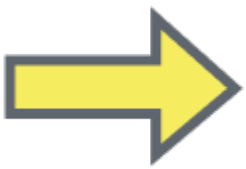
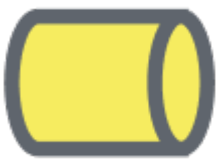
Shape	Name
	And Junction
	Or Junction

ArchiMate- Business layer

Shape	Name
	Business Actor
	Business Collaboration
	Business Event

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ArchiMate- Business layer (continued)

Shape	Name
	Business Function
	Business Interaction
	Business Interface
	Business Object
	Business Process
	Business Role

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ArchiMate- Business layer (continued)

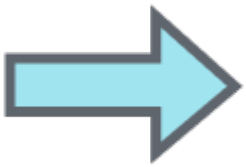
Shape	Name
	Business Service
	Contract
	Product
	Representation

ArchiMate- Application layer

Shape	Name
	Application Collaboration

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ArchiMate- Application layer (continued)

Shape	Name
	Application Component
	Application Event
	Application Function
	Application Interaction
	Application Interface
	Application Process

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ArchiMate- Application layer (continued)

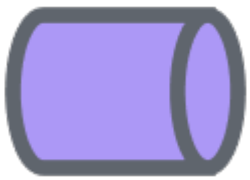
Shape	Name
	Application Service
	Data Object

ArchiMate- Motivation

Shape	Name
	Assessment
	Constraint
	Driver

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ArchiMate- Motivation (continued)

Shape	Name
	Goal
	Meaning
	Outcome
	Principle
	Requirement
	Stakeholder

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ArchiMate- Motivation (continued)

Shape	Name
	Value

ArchiMate- Physical

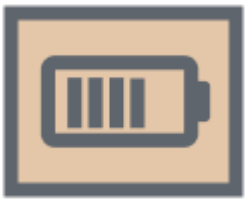
Shape	Name
	Equipment
	Facility
	Material

ArchiMate- Strategy

Shape	Name
	Capability

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ArchiMate- Strategy (continued)

Shape	Name
	Course of Action
	Resource
	Value Stream

ArchiMate- Technology

Shape	Name
	Artifact
	Communication Network

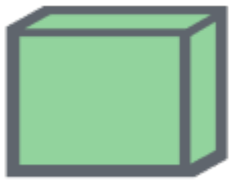
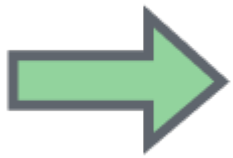
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ArchiMate- Technology (continued)

Shape	Name
	Communication Path
	Device
	Infrastructure Function
	Infrastructure Interface
	Technology Service
	Network Box

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ArchiMate- Technology (continued)

Shape	Name
	Node
	System Software
	Technology Collaboration
	Technology Event
	Technology Interaction
	Technology Process

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Related topics

- Shape connector properties in Enterprise Modeling and Visualization
- Working with ArchiMate Shapes
- Create diagram using ArchiMate shapes and add relationships

Business Process Modeling Notation (BPMN) shapes

Use the BPMN shapes to generate diagrams for your current business processes and model the future state of the business processes.

BPMN shapes in Enterprise Modeling and Visualization

You can add a shape to the canvas by either selecting the shape or by dragging the shape from the **Shapes** palette to the canvas.

You can also adjust the size of shapes by selecting a shape and then drag any of its edges or corner handles. Pulling outward increases the shape's dimensions, while dragging inward reduces its size. However, BPMN-Event shapes can’t be resized.

When you drag a BPMN shape from the **Shapes** palette to the canvas, the shape icon you drag matches the shape's appearance on the canvas. This helps you confirm the correct shape before placing it on the canvas.

BPMN shapes are organized into sub-categories in the **Shapes** palette: **Event**, **Activity**, **Gateway**, and **General**. Expand a sub-category to see and add its shapes.

BPMN: General shapes

BPMN: General

Shape	Name
	Pool
	Lane

BPMN-Event shapes

Event shapes represent something that happens during a process. Events are categorized by their position in the process flow — start, intermediate, or end — and by the trigger type that causes or results from the event. Boundary events are attached to an activity shape and fire when a specific condition occurs while the activity is running. BPMN-Event shapes cannot be resized.

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BPMN-Event

Shape	Name
	Start (Compensation)
	Start (Error)
	Start (Escalation)
	Start Interrupting Conditional
	Start Interrupting Message
	Start Interrupting Signal
	Start Interrupting Timer
	Start (Multiple)

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BPMN-Event (continued)

Shape	Name
	Start (Non-Interrupting Condition)
	Start (Non-Interrupting Escalation)
	Start (Non-Interrupting Message)
	Start (Non-Interrupting Multiple)
	Start (Non-Interrupting Parallel Multiple)
	Start (Non-Interrupting Signal)
	Start (Non-Interrupting Timer)
	Start (None)

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BPMN-Event (continued)

Shape	Name
	Start (Parallel Multiple)
	Intermediate (Catch-Cancel)
	Intermediate (Catch-Compensation)
	Intermediate (Catch-Conditional)
	Intermediate (Catch-Error)
	Intermediate (Catch-Escalation)
	Intermediate (Catch-Message)
	Intermediate (Catch-Multiple)

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BPMN-Event (continued)

Shape	Name
	Intermediate (Catch-Non-Interrupting Condition)
	Intermediate (Catch-Non-Interrupting Escalation)
	Intermediate (Catch-Non-Interrupting Message)
	Intermediate (Catch-Non-Interrupting Multiple)
	Intermediate (Catch-Non-Interrupting Parallel Multiple)
	Intermediate (Catch-Non-Interrupting Parallel Multiple)
	Intermediate (Catch-Non-Interrupting Timer)
	Intermediate (Catch-Parallel Multiple)

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BPMN-Event (continued)

Shape	Name
	Intermediate (Catch-Signal)
	Intermediate (Catch-Timer)
	Intermediate (Link-Catch)
	Intermediate (None)
	Intermediate (Throw-Compensation)
	Intermediate (Throw-Escalation)
	Intermediate (Throw-Link)
	Intermediate (Throw-Message)

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BPMN-Event (continued)

Shape	Name
	Intermediate (Throw-Multiple)
	Intermediate (Throw-Signal)
	Cancellation End
	Compensation End
	End (Link)
	End (None)
	End Error
	End Message

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BPMN-Event (continued)

Shape	Name
	End Signal
	End Terminate
	Escalation End
	Multiple End

BPMN-Activity shapes

Activity shapes represent work performed within a process. Activities are divided into tasks, which are atomic units of work, and sub-processes and call activities, which reference other process flows. You can also apply a marker to any task shape to indicate how the activity executes — for example, whether it loops or runs in parallel.

BPMN-Activity: Task

Shape	Name
	Business Rule Task
	Manual Task

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BPMN-Activity: Task (continued)

Shape	Name
	Receive Task
	Script Task
	Send Task
	Service Task
	Task
	User Task

BPMN-Activity: Sub-Process

Shape	Name
	Business Rule Call Activity
	Call Activity
	Manual Call Activity

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BPMN-Activity: Sub-Process (continued)

Shape	Name
	Script Call Activity
	User Call Activity
	Sub-Process
	Adhoc Sub-Process
	Transaction Sub-Process

BPMN-Activity: Marker

Shape	Name
	Loop - Business Rule Task
	Loop - Manual Task
	Loop - Receive Task
	Loop - Script Task
	Loop - Send Task

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BPMN-Activity: Marker (continued)

Shape	Name
	Loop - Service Task
	Loop - Task
	Loop - User Task
	Multi Instance Parallel - Business Rule Task
	Multi Instance Parallel - Manual Task
	Multi Instance Parallel - Receive Task
	Multi Instance Parallel - Script Task
	Multi Instance Parallel - Send Task

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BPMN-Activity: Marker (continued)

Shape	Name
	Multi Instance Parallel - Service Task
	Multi Instance Parallel - Task
	Multi Instance Parallel - User Task
	Multi Instance Sequential - Business Rule Task
	Multi Instance Sequential - Manual Task
	Multi Instance Sequential - Receive Task
	Multi Instance Sequential - Script Task
	Multi Instance Sequential - Send Task

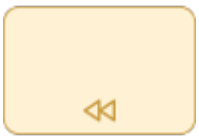
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BPMN-Activity: Marker (continued)

Shape	Name
	Multi Instance Sequential - Service Task
	Multi Instance Sequential - Task
	Multi Instance Sequential - User Task
	Compensation - Business Rule Task
	Compensation - Manual Task
	Compensation - Receive Task
	Compensation - Script Task
	Compensation - Send Task

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BPMN-Activity: Marker (continued)

Shape	Name
	Compensation - Service Task
	Compensation - Task
	Compensation - User Task
	Loop & Compensation - Business Rule Task
	Loop & Compensation - Manual Task
	Loop & Compensation - Receive Task
	Loop & Compensation - Script Task
	Loop & Compensation - Send Task

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BPMN-Activity: Marker (continued)

Shape	Name
	Loop & Compensation - Service Task
	Loop & Compensation - Task
	Loop & Compensation - User Task

BPMN-Gateway shapes

Gateway shapes control how the process flow splits and merges. Gateways can be resized on the canvas.

BPMN-Gateway: Core

Shape	Name
	Complex
	Default
	Event
	Event Based (Start)
	Exclusive
	Inclusive
	Parallel

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BPMN-Gateway: Core (continued)

Shape	Name

BPMN-Gateway: Event Based

Shape	Name
	Cancel (End)
	Cancel Boundary (Interrupting)
	Compensation (End)
	Compensation (Interrupting)
	Compensation (Throwing)
	Compensation Boundary (Interrupting)
	Conditional

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BPMN-Gateway: Event Based (continued)

Shape	Name
	Conditional (Catching)
	Conditional (Interrupting)
	Conditional (Non-Interrupting)
	Conditional Boundary (Interrupting)
	Conditional Boundary (Non-Interrupting)
	End
	Error (End)
	Error (Interrupting)

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BPMN-Gateway: Event Based (continued)

Shape	Name
	Error Boundary (Interrupting)
	Escalation (End)
	Escalation (Interrupting)
	Escalation (Non-Interrupting)
	Escalation (Throwing)
	Escalation Boundary (Interrupting)
	Escalation Boundary (Non-Interrupting)
	Intermediate

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BPMN-Gateway: Event Based (continued)

Shape	Name
	Link (Catching)
	Link (Throwing)
	Message
	Message (Catching)
	Message (End)
	Message (Interrupting)
	Message (Non-Interrupting)
	Message (Throwing)

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BPMN-Gateway: Event Based (continued)

Shape	Name
	Message Boundary (Interrupting)
	Message Boundary (Non-Interrupting)
	Multiple
	Multiple (Catching)
	Multiple (End)
	Multiple (Interrupting)
	Multiple (Non-Interrupting)
	Multiple (Start)

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BPMN-Gateway: Event Based (continued)

Shape	Name
	Multiple (Throwing)
	Multiple Boundary (Interrupting)
	Multiple Boundary (Non-Interrupting)
	Parallel Multiple
	Parallel Multiple (Catching)
	Parallel Multiple (Interrupting)
	Parallel Multiple (Non-Interrupting)
	Parallel Multiple Boundary (Interrupting)

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BPMN-Gateway: Event Based (continued)

Shape	Name
	Parallel Multiple Boundary (Non-Interrupting)
	Signal
	Signal (Catching)
	Signal (End)
	Signal (Interrupting)
	Signal (Non-Interrupting)
	Signal (Throwing)
	Signal Boundary (Interrupting)

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BPMN-Gateway: Event Based (continued)

Shape	Name
	Signal Boundary (Non-Interrupting)
	Start
	Terminate
	Timer
	Timer (Catching)
	Timer (Interrupting)
	Timer (Non-Interrupting)
	Timer Boundary (Interrupting)

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BPMN-Gateway: Event Based (continued)

Shape	Name
	Timer Boundary (Non-Interrupting)

BPMN: General

Shape	Name
	Pool
	Lane

Shape connector properties in Enterprise Modeling and Visualization

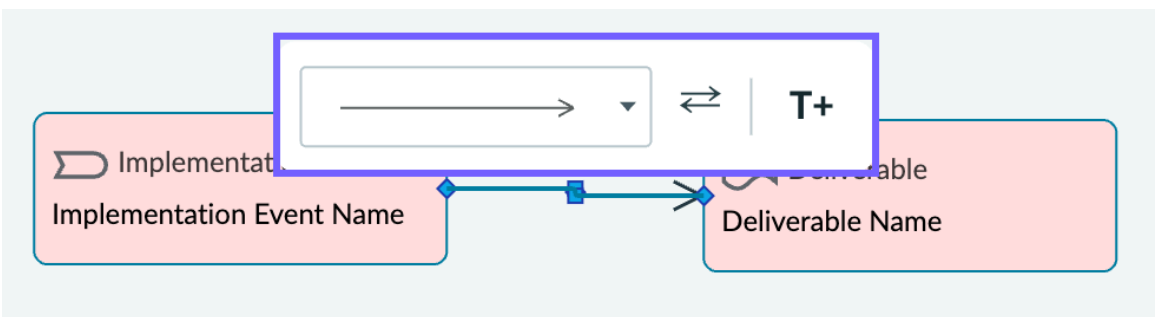
When you select a connector between two shapes in an enterprise modeling diagram, a toolbar appears above the connector. Use the toolbar to define the relationship type or visual style of the connector.

The toolbar has two forms depending on the notation of the connected shapes. You can also add a label to a connector to clarify the relationship between shapes, annotate the data flow direction, or provide contextual information.

ArchiMate connectors

When both connected shapes are ArchiMate shapes, the toolbar shows the following controls:

Control	Description
Relationship type	Sets the ArchiMate relationship type from a predefined list.
Swap direction	Reverses the connector orientation, switching the left and right sides.
T+	Adds a text label to the connector.



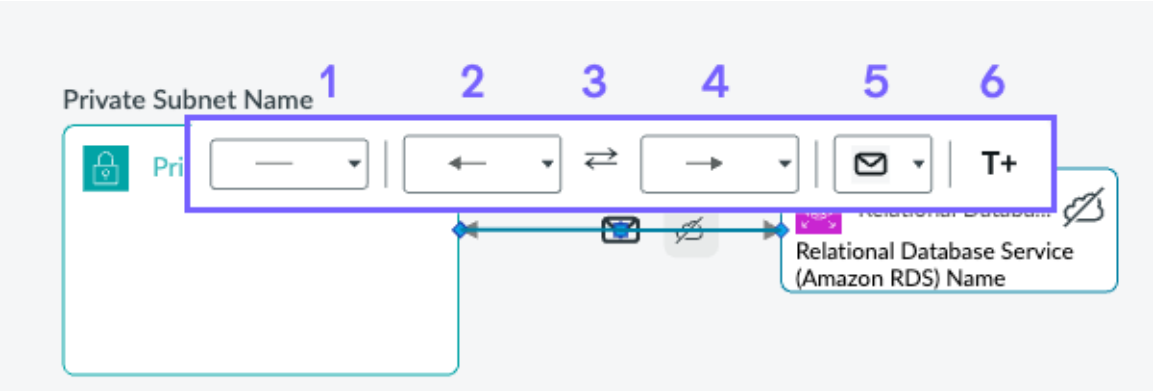
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The **Relationship type** drop-down provides the standard ArchiMate 3.2 relationship types, including Access, Aggregation, Assignment, Association, Composition, Flow, Influence, Realization, Serving, Specialization, Triggering, and Used by.

The **Access** relationship type is available in three variants: single-direction, bidirectional, and unspecified (dotted). The Association relationship type is available in two variants: directed and undirected.

Non-ArchiMate and mixed connectors

The toolbar shows the following controls when at least one connected shape is a non-ArchiMate shape (for example, a CSDM or AWS shape). The toolbar also shows these controls when connecting shapes from two different notations.



Number	Control	Description
1	**Line style**	Sets the connector line to solid, dashed, or dotted.
2	**Start arrow**	Sets the arrowhead style at the starting end of the connector.
3	**Swap direction**	Reverses the connector orientation, switching the left and right sides.
4	**End arrow**	Sets the arrowhead style at the ending end of the connector.
5	**Icon**	Adds a BPMN message flow decorator icon to the connector.
6	**T+**	Adds a text label to the connector.

Related topics

- Set shape connector properties in Enterprise Modeling and Visualization
- Create a blank diagram using modeling in the EA Workspace
- Working with ArchiMate Shapes
- Working with CSDM shapes
- Working with custom shapes

ArchiMate shapes support in the Enterprise Modeling and Visualization

ArchiMate® shapes are industry-standard elements used by enterprise architects to create diagrams that represent relationships across different domains of an enterprise. ArchiMate is

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a registered trademark of The Open Group. Enterprise Modeling and Visualization supports ArchiMate shapes along with General and Enterprise Architecture shapes.

ArchiMate shapes mapping with ServiceNow Common Service Data Model (CSDM)

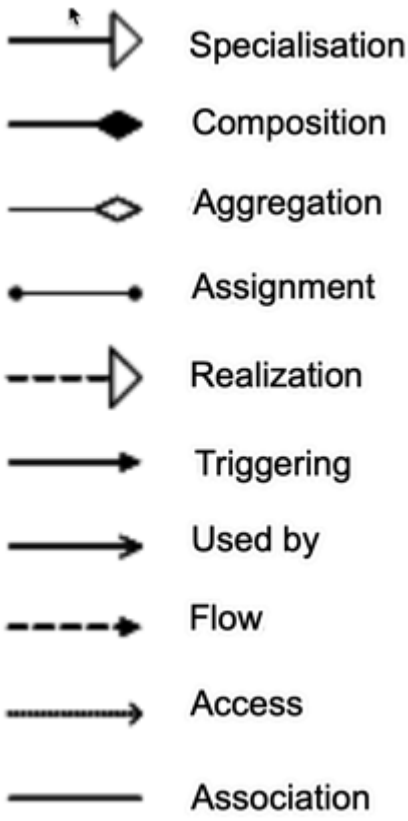
ArchiMate shapes are internally associated with the ServiceNow CSDM elements. This mapping allows you to follow similar mapping of the Enterprise Architecture shapes relationships.

ArchiMate shape	CSDM element type
Business Service	Business Service
Application Service	Application Service
Application Component	Business Application
Product	Business Application
Artifact	Architectural Artifact
Capability	Business Capability
Business Process	Business Process
Technology Collaboration	Dynamic CI Group
Node	Server
Data Object	Information Object
Contract	Contract
Location	Location
Application Interface	Digital Interface

Types of ArchiMate relationships

Following are the relationship types for the ArchiMate shapes. Use these arrows to define the relationship between the ArchiMate shapes in a modeling diagram.

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Related topics

ArchiMate shapes

Create diagram using ArchiMate shapes and add relationships

AWS shapes support in the Enterprise Modeling and Visualization

Enterprise Modeling and Visualization supports Amazon Web Services (AWS) shape libraries for modeling cloud architectures. These shapes enable architects to design future-state cloud diagrams aligned with CMDB and CSDM standards.

AWS shapes mapping with ServiceNow Common Service Data Model (CSDM)

Mapping AWS shapes to ServiceNow CMDB and Common Service Data Model (CSDM) ensures:

- Operationalization of cloud diagrams: AWS architecture diagrams in EA Workspace can directly link to CMDB records.
- Governance and compliance: Aligns AWS resources with workflows for approvals and audits.
- End-to-end traceability: Connects AWS infrastructure to business capabilities and applications in CSDM.

AWS shapes to CSDM layers mapping

AWS shape	CSDM mapped entity
AWS Account	Cloud Service Account
Region or Availability Zone	AWS Datacenter
Amazon VPC	Network Service CI

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AWS shapes to CSDM layers mapping (continued)

AWS shape	CSDM mapped entity
EC2 Instance	Virtual Machine Instance
Auto Scaling Group	Compute Cluster CI
Amazon S3	Cloud Object Storage
RDS Instance	Cloud Database
Lambda Function	Cloud Function
API Gateway	Application Gateway CI
Security Group / NACL	Security Policy CI

Related topics

- Amazon Web Services (AWS) shapes
- Working with Amazon Web Services (AWS) shapes
- Create a diagram using AWS shapes

CSDM shapes support in the Enterprise Modeling and Visualization

ServiceNow CSDM data model defines standardized relationships between service-related objects in the CMDB. It ensures consistency across ITSM, ITOM, and EA practices. In Enterprise Architecture Workspace, CSDM shapes represent these objects visually in diagrams, enabling architects to model business capabilities, applications, services, and technical components in alignment with the Now Platform.

CSDM domains and shapes

CSDM 5 introduces seven domains, each grouping related entities. Shapes in Enterprise Architecture Workspace diagrams correspond to these domains:

- Foundation- Shapes in this domain represent core referential data like Company, Location, Groups, Products, and Contracts.
- Ideation & Strategy- Shapes in this domain capture early-stage planning and strategic objectives.
- Design & Planning- Shapes in this domain define an architecture blueprint and logical application portfolio.
- Build & Integration- Shapes in this domain represent development artifacts and integration points.
- Service Delivery- Shapes in this domain represent an operational view of technology services and offerings.
- Service Consumption- Shapes in this domain represent services consumed by end users.

Enterprise Architecture Shapes mapping to CSDM Domain, Purpose, and Example

Shape	Domain	Purpose	Example
Value Stream	Foundation	Represents a sequence of activities	Customer Onboarding Value Stream

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Enterprise Architecture Shapes mapping to CSDM Domain, Purpose, and Example (continued)

Shape	Domain	Purpose	Example
		delivering business value	
Value Stream Stage	Foundation	Defines phases within a value stream for process improvement	Payment Processing Stage
Business Process	Design & Planning	Models operational workflows supporting business capabilities	Order-to-Cash Process
Contract Model	Foundation	Standardizes contractual agreements and compliance tracking	Software Licensing Agreement Template
Application Model	Foundation	Catalog entry for an application, including lifecycle and components	SAP ERP Application Model
Business Capability	Design & Planning	High-level ability enabling business outcomes	Customer Relationship Management Capability
Business Application	Design & Planning	Logical representation of an application supporting capabilities	Salesforce CRM
Information Object	Design & Planning	Conceptual representation of data artifacts	Customer Profile
Portfolio	Build & Integration	Groups services or products for investment and lifecycle management	IT Service Portfolio
Service Offering	Build & Integration	Defines variations or tiers of a service	Gold Tier Support Offering
Service Instance	Build & Integration	Represents deployed instance of a service	Payroll Application Service – Production
Technology Management Service	Build & Integration	Technical service provided by IT for managing technology components	Database Management Service
Technology Management Service Offering	Build & Integration	Specific variation of a technical service	24x7 Network Monitoring Offering
Business Service	Service Delivery	Customer-facing service delivering	Employee Onboarding Service

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Enterprise Architecture Shapes mapping to CSDM Domain, Purpose, and Example (continued)

Shape	Domain	Purpose	Example
		measurable business value	
Customer-Facing Service	Service Delivery	Service consumed directly by external customers	Online Banking Service

AI & Digital Asset Shapes

Shape	Domain	Purpose	Example
AI Dataset Digital Asset	Build & Integration	Represents datasets used for AI training and inference	Customer Interaction Dataset
AI Model Digital Asset	Build & Integration	Represents AI models with metadata and lifecycle details	Large Language Model for HR Chatbot
AI Prompt Digital Asset	Build & Integration	Represents reusable prompts for generative AI	Incident Resolution Prompt
AI System Digital Asset	Build & Integration	Represents deployable AI systems integrating models and datasets	AI Recommendation Engine

Product Models

Shape	Domain	Purpose	Example
AI System Product Model	Foundation	Catalog entry for AI systems at product level	Conversational AI Platform
AI Model Product Model	Foundation	Defines AI model product specifications	Image Classification Model
AI Prompt Product Model	Foundation	Captures reusable prompt templates for governance	Customer Query Summarization Prompt
AI Dataset Product Model	Foundation	Defines dataset product specifications	Product Image Dataset
Software Component Model	Foundation	Represents modular software components	Authentication Module
Software Model	Foundation	Represents software product models for licensing and compliance	Windows 11 Enterprise Model

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Product Models (continued)

Shape	Domain	Purpose	Example
Software Product	Foundation	Represents actual software product offered or used	Microsoft Office Suite
Product Feature	Foundation	Represents specific capability or function of a product	Multi-factor Authentication feature

Related topics

- Common Service Data Model (CSDM) shapes

Custom shapes support in the Enterprise Modeling and Visualization

Custom shapes are the user-defined graphical elements that can be used to represent specific concepts, processes, systems, or roles in your diagrams. These shapes can be tailored to fit the unique needs of your organization, making your diagrams more meaningful and easier to understand.

Usage of custom shapes in the Enterprise Modeling and Visualization

Custom shapes can represent specific elements that are unique to your organization, such as custom business processes, systems, or roles.

Using custom shapes in the Enterprise Modeling and Visualization ensures that your diagrams maintain a consistent look and feel. Custom shapes can help communicate complex ideas more effectively by using familiar and meaningful symbols.

Related topics

- Storing shapes or images to the database
- Create a diagram action for a custom shape
- Add a custom shape library
- Add a shape library element for a custom shape
- Custom shapes example

Business process modeling

Business processes are a structured sequence of tasks that are grouped, helping to accomplish specific business outcomes. A business process modeling diagram or a BPMN (Business Process Model and Notation) diagram is a visual representation of a business process.

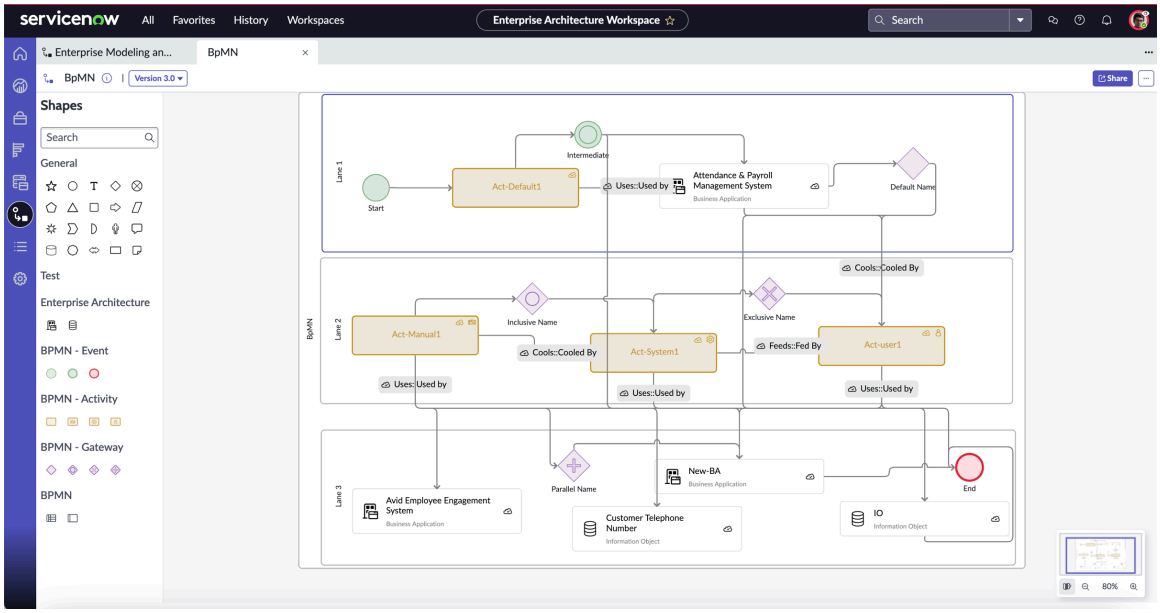
The business process modeling diagram shows how a business process operates. It helps to have a common understanding of the processes, and identify areas for optimization.

Elements that are included in a business process modeling diagram: A business process modeling diagram includes the following elements:

- Pools: Different participants or departments involved in the process.
- Lanes: Subdivisions within pools that show the specific roles or responsibilities of each participant.
- Events: Indicate points in the process where something happens. Events are categorized by position — start, intermediate, end, and boundary — and by the type of trigger, such as message, timer, signal, or error. Common symbols used are circles.

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- Activities: Tasks or actions within the process. Activity types include tasks (such as user tasks, service tasks, and script tasks), sub-processes, and call activities. Common symbols used are rectangles.
- Gateways: Decision points and branching paths. Common symbols used are diamonds.



Related topics

Create a diagram for a business process map

Update a business process map

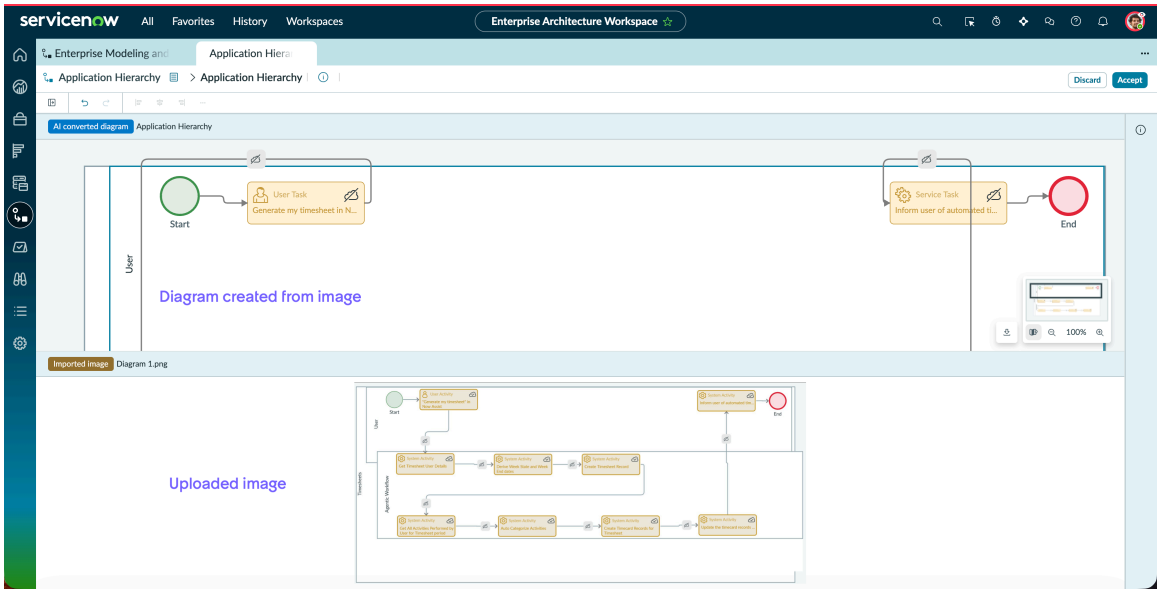
Business process map diagrams from images

Use the ServiceNow AI lens skill to generate a business process map (BPM) diagram automatically by uploading an image of an existing process diagram from any tool.

Note: Depending on your license, you will have access to certain application features, generative AI skills, agentic workflows, and AI agents. For more information, see ServiceNow product tiers.

Important: This generative AI skill is turned on by default. The skill will be automatically available to appropriate role users for the application. For more information, see AI agents, skills, and agentic workflows on by default.

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The image-to-diagram feature in EA Workspace uses the ServiceNow AI Lens platform ServiceNow Otto® skill to analyze an uploaded image of a business process. It re-creates the process as a native, editable BPM diagram. This removes the need to manually rebuild diagrams that already exist in other tools.

When you upload an image, AI Lens identifies shapes, pools, lanes, gateways, and the connections between them. It maps recognized shapes to entities in your instance where matching records exist, and creates new records for shapes it can't find a match for, provided you have the appropriate permissions for the tables associated with those shapes. The generated diagram opens in a review state so you can validate, adjust, and then commit it.

Note: Image upload is available only when creating a business process map diagram. The **Import image** option is not shown for blank, business application hierarchy, or business capability map diagram types.

In review state

An AI-generated diagram remains in Review state until you accept or discard it. While in this state:

- The canvas header displays an **AI converted diagram** badge.
- The **Share** button, **Show Version**, and the more actions menu are hidden until the diagram is accepted.
- The canvas is fully editable: you can move, resize, add, or remove shapes, change any shape type, or replace a shape with a different shape.

Selecting **Accept All** transitions the diagram to draft state and closes the reference image pane. New records staged during diagram generation are committed following the standard approval workflow for the respective tables. Selecting **Discard** permanently deletes the diagram, all associated versions, the artifact, and the uploaded image, and returns you to the diagrams list view.

Important: Discarding is permanent and cannot be undone.

Canvas layout in review state

After the diagram is generated, the canvas is divided into two panes:

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- The upper pane displays the generated diagram with all identified shapes, connections, pools, and lanes.
- The lower pane displays the uploaded source image for reference.

Move the cursor over the divider between the two panes to reveal the **Adjust Pane** control. Drag the divider to resize either pane without overlap. After the diagram is accepted or discarded, the reference image pane closes and the canvas occupies the full area.

The shapes panel on the left is collapsed by default. Select the toggle to expand it and add shapes manually to the canvas.

How AI Lens generates the diagram

ServiceNow AI Lens processes the uploaded image and performs the following actions:

- Shape identification: AI Lens identifies BPMN shapes such as tasks, sub-processes, gateways, events, pools, and lanes. Shapes in the image that have no equivalent in the EA Workspace shape library are substituted with a generic rectangle on the canvas.
- Grouping: Shapes that appear in a grouped arrangement in the source image are also grouped in the generated diagram.
- Edge and label detection: AI Lens detects connections between shapes and any labels on those connections.
- Entity sync: For each identified shape, AI Lens checks whether a matching record exists in the corresponding table. If a match is found, the shape is linked to that record automatically. If no match is found, a temporary record is staged for the shape, provided you have the appropriate permissions for the tables associated with those shapes. If you don't have the required permissions, records aren't created for the corresponding shapes.

The uploaded image is stored as an attachment on the architectural artifact record.

Replacing shapes and updating linked entities

You can replace any shape on the canvas with a different shape type, or update the record a shape is linked to without changing the shape type. Select the shape to open its data panel on the canvas.

- To change the shape type, select the **Shape Type** list and choose the correct type from the list. All existing connections and their labels are preserved after replacement.
- To update the linked record without changing the shape type, use the **Choose Existing** or **Create** options in the **Data** panel to re-link the shape to a different record.

After a low-confidence shape is replaced, its orange border is removed and the low-confidence count in the canvas banner is reduced.

Required ServiceNow Otto skills

The image-to-diagram feature requires two ServiceNow Otto skills to be active: the **Create diagram from image** ServiceNow Otto for Enterprise Architecture (EA) skill, and the ServiceNow AI Lens skill for the platform. When either skill is inactive, the **Import image** button is hidden on the Diagrams page.

Create diagram from image (EA)

Available under **Technology** > **EA** in AI Admin Hub. This skill is active by default. To verify or reactivate, navigate to *AI Admin Hub* > **AI Skills**, expand **Technology**,

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and select **EA**. Confirm the **Create diagram from image** skill card shows **Active** status. If inactive, select **Activate skill** on the skill card. For configuration details, see Configure ServiceNow Otto for Enterprise Architecture (EA).

ServiceNow AI Lens (Platform)

Available under **Platform** > **Other** in AI Admin Hub. This skill must be activated by an administrator. AI Lens supports three AI model providers: Google Gemini, Azure OpenAI, and AWS Claude. The active provider is configured at the instance level under *AI Admin Hub* > **Settings** > **Manage AI models** > **Manage model providers**. For more information, see ServiceNow AI Lens and Configure ServiceNow AI Lens.

Related topics

Create a business process map diagram from an image

Review an AI-generated business process map diagram

Exploring ServiceNow Otto for Enterprise Architecture (EA)

Configure ServiceNow Otto for Enterprise Architecture (EA)

ServiceNow AI Lens

Configure ServiceNow AI Lens

Exploring digital integration management in Enterprise Architecture Workspace

Exploring digital integration management in Enterprise Architecture Workspace.

Digital Integration Management in Enterprise Architecture Workspace enables you to effectively model integrations and their related business applications to uncover insights and drive business value.

The digital integration represents the integration between two business applications. In a typical scenario there would be a consuming business application, a provider business application, and an interface that is provided by the provider business application. The digital integration contains the metadata on the integration, including name, version, type, data flow direction, middleware used, owners, and so on.

- Digital Integration:
  - Represents details of the integration between two applications.
  - Consists of a providing business application, an interface from the providing application, and is consumed by another business application.
- Digital Interface:
  - Defined by the providing business application.
  - Outlines a business application model for interacting with another application (frequently an API).

https://player.vimeo.com/video/1183008183?h=8be9a647b3&badge=0&autopause=0&player_id=0&app_id=58479

Exploring product capabilities

A product capability is the specific feature that a business application or a Technology Reference Model (TRM) product provides to support business objectives. Product capabilities are used

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to assess how well a business application or TRM product aligns with strategic goals and operational needs.

Product capabilities help in understanding what a business application or a TRM product can technically deliver.

Product capabilities and business capabilities are related but distinct concepts:

- Business capabilities describe what an organization needs to do to achieve its strategic objectives — for example, "Workforce conformance management."
- Product capabilities describe how a specific business application or TRM product fulfills those needs — for example, "conformance reporting" in a payroll management application.

You can use product capabilities to assess how well a business application or TRM product supports your organization's business capabilities and strategic goals.

Example: Product capability vs. Business capability

An organization has a business capability called Workforce conformance management — the organizational requirement to manage employee attendance, leave, and payroll in line with legal requirements.

To fulfill this business capability, the organization uses an attendance and payroll management business application. The product capabilities of this application include:

- Payroll calculation: Computes salary based on attendance, leaves taken, and applicable tax laws.
- conformance reporting: Generates reports for tax and labor law conformance.

Related topics

Working with product capabilities

View product capabilities for a business application

Associate a product capability with a business application

Manage business capabilities

Add an existing product capability to a business application

View product capabilities associated with a Technology Reference Model product

Create product capabilities and associate it with a Technology Reference Model product

Add an existing product capability to a Technology Reference Model product

Remove product capabilities from a TRM product

Open a Configurable Workspace experience in UI Builder

Access your Configurable Workspace experience in UI Builder for editing.

Before you begin

Role required: ui_builder_admin or admin

Procedure

1. In the navigation filter, navigate to **All** > **Now Experience Framework** > **UI Builder**.
2. Select your experience.
3. Select **Experiences**.

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Result
Your configurable experience opens in UI Builder.

List of workspaces reference conkeyrefs

List of all workspaces ServiceNow offers to target specific users and issues.

A workspace is a suite of tools that provides agents, case managers, help desk professionals, and managers with tools to help answer customer questions and resolve customer problems. ServiceNow provides many workspaces, each targeted to a specific user and issue.

List of workspaces

Workspace

Workspace acts as the default workspace available on the ServiceNow AI Platform and provides the foundation for the targeted workspaces ServiceNow offers.

Audit Workspace

Audit workspace is a single-pane view for audit supervisors and auditors. View the overall audit timeline and status, track budget and resources for engagements, and trace high priority observations and issues. Monitor ongoing control testing and audit task progress.

Cloud Discovery Workspace

Cloud Discovery Workspace offers a comprehensive solution to manage the cloud operations of your organization.

CMDB Workspace

CMDB Workspace is an efficient, central, and modernized way for you to work. Use CMDB Workspace to search and explore the CMDB, examine health and recent activity, and access various CMDB dashboards and tools to support tasks in your organization.

Compliance Workspace

Compliance Workspace is a unified interface where you can manage all your tasks related to policies, control objectives, controls, issues, and policy exceptions.

Continuous Authorization and Monitoring

Continuous Authorization and Monitoring employs the seven steps defined by the Risk Management Framework (RMF) to allow you to make better-informed decisions about your security posture.

CSM Configurable Workspace

CSM Configurable Workspace is a user interface that provides agents with the tools they need to answer customer questions and resolve customer issues.

Digital Portfolio Management Workspace

Manage and maintain all your solutions (services, service offerings, business applications, and application services) from a single location using the ServiceNow Digital Portfolio Management (DPM) Workspace. DPM pulls in data from across the ServiceNow platform so you see impacts in the context of solutions that you own or care about.

Enterprise Architecture Workspace

The Enterprise Architecture Workspace is part of the Application Portfolio Management (APM) application. The workspace is a unified interface with multiple views that help you manage your portfolio efficiently. You can use these views to stay up to date with your tasks, insights, tasks that need attention, portfolio health, and dashboards.

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Platform Analytics Workspace

Platform Analytics Workspace provides an Analytics Center for managing all Next Experience analytics.

Resource Management Workspace

Resource Management Workspace helps Resource Managers have a centralized view of all work across all resources.

Service Operations Workspace for ITSM

Service Operations Workspace is a configurable workspace that provides a unified experience for multiple IT Service Management and IT Operations Management workflows. Configure your agent experience using the easy-to-navigate interface of Service Operations Workspace for ITSM.

Service Operations Workspace for ITOM

Service Operations Workspace is a configurable workspace that provides a unified experience for multiple IT Operations Management workflows. Configure your experience using the easy-to-navigate interface of Service Operations Workspace.

Workforce Optimization for ITSM

Manage and maintain the productivity of your workforce from a single location using Workforce Optimization for ITSM. Using this application, you can efficiently manage your team's skills and schedules, route work assignments to your team, and monitor their performance.

Exploring the publishing center in Enterprise Architecture Workspace

The Publishing Center is a centralized capability in the Enterprise Architecture Workspace. It helps you configure, manage, and track publishing activities from a single location.

Publishing Center Overview

The Publishing Center provides a structured, repeatable way to publish curated EA content to broader audiences.

Use the Publishing Center for:

- Centralize publishing workflows- instead of managing ad-hoc or manual publishing processes.
- Ensure consistency and governance- by controlling what content is published and how.
- Increase visibility and adoption- following enterprise standards by publishing them to consumable platforms.
- Track publishing activity and outcomes- through status and historical run logs.

Understanding the terminology used in Publishing Center:

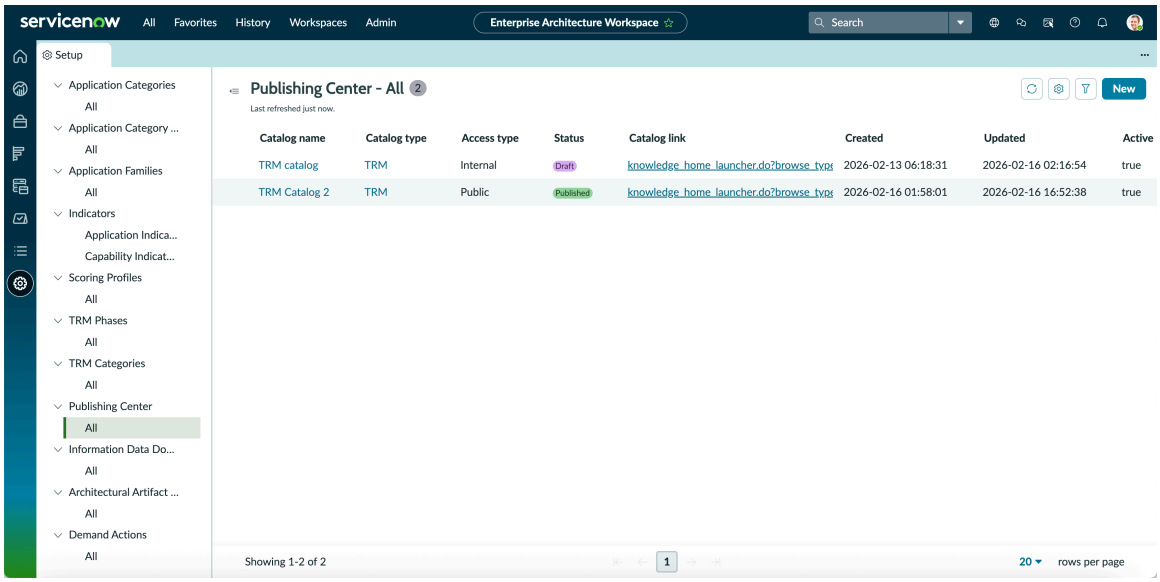
- Publishing Configuration– defines the information that is published to the knowledge base.
- Knowledge Base – from where the published catalogs are consumed.

The Publishing Center displays a list of all available publishing configurations. Each row represents a catalog that can be published or republished.

Publishing status and indicators- Each publishing configuration displays a status that reflects its current publishing state. Status values are visually indicated using color-coded badges. Use the status indicators to quickly understand the publishing state of each catalog. The following are the status indicators:

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- Draft– The configuration is ready to publish or has unpublished changes after edits.
- Publishing– A publish or republish operation is currently in progress.
- Published– The catalog has been successfully published to the Knowledge Base.
- Publishing failed– The publishing operation failed and requires attention.



Required plugin

To use this feature in the Enterprise Architecture Workspace, you must install the Knowledge Management Advanced Installer [com.snc.knowledge_advanced.installer] plugin. For more information, see Activate the Knowledge Management Advanced plugin. Activating this plugin activates the features such as article versioning, article subscriptions, and article templates.

Note: Starting with the Xanadu release, the Knowledge Management Advanced plugin is automatically activated for new customers. If you are upgrading from a previous version, you must activate the plugin manually.

Roles and permissions required for publishing

While many users consume the published content, the ability to publish or republish knowledge base content is controlled to ensure only authorized users can change what is shared organization-wide. The following are the required roles:

- Enterprise Architecture Admin (sn_apm.apm_admin)- to access the Publishing Center page in Enterprise Architecture Workspace
- Knowledge Base Admin (knowledge_admin)- to publish knowledge base articles
- Service Portal Admin (sp_admin)- to associate the knowledge base with portals

Configure publishing workflows

You can create and manage publishing configurations that define:

- What Enterprise Architecture content is included
- How the content is structured using AND/OR operators
- Where the published output is delivered

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Each configuration represents a repeatable publishing setup whenever data changes.

Monitor publishing status

You can track the execution of publishing workflows, including:

- Whether a publishing job is in progress, completed, or failed
- The outcome of each publishing run
- Errors or warnings encountered during publishing

This visibility helps you validate publishing results and quickly identify issues.

View publishing history

You can view all the publishing activity, including:

- Historical publishing runs
- Execution timestamps
- Status and results for each run

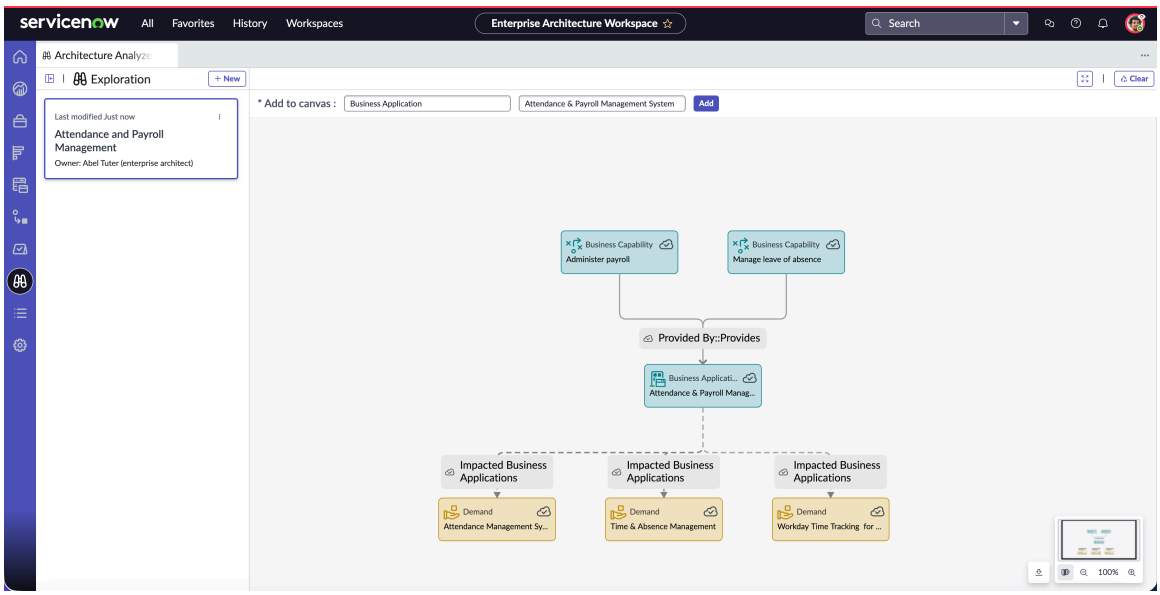
Publishing history provides traceability and operational insight, making it easier to audit changes and understand when published content was last refreshed.

Related topics

- Working with the publishing center
- Published TRM catalog experience
- Access the published TRM catalog knowledge base
- Understanding the publishing results and knowledge base output

Exploring the architecture analyzer

You can use the Architecture Analyzer in the Enterprise Architecture Workspace to visually explore and analyze the relationships between architectural entities.



The Architecture Analyzer is a lightweight exploration tool for rapid, on demand analysis. You can use it when you want to quickly analyze entity relationships and understand dependencies without the overhead of maintaining a versioned diagram.

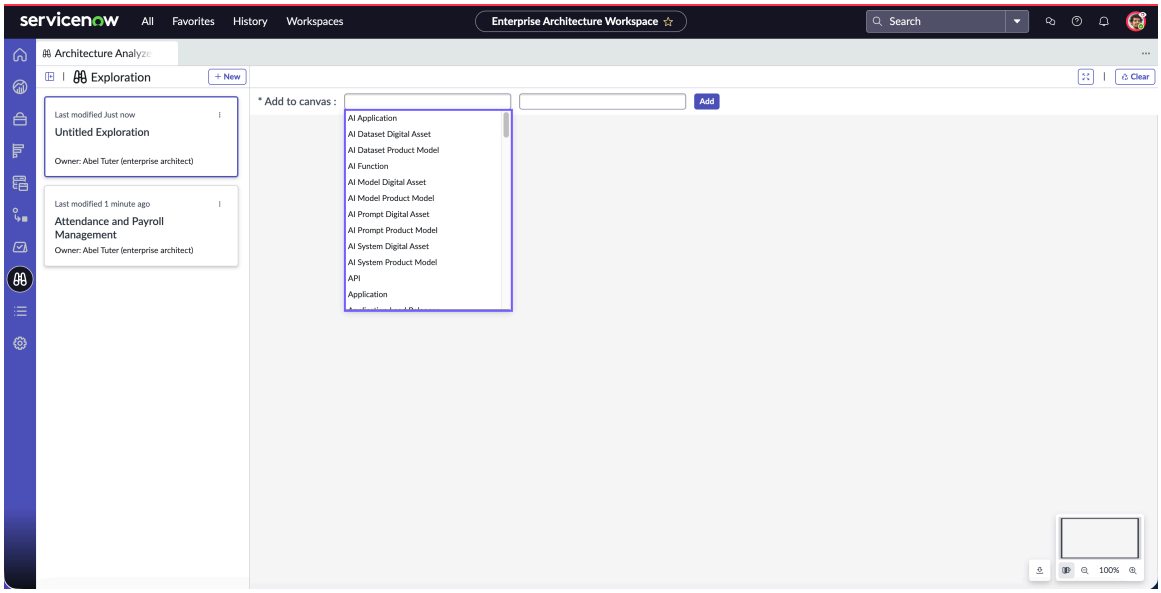
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The Architecture Analyzer provides you with an interactive exploration canvas to visualize relationships between architectural entities such as business applications, business capabilities, application services, and information objects. By mapping the upstream and downstream relationships, you can also assess the impact of architectural changes and perform high-level architecture analysis.

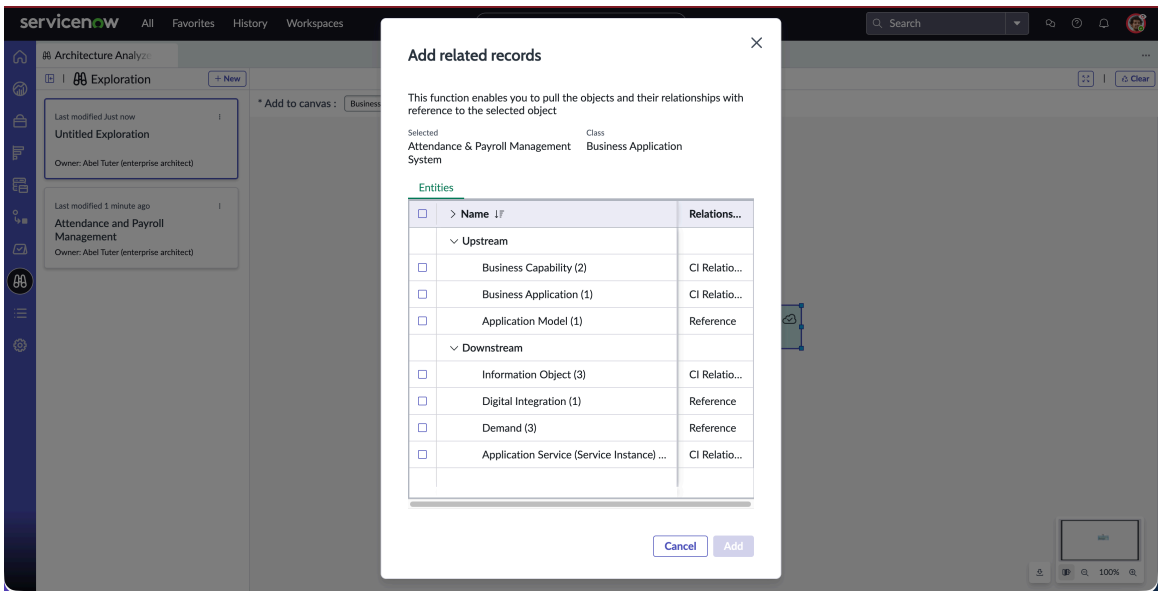
Explorations are auto-saved, enabling you to continue your analysis from where you last left off.

You can perform the following on the architecture analyzer page:

- Add architectural entities and visualize their relationships
- Add any supported architectural entity type to the canvas by selecting the entity class and searching for a specific record



- Expand analysis by adding upstream and downstream related records from any element on the canvas



- Tweak the canvas display according to your requirement by performing the following:

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- To hide the left navigation pane and the **Add to canvas** boxes, select the toggle full-screen icon ()
- To hide just the left navigation pane, select the toggle sidebar icon ()
- To clear all entities from the canvas and the selections made in the **Add to canvas** boxes, select the **Clear** button ()
- To download the exploration canvas in image format, select the download as an image icon ()

Related topics

Working with architecture analyzer

Create an exploration in the architecture analyzer

Exploring generating documents from diagrams

Generating documents for a diagram helps you to transform modeling diagrams into governed, reusable architectural documents using predefined templates.

Generate documents from diagrams overview

This feature connects diagram modeling, document templates, and portfolio-level document governance into a single, traceable workflow.

Generated documents are stored as architectural documents under Information Portfolio of the Portfolio page. The documents are governed through architectural versions, lifecycle states, and related entities. You can discover, review, and navigate documents independently of the original diagram.

When you generate a diagram from the modeling page, a new architectural artifact gets created and a draft architectural version is created for that document.

Generating documents from diagrams helps you to:

- Eliminate manual copy-paste from diagrams
- Ensure documents are generated from a specific diagram version and capture its associated metadata at the time of creation.
- Provides portfolio-level visibility of diagram-generated documents
- Supports review, approval, and distribution workflows

Related topics

Generate a document from a diagram

View documents for a diagram

Configuring Enterprise Architecture Workspace

As an administrator, use this section to configure the Enterprise Architecture Workspace.

Related topics

Exploring Enterprise Architecture Workspace

Managing Enterprise Architecture Workspace

Integrating Enterprise Architecture Workspace with other applications

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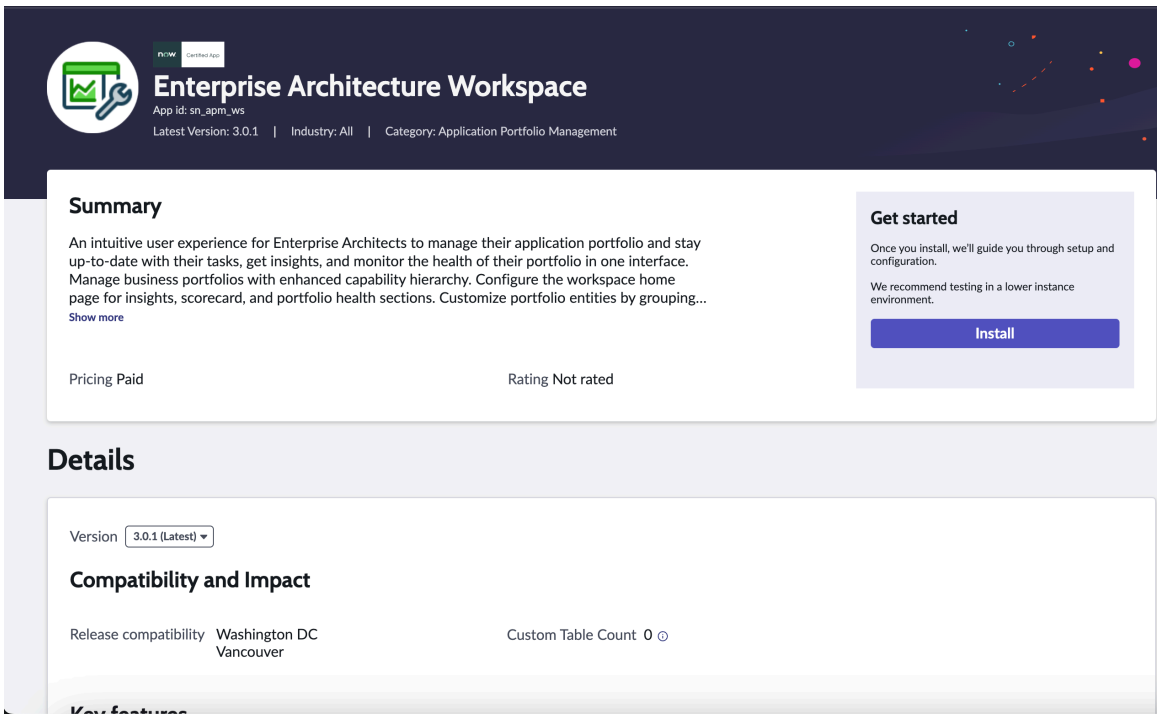
Install Enterprise Architecture Workspace

Install the Enterprise Architecture Workspace application (sn_apm_ws)if you have the admin role.

Before you begin

- Review the Enterprise Architecture Workspace application listing in the ServiceNow Store for information on dependencies, licensing or subscription requirements, Application Portfolio Management plugin (com.snc.apm).
- For enabling the technology portfolio management information in the Enterprise Architecture Workspace:
  - Ensure you have activated the Basic Software Asset Management (com.snc.sams).
  - Ensure you have installed the Technology Portfolio Management (sn_apm_tpm) store app.

Role required: admin



Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the application using the filter criteria and search bar.

   You can search for the application by its name or ID. If you cannot find an application, you may have to request it from the ServiceNow Store.

   Visit the ServiceNow Store to view all the available apps, and for information about submitting requests to the store. For cumulative release notes information for all released apps, see the ServiceNow Store version history release notes.

3. Select a version from the list and select **Install**.

   In the Review Installation Details dialog box, any dependencies installed with your application are listed.

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4. If you're prompted, follow the links to the ServiceNow Store to get any additional entitlements for dependencies.
5. **Optional:** If demo data is available and you want to install it, select the **Load demo data** check box.
   Demo data are the sample records that describe application features for common use cases. Load the demo data when you first install the application on a development or test instance.
6. Select **Install**.

Related topics

- Enterprise Architecture Workspace access roles
- Tables installed with Enterprise Architecture Workspace
- Granular admin role changes in Enterprise Architecture
- Application plugin installation sequence for Enterprise Architecture Workspace
- Scheduled jobs installed with Enterprise Architecture Workspace

Components installed with Enterprise Architecture Workspace

Several types of components are installed with Enterprise Architecture Workspace including user roles, scheduled jobs, tables, and scripts.

Roles installed with Enterprise Architecture Workspace

The following roles are available in Enterprise Architecture Workspace. After access is granted to a role, all users and groups assigned to that role inherit the permissions. Roles can contain other roles, and any access granted to a role is also granted to any role that includes it. For the full breakdown of which roles are required for each functional area, see Enterprise Architecture Workspace access roles.

Role	Description	Typical persona
sn_apm.apm_admin	Full administrative access to configure and manage Enterprise Architecture Workspace settings, including Setup page configuration for all functional areas. Includes all permissions of sn_apm.apm_analyst.	EA administrator, IT architect lead
sn_apm.apm_analyst	Create and manage key portfolio records such as business applications and digital integrations. Approve or reject requests when assigned to the Enterprise Architect group. Includes all permissions of sn_apm.apm_user.	Enterprise architect, solution architect
sn_apm.apm_user	Create and update portfolio data across business architecture, information portfolio, technology portfolio, modeling,	Application owner, business analyst, portfolio manager

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Role	Description	Typical persona
	and data certification. Includes all permissions of sn_apm.apm_read.	
sn_apm.apm_read	Read-only access to all pages and records in Enterprise Architecture Workspace. Cannot create or update data. For more information, see Business stakeholder role for Enterprise Architecture Workspace.	Business stakeholder, executive, auditor

Scheduled jobs installed with Enterprise Architecture Workspace

List of scheduled jobs for Enterprise Architecture Workspace

Scheduled job	Description
Update Capability Hierarchies In Grid	Updates business capabilities hierarchy in the Business Portfolio page. A hierarchy ID is assigned to the newly created capability.
Populate Number field in TPM Discovered Technologies	Populates missing Technology Lifecycle Management (TLM) lifecycle record identifiers for TPM Discovered Technology records created with TPM plug-in versions earlier than 1.9.0.
Populate Technology Lifecycle Risks	Populates the TPM technology lifecycle risks data in the TPM Technology Lifecycle Risks [sn_apm_tpm_technology_risk] table.
Populate TPM Discovered Technologies and Lifecycles	Populates the technology lifecycle data in the TPM Technology Lifecycle [sn_apm_tpm_technology_lifecycle] table. The data includes end of support date, end of extended support date, and end of life date for your software and hardware models. **Note:** The data for the software products is displayed only when the Software Asset Management (SAM) Foundation or Software Asset Management (SAM) Professional plugin is installed.
Populate TRM technical debts in the EA Workspace	Populates the latest technical debt data for your application portfolio the Technical Debt [sn_apm_trm_standards_technical_debt] table.

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List of scheduled jobs for Enterprise Architecture Workspace (continued)

Scheduled job	Description
	Note: The *Populate TRM technical debts in the EA Workspace* scheduled job will be available only when the Software Asset Management (SAM) Foundation or Software Asset Management (SAM) Professional plugin is installed.
Populate TRM Technical debt for production applications	
Delete Archived Tech Debts	Runs automatically on the first day of every month and deletes Archived technical debt records whose **Updated** value is older than the retention period set in the system property *sn_apm_tpm.monthsToDeleteArchivedTechDebt*. The default retention period is 12 months. You can run this job manually to apply a retention period change immediately.
CSDM Product Model Assignment	Generates the Model ID for existing business applications with empty Model ID fields. An application model is a structured representation of a business application's components and their relationships and interactions within your application landscape.
Sync TRM Product Names with Software Products	Syncs the names of Technology Reference Model (TRM) products of type Software with the names of their linked Software Asset Management (SAM) software products in the TRM Products [sn_apm_trm_standards_product] table. This scheduled job is inactive by default and runs on demand.
Update Score Range in Indicator Score Table	Populates the TCO score range field on existing Indicator Score [apm_app_indicator_score] records. Run this job on upgraded instances so the **Business applications by TCO score** widget on the **Portfolio TCO** dashboard displays TCO score bands instead of **(empty)**. The job is inactive by default and must be run on demand.

Tables installed with Enterprise Architecture Workspace

Table	Description
BA Product Model Map [sn_apm_ws_ba_product_model_map	Stores the mapping between a business application and its application model.

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Table	Description
]	
Business Application TRM Product Map [sn_apm_ws_business_app_trm_product_map]	Stores the mapping between a business application's discovered technology and the TRM product that governs its obsolescence status.
APM EA Configuration [sn_apm_ws_ea_configuration]	Stores Enterprise Architecture Workspace customization and access management configuration.
EA doc page [sn_apm_ws_ea_doc_page]	Stores architectural document pages created from document templates in Enterprise Architecture Workspace.
Software Model Risks [sn_apm_tpm_software_model_risk]	Stores software models that are at risk.
Software Risk Parameter Scores [sn_apm_tpm_risk_param_score]	Stores software models that are nearing their end of life.
Hardware Model Risks [sn_apm_tpm_hardware_model_risk]	Stores hardware models that are at risk.
Hardware Risk Parameter Scores [sn_apm_tpm_hm_risk_param_score]	Stores hardware models nearing their end of life.
TPM Discovered Technologies [sn_apm_tpm_discovered_technology]	Stores hardware and software elements in your enterprise.
TPM Technology Lifecycle [sn_apm_tpm_technology_lifecycle]	Stores the technology life cycles associated with the discovered technologies.
TPM Technology Lifecycle Exception [sn_apm_tpm_technology_lifecycle_exception]	Stores the life cycles that were approximated or couldn't be found from ServiceNow® Software Asset Management Professional or ServiceNow® Hardware Asset Management Professional.
TPM Discovered Technology Run Log [sn_apm_tpm_discovered_technology_run_log]	Stores when ServiceNow® Technology Lifecycle Management (TPM) refreshed its contents against Software Asset Management Professional and Hardware Asset Management Professional.
TPM Technology Risk [sn_apm_tpm_technology_risk]	Stores the TPM technology risk information.
TRM Product Capability Map [sn_apm_ws_trm_prod_cap_map]	Stores the mapping between product capabilities and TRM products.
TRM Product Lifecycle Request [sn_apm_trm_product_lifecycle_request]	Stores requests to add a new lifecycle to an existing TRM product.

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Table	Description
TRM Product Request [sn_apm_trm_product_request]	Stores requests to add a new product to the TRM.
TRM Category [sn_apm_trm_standards_category]	Stores the categories used to group TRM products.
TRM Phase [sn_apm_trm_standards_phase]	Stores the lifecycle phases (approved, unapproved, approved with constraints, divest, and evaluation) that can be assigned to a TRM product lifecycle.
TRM Product [sn_apm_trm_standards_product]	Stores the software and hardware products defined in the Technology Reference Model.
TRM Product Lifecycle [sn_apm_trm_standards_product_lifecycle]	Stores the lifecycle records (version or edition, phase, and start and end dates) associated with a TRM product.
TRM Technical Debt [sn_apm_trm_standards_technical_debt]	Stores technical debt records for software in business applications that isn't aligned with approved TRM software phases.

UI policies installed with Enterprise Architecture Workspace

UI Policy	Table
Manage access is false	APM EA Configuration [sn_apm_ws_ea_configuration]
Customization type is visualization	APM EA Configuration [sn_apm_ws_ea_configuration]
Customization type is script	APM EA Configuration [sn_apm_ws_ea_configuration]
Manage access is true	APM EA Configuration [sn_apm_ws_ea_configuration]
Show Subscriber Subtype when type = Data	
Show/Hide Subscriber Company	
Show subtype when subscriber type = data	Digital Integration [sn_apm_di_digital_integration]
Show Hide Digital Integration Field	Digital Integration Request [sn_apm_di_digital_integration_request]
Make Provider BA read -only	Digital Integration [sn_apm_di_digital_integration]

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UI Policy	Table
Show subtype when subscriber type = data	Digital Integration Request [sn_apm_di_digital_integration_request]
Show/Hide Subscriber Business Application	
Field "Integration User (ServiceNow)" is editable, when the Provider Business Application of the related Digital Interface is set to Platform Host = ServiceNow	Credential [sn_apm_di_credential]
Show integration name field when 'Is New Integration' is true	
Field "Connection and Credential Alias" is editable, when the Provider Business Application of the related Digital Interface is set to Platform Host = ServiceNow	Credential [sn_apm_di_credential]
Strict hide fields for retire flow	Digital Integration Request [sn_apm_di_digital_integration_request]
show hide fields based for request new integration	Digital Integration Request [sn_apm_di_digital_integration_request]
show hide fields based for retire request	Digital Integration Request [sn_apm_di_digital_integration_request]
When Data Flow Direction is --None-- or "Bidirectional", hide the Initiating Application field	Digital Integration [sn_apm_di_digital_integration]
Hide the column Provider Digital Interface if it is empty	Digital Integration [sn_apm_di_digital_integration]
Set the field Activity Type to read only	Business Process Activity [cmdb_ci_business_process_activity]
Hide the column Value Stream if it is empty	Value Stream Stage [cmn_value_stream_stage]

Client scripts installed with Enterprise Architecture Workspace

Client script	Table	Description
Hide/Show Product Capability Related Lis	Business Application [cmdb_ci_business_app]	Hide Product Capability related list when model_id is empty.
Hide Type Field	Architectural Artifact [sn_apm_architectural_artifact]	
if manage access is false	APM EA Configuration [sn_apm_ws_ea_configuration]	
if section is overview	APM EA Configuration [sn_apm_ws_ea_configuration]	
Set ADR Type For Artifact Version	Architectural Artifact Version [sn_apm_architectural_version]	

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Client script	Table	Description
Show hardware/software product fields	TRM Product Lifecycle [sn_apm_trm_standards_product_lifecycle]	
Show hardware/software product fields	TRM Product Lifecycle Request [sn_apm_trm_product_lifecycle_request]	
Auto Populate HWModel relatedFields	TRM Product Lifecycle Request [sn_apm_trm_product_lifecycle_request]	
Set Category Mandatory	TRM Product [sn_apm_trm_standards_product]	
Type field change	TRM Product [sn_apm_trm_standards_product]	
Enable/Disable Other Categories	TRM Product Request [sn_apm_trm_product_request]	
Enable/Disable Other Categories	TRM Product [sn_apm_trm_standards_product]	
Handle field properties	TRM Product Request [sn_apm_trm_product_request]	
Handle field properties	TRM Product Lifecycle [sn_apm_trm_standards_product_lifecycle]	
Type field change	TRM Product Request [sn_apm_trm_product_request]	
is New Product field change	TRM Product [sn_apm_trm_standards_product]	
is New Product field change	TRM Product Request [sn_apm_trm_product_request]	
Handle Field properties	TRM Product Lifecycle Request [sn_apm_trm_product_lifecycle_request]	
Auto Populate HWModel relatedFields	TRM Product Lifecycle [sn_apm_trm_standards_product_lifecycle]	
Populate Publisher from Hardware Product	TRM Product [sn_apm_trm_standards_product]	
Read Only TRM product fields	TRM Product [sn_apm_trm_standards_product]	
Set Category Mandatory	TRM Product Request [sn_apm_trm_product_request]	
Architectural Version Allowed File Types	Architectural Artifact Version [sn_apm_architectural_version]	This script allows only 3 file types to choose from when creating a new Architectural Artifact version.

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System properties installed with Enterprise Architecture Workspace

System property	Description
sn_apm_ws.appRationalizationMaximumBubbles	Maximum number of bubbles on the bubble chart to be shown
sn_apm_ws.app_indicator_scoring_profile	
sn_apm_ws.app_rationalization_default_filter	Application Rationalization Default Filter
sn_apm_ws.batch_size_ba_lifecycle_gantt	
sn_apm_ws.certificationPolicyTables	Default tables used to show certification policies on enterprise architecture workspace
sn_apm_ws.record_mention_config	Configuration for tagging other ServiceNow records with architectural artifacts in Enterprise Architecture Workspace.
glide.ui.sn_apm_trm_product_lifecycle_request_activity.fields	TRM Product Lifecycle Request activity formatter fields
glide.ui.sn_apm_trm_product_request_activity.fields	TRM Product Request activity formatter fields
sn_apm_trm.is_product_life_cycle_tech_debt_enabled	Make this property false to disable calculating level 2 technical debt.
sn_apm_trm.noOfPublishersPerTRMPage	Number of publishers to show per page.
sn_apm_tpm.configurationItemsWithSoftwareInstalls	Lists hardware configuration items which have software models for TPM discovery process
sn_apm_tpm.discoveryModelProductTypesForTPM	Product types of discovery models to consider for TPM software suggestions

Business rules installed with Enterprise Architecture Workspace

Business rule	Table	Description
Default title for doc page collection	EA doc page [sn_apm_ws_ea_doc_page]	
Populate default values for version note	Architectural Artifact Version [sn_apm_architectural_version]	
Auto business rule for Assessments	Business Application [cmdb_ci_business_app]	
Auto business rule for Assessments	Business Application [cmdb_ci_business_app]	
Auto deletion rule for Assessments	Business Application [cmdb_ci_business_app]	
Avoid duplicate name for TRM Categories	TRM Category [sn_apm_trm_standards_category]	
Check Duplicate Product	TRM Product [sn_apm_trm_standards_product]	

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Business rule	Table	Description
Check Duplicate Product Lifecycle	TRM Product Lifecycle [sn_apm_trm_standards_product_lifecycle]	
Check Duplicate Product Lifecycle HW	TRM Product Lifecycle [sn_apm_trm_standards_product_lifecycle]	
Check Duplicate Product Lifecycle Req	TRM Product Lifecycle Request [sn_apm_trm_product_lifecycle_request]	
Check Duplicate Product Lifecycle Req HW	TRM Product Lifecycle Request [sn_apm_trm_product_lifecycle_request]	
Check Duplicate Product Request	TRM Product Request [sn_apm_trm_product_request]	
Check Duplicate TRM Phase	TRM Phase [sn_apm_trm_standards_phase]	
Date Validations	TRM Product Lifecycle Request [sn_apm_trm_product_lifecycle_request]	
Display successful message with link	TRM Product Lifecycle Request [sn_apm_trm_product_lifecycle_request]	
Display successful message with link	TRM Product Request [sn_apm_trm_product_request]	
Populate Name HW	TRM Product [sn_apm_trm_standards_product]	
Populate Name HW	TRM Product Request [sn_apm_trm_product_request]	
Populate scratchpad for TRM Prod Request	TRM Product Request [sn_apm_trm_product_request]	
Populate scratchpad for TRM Product	TRM Product [sn_apm_trm_standards_product]	

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Business rule	Table	Description
Restrict emptying category	TRM Product [sn_apm_trm_standards_product]	
Update product lifecycle exist flag	TRM Product Lifecycle [sn_apm_trm_standards_product_lifecycle]	
Validate Parent Category Hierarchy	TRM Category [sn_apm_trm_standards_category]	
TPM Audit on TPM Lifecycle Exception	TPM Technology Lifecycle Exception [sn_apm_tpm_technology_lifecycle_exception]	Fetches the life cycles that were approximated or couldn't be found from Software Asset Management (SAM) Professional or Hardware Asset Management (HAM) Professional.
Populate TPM Technology Lifecycle table	TPM Discovered Technology [sn_apm_tpm_discovered_technology]	Fetches the technology life-cycle data for your hardware and software elements in your enterprise.
Update Technology Lifecycle Info	TPM Discovered Technology [sn_apm_tpm_discovered_technology]	Updates technology life-cycle data for your hardware and software elements.
Active From/Until Date Validation	Digital Integration [sn_apm_di_digital_integration]	
Avoid DI subscribers with duplicate name	Digital Integration [sn_apm_di_digital_integration]	
Avoid DI with duplicate name	Digital Interface [sn_apm_di_digital_interface]	
Avoid duplicate dis submit request	Digital Integration Request [sn_apm_di_digital_integration_request]	
Avoid duplicate retire request	Digital Integration Request [sn_apm_di_digital_integration_request]	
Avoid invalid Subscriber BA	Digital Integration [sn_apm_di_digital_integration]	
Avoid making a circular relationship	Digital Interface [sn_apm_di_digital_interface]	

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Business rule	Table	Description
Avoid Same Subscriber and Provider BA	Digital Integration [sn_apm_di_digital_integration]	
Avoid Same Subscriber and Provider BA	Digital Integration Request [sn_apm_di_digital_integration_request]	
Avoid update of some fields	Digital Integration [sn_apm_di_digital_integration]	
Avoid update of some fields	Digital Interface [sn_apm_di_digital_interface]	
Bidirectional Data Flow - clear field	Digital Integration [sn_apm_di_digital_integration]	
Check Provider references	Digital Interface [sn_apm_di_digital_interface]	
Check Subscribers	Digital Integration [sn_apm_di_digital_integration]	
Create Relationship Record	Digital Interface [sn_apm_di_digital_interface]	
Create Relationship Record	Digital Integration [sn_apm_di_digital_integration]	
Delete Relationship Record	Digital Interface [sn_apm_di_digital_interface]	
Delete Relationship Record	Digital Integration [sn_apm_di_digital_integration]	
Restrict update of invalid Subscrber ifa	Digital Integration [sn_apm_di_digital_integration]	
Set BA in Digital Interface Record	Digital Integration [sn_apm_di_digital_integration]	
Stop delete if linked to digital integra	Digital Interface [sn_apm_di_digital_interface]	

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Business rule	Table	Description
Validate Provider BA	Digital Interface [sn_apm_di_digital_interface]	
Verify Duplicate API to DIG INTF-insert	Digital Interface to API [sn_apm_di_dintf_api]	
Verify Duplicate API to DIG INTF-update	Digital Interface to API [sn_apm_di_dintf_api]	
Verify Duplicate Information Object	Digital Integration Information Object [sn_apm_di_information_objects]	
Verify Duplicate Information Object	Digital Interface Information Object [sn_apm_di_dintf_information_object]	
Verify Duplicate SDLC Component	Digital Interface SDLC Component [sn_apm_di_dintf_sdlc_component]	
Avoid duplicate entity configurations	Entity Configuration [sn_apm_mdtl_com_entity_configuration]	
Deleting entity value records	Architectural Artifact Version [sn_apm_architectural_version]	

Related topics

Enterprise Architecture Workspace access roles

Install Enterprise Architecture Workspace

Enterprise Architecture Workspace access roles

The following roles help you to configure and use the Enterprise Architecture Workspace application. After access has been granted to a role, all the groups or users assigned to the role are granted access. Roles can contain other roles, and any access granted to a role is granted to any other role that includes it.

Enterprise Architecture Workspace roles

The following roles are available in Enterprise Architecture Workspace. After access is granted to a role, all users and groups assigned to that role inherit the permissions. Roles can contain other roles, and any access granted to a role is also granted to any role that includes it.

Enterprise Architecture Workspace roles

Role	Description	Typical persona
sn_apm.apm_admin	Full administrative access to configure and manage Enterprise Architecture Workspace settings,	EA administrator, IT architect lead

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Enterprise Architecture Workspace roles (continued)

Role	Description	Typical persona
	including Setup page configuration for all functional areas. Includes all permissions of sn_apm.apm_analyst.	
sn_apm.apm_analyst	Create and manage key portfolio records such as business applications and digital integrations. Approve or reject requests when assigned to the Enterprise Architect group. Includes all permissions of sn_apm.apm_user.	Enterprise architect, solution architect
sn_apm.apm_user	Create and update portfolio data across business architecture, information portfolio, technology portfolio, modeling, and data certification. Includes all permissions of sn_apm.apm_read.	Application owner, business analyst, portfolio manager
sn_apm.apm_read	Read-only access to all pages and records in Enterprise Architecture Workspace. Cannot create or update data. For more information, see Business stakeholder role for Enterprise Architecture Workspace.	Business stakeholder, executive, auditor

Note: The global admin role continues to function through role inheritance. However, Enterprise Architecture now uses feature-specific granular admin roles. Use sn_apm.apm_admin instead of admin for application-level administration wherever possible. For more information, see Granular admin role changes in Enterprise Architecture.

Enterprise Architect group

The Enterprise Architect group is a platform user group that acts as a governance layer on top of the standard role hierarchy. It is configured intentionally to separate approval authority from general role access: users with the sn_apm.apm_analyst role can perform approvals and governance actions only when they are also members of this group. Assigning the role alone is not sufficient for these actions.

To add or modify members of the Enterprise Architect group, navigate to **All** > *Enterprise Architecture* > **Administration** > **Services Approval Group** > **Enterprise Architect Group**.

The following table lists the capabilities that require membership in the Enterprise Architect group.

Capabilities requiring Enterprise Architect group membership

Functional area	Role also required	Capabilities unlocked by group membership
Technology Reference Model (TRM)	sn_apm.apm_analyst	• Approve or reject TRM product requests • Approve or reject TRM product lifecycle requests

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Capabilities requiring Enterprise Architect group membership (continued)

Functional area	Role also required	Capabilities unlocked by group membership
		• Create TRM product lifecycles • View and update pending TRM requests
Enterprise modeling and visualization	sn_apm.apm_analyst	• Approve or reject modeling diagram requests • View shape library configurations, entity configurations, and modeling configuration and relationship definitions
Technology Reference Model (TRM) — data access	Group membership only	Read data from the following TRM standards tables: • TRM Standards phase (sn_apm_trm_standards_phase) • TRM standards product lifecycle (sn_apm_trm_standards_product_lifecycle) • TRM standards technical debt (sn_apm_trm_standards_technical_debt)
Application portfolio	Group membership	Retire a business application
Architectural artifacts	Group membership	• Approve or reject architectural artifact version approval requests. EA group members receive approval requests by email and can approve or reject directly from the notification. • Owner permission on the following architecture document types: ○ Application Architecture ○ Technology Architecture ○ Business Architecture ○ Data Architecture
Architecture Review Board (ARB)	Group membership	Request an ARB architecture review
Publishing Center / TRM Catalog	sn_apm.apm_admin + knowledge_admin + sp_admin	Create, publish, and manage TRM Publishing Configurations **Note:** sp_admin is required in addition to sn_apm.apm_admin and knowledge_admin for EA group members accessing the Publishing Center.

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Capabilities requiring Enterprise Architect group membership (continued)

Functional area	Role also required	Capabilities unlocked by group membership
Administration	Group membership	• Access the **Services Approval Group** module to view and manage EA workflow groups • Configure the EA approval group using the **Configure Enterprise Architecture Group** step in APM Guided Setup

Installation and plugin activation

Plugin activation requires the global admin role.

Capability	admin	apm.app	apm.apm_	apm.apm_	apm.apm_	Notes
Activate the EA Workspace plugin	✓					
Activate the Technology Lifecycle Management (TLM) plugin	✓					
Activate the Technology Reference Model (TRM) plugin	✓					
Activate the Read only roles for Enterprise Architecture plugin	✓					
Run the scheduled job to sync TRM product names with linked ServiceNow Otto for SAM software product names	✓					Requires the admin role. Run on demand from **All** > **System Definition** > **Scheduled Jobs**.
Run the Migrate BA Product Model Map from EA Workspace scheduled job	✓					Requires the admin role. Run on demand from **All** > **System Definition** > **Scheduled Jobs**.

Setup page

The Setup page provides configuration options for all functional areas in the workspace.

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Capability	admin	sn_apm.apm_admin	sn_apm.apm_read	sn_apm.apm_write	sn_apm.apm_user	Notes
Configure application categories, category groups, and families	✓	✓				
Configure application and capability indicators	✓	✓				
Configure scoring profiles and attach profile indicators	✓	✓				
Configure TRM phases and TRM categories	✓	✓				
Configure information data domains	✓	✓				
Configure architectural artifact categories	✓	✓				
Configure demand actions	✓	✓				
Configure modeling settings, including shape libraries, entities, relationships, and diagram actions	✓	✓				
Configure total cost of ownership (TCO) sources, source cost types, and cost types; set TCO dashboard properties	✓					
Configure Publishing Center for TRM catalog publishing; modify TRM catalog publishing configurations; associate service portals with a TRM catalog knowledge base	✓	✓	✓	✓		Requires sn_apm.apm_admin and knowledge_admin
Add and edit certification policies from the Setup page (legacy CMDB-based policies)	✓	✓	✓	✓		Requires certification_admin

Business architecture

Business architecture covers business capabilities, business units, departments, goals, value streams, value stream stages, business processes, and demands in the Portfolio List view.

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Capability	admin	apm.app	apm.apm_	apm.spra	apm.apm_	Notes
Add and edit business capabilities and sub-capabilities	✓	✓	✓	✓		
Add and edit business units	✓	✓	✓	✓		
Add and edit departments; add users to departments	✓	✓	✓	✓		
Add and edit goals; add quantitative and qualitative targets; create sub-goals	✓	✓	✓	✓		
Add and edit value streams; add application models to value streams	✓	✓	✓	✓		
Add and edit value stream stages; associate business processes with value stream stages; add or remove business capabilities from value stream stages	✓	✓	✓	✓		
Add and edit business processes	✓	✓	✓	✓		
Add and edit demands	✓	✓	✓	✓		
Create demands from the Business Portfolio view and Application Rationalization views	✓	✓	✓	✓		
Export business portfolio data	✓	✓	✓	✓		
View all business architecture records	✓	✓	✓	✓	✓	

Application portfolio

The application portfolio covers business applications, application services, digital integrations, digital interfaces, and product capabilities.

Capability	admin	apm.app	apm.apm_	apm.spra	apm.apm_	Notes
Add new business applications	✓	✓	✓			

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Capability	admin	apm.app	apm.app	apm_app	apm.app	apm.apm_	Notes
Add and edit digital integrations; associate artifacts and information objects with digital integrations	✓	✓	✓				
Add and edit digital interfaces; manage Agile Development components, information objects, and credentials; relate a digital interface to an API	✓	✓	✓				
Update business application details	✓	✓	✓	✓			
Associate and unassign business capabilities, product capabilities, architectural artifacts, information objects, and TRM products with business applications	✓	✓	✓	✓			
Create diagrams and unified maps from a business application	✓	✓	✓	✓			
View the business application roadmap	✓	✓	✓	✓			
Add and edit application services	✓	✓	✓	✓			
Add and edit product capabilities; view all product capabilities	✓	✓	✓	✓			
View and manage AI systems and AI portfolio items associated with business applications	✓	✓	✓	✓			
Run the job to generate model IDs for business applications	✓	✓	✓	✓			
View all business applications, application services, digital integrations, digital interfaces, and associated records	✓	✓	✓	✓	✓		

Information portfolio

The information portfolio covers data domains, information objects, architectural artifacts, and architectural decision records (ADRs).

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Capability	admin	apm.app	apm.app	apm_app	apm.app	apm.apm_	Notes
Add and edit data domains and information objects	✓	✓	✓	✓			
Create and edit architectural artifacts; add versions, related entities, and associated records	✓	✓	✓	✓			
Share architectural artifacts with users and groups; manage access permissions for architectural artifacts	✓	✓	✓	✓			
Request approval for an artifact version; download and delete architectural artifact versions	✓	✓	✓	✓			
Create and edit architectural decision records (ADRs); add pages, subpages, and versions to ADRs	✓	✓	✓	✓			
Tag users and records in an ADR document; request approval for an ADR	✓	✓	✓	✓			
Associate architectural artifacts with business applications, capabilities, business processes, digital integrations, and TRM products	✓	✓	✓	✓			
View all data domains, information objects, architectural artifacts, artifact versions, and ADRs	✓	✓	✓	✓	✓		

Technology Portfolio Management (TPM)

Technology Portfolio Management tracks software and hardware lifecycle data for business applications and application services.

Capability	admin	apm.app	apm.app	apm_app	apm.app	apm.apm_	Notes
Activate the TPM plugin	✓						
Update the system property to gather software from CMDB	✓						

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Capability	admin	apm.app	apm.app	apm_app	sn_apm.sn_apm	apm.apm_	Notes
Update TPM lifecycle data for a business application or application service	✓	✓	✓	✓			
View technology lifecycle data and technology risk information	✓	✓	✓	✓			
View technology portfolio audit risk details and update verification status	✓	✓	✓	✓			
Run the job to populate TPM lifecycle data	✓	✓	✓	✓			
Run the scheduled job to update TPM data	✓	✓	✓	✓			
Run the scheduled job to generate TPM risk; restart the TPM scheduled job	✓	✓	✓	✓			
View TPM logs; run the job to populate TPM lifecycle identifiers	✓	✓	✓	✓			
View technology portfolio data, lifecycle timelines, and risk information	✓	✓	✓	✓	✓		

Technology Reference Model (TRM)

The Technology Reference Model provides a structured catalog of approved technologies and their lifecycle phases.

Capability	admin	apm.app	apm.app	apm_app	sn_apm.sn_apm	apm.apm_	Notes
Activate the TRM plugin	✓						
Approve or reject TRM product requests	✓	✓	✓				Must be in the Enterprise Architect group
Approve or reject TRM product lifecycle requests; create TRM product lifecycles	✓	✓	✓				Must be in the Enterprise Architect group

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Capability	admin	apm.app	apm.app	sn_apm	apm.app	apm.apm_	Notes
View and update pending TRM requests	✓	✓	✓				Must be in the Enterprise Architect group
View all TRM products, grouped by category or individually	✓	✓	✓	✓			
View all TRM phases and categories	✓	✓	✓	✓			
Request a new TRM product; request a TRM product lifecycle change	✓	✓	✓	✓			
Create TRM product lifecycle requests	✓	✓	✓	✓			
Associate architectural artifacts with TRM products	✓	✓	✓	✓			
View, create, add, and remove business capabilities and business applications associated with TRM products	✓	✓	✓	✓			
View TRM technical debt; run the job to generate TRM technical debts	✓	✓	✓	✓			
Export TRM product catalog data	✓	✓	✓	✓			
View TRM products, categories, phases, technical debt, and lifecycle timelines	✓	✓	✓	✓	✓		

Enterprise modeling and visualization

Enterprise modeling and visualization lets users create, manage, and publish architecture diagrams.

Capability	admin	apm.app	apm.app	sn_apm	apm.app	apm.apm_	Notes
Approve or reject modeling diagram requests	✓	✓	✓				Must be in the Enterprise Architect group
View shape library configurations, entity configurations, modeling	✓	✓	✓				Must be in the Enterprise Architect group

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Capability	admin	apm.app	apm.app	apm_app	apm.app	apm.apm_	Notes
configuration, and relationship definitions							
Create empty diagrams and synchronize them with the ServiceNow database	✓	✓	✓	✓			
Create business capability maps (BC maps), business application maps (BA maps), and business process maps (BP maps)	✓	✓	✓	✓			
Create ArchiMate diagrams, AWS architecture diagrams, and CSDM diagrams	✓	✓	✓	✓			
Add, remove, group, ungroup, expand, collapse, and delete shapes	✓	✓	✓	✓			
Add related records to shapes; add labels to connector lines	✓	✓	✓	✓			
Reorder shapes in a category; show or hide the Shapes panel; toggle between grid and list view; filter shapes	✓	✓	✓	✓			
Save a diagram as new; duplicate a diagram	✓	✓	✓	✓			
Submit a diagram for approval; synchronize a diagram and individual shapes	✓	✓	✓	✓			
Share a diagram; download a diagram; add or edit diagram version details; delete a diagram	✓	✓	✓	✓			
Create and manage custom shape libraries, custom shape elements, and custom shape actions; store images in the database for custom shapes	✓	✓	✓	✓			
Modify BPMN diagrams	✓	✓	✓	✓			
Set relationship type on a connector; set connector line style, arrowhead	✓	✓	✓	✓			Requires Owner or

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Capability	admin	apm.app	apm.app	apm_app	apm.app	apm.apm_	Notes
style, and icon for non-ArchiMate and mixed connectors; swap connector direction; add a label to a connector							Editor access to the diagram
Align shapes to a common edge or center; distribute shapes at equal spacing	✓	✓	✓	✓			Requires Owner or Editor access to the diagram. Not available in business capability map diagrams.
View diagrams and diagram details	✓	✓	✓	✓	✓		

Application rationalization

Application rationalization helps users assess and manage business applications through bubble chart and list views.

Capability	admin	apm.app	apm.app	apm_app	apm.app	apm.apm_	Notes
Analyze business applications in the bubble chart view by capability	✓	✓	✓	✓			
Create demands from the bubble chart view and list view	✓	✓	✓	✓			
Set the planned disposition of a business application	✓	✓	✓	✓			
Add and edit business application lifecycle data	✓	✓	✓	✓			
Edit business application details from the bubble chart and list views	✓	✓	✓	✓			
Edit demands and projects associated with a business application	✓	✓	✓	✓			
Update the system property to change the number of bubbles displayed	✓	✓	✓	✓			
Apply filters on the application rationalization view	✓	✓	✓	✓			

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Capability	admin	sn_apm.apm_admin	sn_apm.apm_analyst	sn_apm.apm_manager	sn_apm.apm_user	Notes
Export application rationalization list data	✓	✓	✓	✓		
View application rationalization data in bubble chart and list views	✓	✓	✓	✓	✓	

Data certification

Data certification provides a governance mechanism to promote that architecture data is accurate and complete.

Capability	admin	sn_apm.apm_admin	sn_apm.apm_analyst	sn_apm.apm_manager	sn_apm.apm_user	Notes
Create data certification policies using the certification policy wizard	✓	✓	✓	✓		Requires system admin, CMDB admin, and sn_apm.apm_analyst
Publish draft certification policies	✓					
Run data certification policies	✓					
Activate and deactivate certification policies; delete certification policies	✓					
Track certification progress across policies	✓					
Review and certify data certification tasks assigned to them	✓	✓	✓	✓		User must be assigned a certification task
Fail records that do not meet certification standards	✓	✓	✓	✓		User must be assigned a certification task
Reassign certification tasks to other users or groups; request reassignment	✓	✓	✓	✓		User must be assigned a certification task

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Capability	admin	apm.app	apm.app	apm_apm	apm.app	apm.apm_	Notes
Submit completed certification reviews	✓	✓	✓	✓			User must be assigned a certification task
View certification policies and certification status	✓	✓	✓	✓	✓		

Dashboards

Dashboards provide visibility into application health, assessment scores, and portfolio performance.

Capability	admin	apm.app	apm.app	apm_apm	apm.app	apm.apm_	Notes
View and monitor the Applications Assessment dashboard	✓	✓	✓				
View and monitor the Application 360 dashboard	✓	✓	✓				
View the workspace home dashboard and portfolio overview and health section	✓	✓	✓	✓			
Apply filters on the portfolio overview and health view	✓	✓	✓	✓			
View dashboards	✓	✓	✓	✓	✓		

Total Cost of Ownership (TCO)

Total Cost of Ownership tracks and manages direct and indirect costs associated with business applications.

Capability	admin	apm.app	apm.app	apm_apm	apm.app	apm.apm_	Notes
Activate the App TCO plugin	✓						
Create TCO sources, TCO source cost types, and TCO cost types	✓						
Set properties for TCO dashboards	✓						

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Capability	admin	sn_apm.apm_admin	sn_apm.apm_admin	sn_apm.apm_admin	sn_apm.apm_admin	Notes
View all TCO records for business applications	✓	✓	✓	✓		
create TCO records	✓	✓	✓	✓		
View TCO records	✓	✓	✓	✓	✓	

Publishing Center

The Publishing Center lets administrators publish TRM catalog data to a knowledge base for consumption through a service portal.

Capability	admin	sn_apm.apm_admin	sn_apm.apm_admin	sn_apm.apm_admin	sn_apm.apm_admin	Notes
Create and modify TRM catalog publishing configurations	✓	✓	✓	✓		Requires sn_apm.apm_admin and knowledge_admin
Configure TRM data to publish; manage article configurations	✓	✓	✓	✓		Requires sn_apm.apm_admin and knowledge_admin
Associate portals with a TRM catalog knowledge base	✓	✓	✓	✓		Requires sn_apm.apm_admin and knowledge_admin
Enable automatic synchronization of published catalogs	✓	✓	✓	✓		Requires sn_apm.apm_admin and knowledge_admin
Publish and republish TRM catalogs to the knowledge base	✓	✓	✓	✓		Requires sn_apm.apm_admin and knowledge_admin
Retire and archive published TRM catalogs; view publishing run logs	✓	✓	✓	✓		Requires sn_apm.apm_admin and knowledge_admin

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Capability	admin	apm.app	apm.app	apm.app	sn_apm.app	apm.app	apm.apm_	Notes
Access published TRM catalog content through the service portal	✓	✓	✓	✓	✓			

Architecture Analyzer

The Architecture Analyzer lets users explore and visualize relationships between architectural entities on an interactive canvas.

Capability	admin	apm.app	apm.app	apm.app	sn_apm.app	apm.app	apm.apm_	Notes
create explorations on the Architecture Analyzer canvas	✓	✓	✓	✓				
Add entities to the canvas by selecting entity type and specific record	✓	✓	✓	✓				
Add upstream and downstream related entities to a selected entity on the canvas	✓	✓	✓	✓				
Show or hide the left navigation pane and the Add to canvas panel	✓	✓	✓	✓				
Clear all entities from the canvas	✓	✓	✓	✓				
Download an exploration canvas as an image	✓	✓	✓	✓				
Rename an exploration; delete an exploration	✓	✓	✓	✓				
View existing explorations	✓	✓	✓	✓	✓			

AI systems — AI Control Tower integration

The AI systems integration surfaces AI governance data from AI Control Tower directly on business application records. Viewing full AI system records in AI Control Tower requires roles from the AI Control Tower application in addition to EA Workspace roles.

Capability	admin	apm.app	apm.app	apm.app	sn_apm.app	apm.app	apm.apm_	Notes
View the AI systems tab on a business application record	✓	✓	✓	✓				

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Capability	admin	apm.app	apm.app	sn_apm.app	sn_apm.app	apm.apm_	Notes
View AI system details including lifecycle phase, state, lifecycle status, and risk classification	✓	✓	✓	✓			
Add an existing AI Control Tower AI system to a business application	✓	✓	✓	✓			
Remove an AI system association from a business application	✓	✓	✓	✓			
Open and view the full AI system record in the AI Control Tower workspace	✓	✓	✓	✓			Requires sn_ai_governance.ai_governanc (AI Control Tower role)
View full AI system governance details in AI Control Tower, including related models, datasets, prompts, approval history, and lifecycle tasks	✓	✓	✓	✓			Requires sn_aig.ai_steward or sn_aig.ai_asset_owner (AI Control Tower roles)
Manage AI system associations with business applications from the AI Control Tower side	✓	✓	✓	✓			Requires sn_aig.ai_steward or sn_aig.ai_asset_owner (AI Control Tower roles)
View the AI systems tab on a business application record	✓	✓	✓	✓	✓		

My Entities

My Entities provides a personalized view of the records you own or manage, across all portfolio types.

Capability	admin	apm.app	apm.app	sn_apm.app	sn_apm.app	apm.apm_	Notes
View and manage your business capabilities, business processes, and business applications	✓	✓	✓	✓			
View and manage your application services, information objects, and architectural artifacts	✓	✓	✓	✓			

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Capability	admin	sn_apm.apm_	sn_apm.apm_	sn_apm.apm_	sn_apm.apm_	Notes
View and manage your TRM products, digital integrations, and digital interfaces	✓	✓	✓	✓		
View your assigned entities	✓	✓	✓	✓	✓	

Related topics

- Business stakeholder role for Enterprise Architecture Workspace
- Granular admin role changes in Enterprise Architecture
- Install Enterprise Architecture Workspace
- Components installed with Enterprise Architecture Workspace

Business stakeholder role for Enterprise Architecture Workspace

The Business Stakeholder (com.snc.business_stakeholder) plugin contains the business stakeholder role for Enterprise Architecture Workspace application. Users with this role can view or read records in the Enterprise Architecture Workspace.

Upgrade information

Upgrade customer

If you're upgrading to Brazil, the business stakeholder role for Enterprise Architecture Workspace is available only when you activate Read only roles for Enterprise Architecture (com.snc.apm_read_roles) plugin.

New customer

If you're a new customer, the Read only roles for Enterprise Architecture (com.snc.apm_read_roles) plugin is activated on zBoot. However, the business stakeholder role for Enterprise Architecture Workspace is available only when you install Enterprise Architecture Workspace plugin.

Why business stakeholder read-only role

The Business Stakeholder role is designed to give users read-only access to all the tables within the Enterprise Architecture Workspace application. This role is ideal for business stakeholders, such as business owners or managers, who need to view data but should not have the ability to modify it. By assigning this role, you ensure that these users can stay informed and monitor the data without making any changes.

Business stakeholder read-only access limitations in Enterprise Architecture Workspace

Users with the Business stakeholder role for Enterprise Architecture Workspace (sn_apm.apm_read) have view-only access to all pages. They can't create or update any data in Enterprise Architecture Workspace.

Related topics

- Exploring Enterprise Architecture Workspace
- Enterprise Architecture Workspace access roles
- ServiceNow Otto for Enterprise Architecture (EA) access roles

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ServiceNow Otto for Enterprise Architecture (EA) access roles

The following roles help you to configure and use each ServiceNow Otto for Enterprise Architecture (EA) skill.

Access to ServiceNow Otto for Enterprise Architecture (EA) skills is controlled by a combination of the EA Workspace role assigned to the user and, in some cases, additional platform-level or feature-specific roles. The table summarizes each skill, the role required to use it, and whether additional roles are needed.

ServiceNow Otto for Enterprise Architecture (EA) skills and required roles

Skill	Configure role	Use role
Configure ServiceNow Otto® for EA (all skills)	admin	Not applicable
Configure AI Data Explorer and Query Generation skills	now_assist_explorer_admin or higher (AI Data Explorer); admin (Query Generation)	Not applicable
Generate a summary for ADRs (ADR doc summarization)	admin	sn_apm.apm_user
Elaborate or shorten content in ADRs	admin	sn_apm.apm_user
Generate insights into business applications	admin	sn_apm.apm_user
Compare Enterprise Modeling and Visualization diagrams	admin	sn_apm.apm_read and sn_apm.apm_user
Elaborate or shorten content in form fields (Refine text)	admin	sn_apm.apm_user
Generate insights for EA Workspace dashboard widgets (AI Data Explorer)	now_assist_explorer_admin or higher	sn_apm.apm_user or sn_apm.apm_read; now_assist_explorer_user
Register a business application using conversational experience	admin	None (any authenticated user)
Register a digital integration using conversational experience	admin	None (any authenticated user)
Generate an enterprise architecture diagram from an uploaded image; review AI-generated shapes in split-screen mode; accept or discard low-confidence shape replacements; accept all shapes and publish the diagram to draft	admin	sn_apm.apm_user
Ask natural language questions about the EA portfolio using the Enterprise Architecture Explorer Query Agent	admin	sn_apm.apm_user

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Configuration

All ServiceNow Otto® for EA skills are configured from the ServiceNow Otto® Admin console. Configuration requires the admin role or, for AI Data Explorer skills, the now_assist_explorer_admin role.

Capability	now_assist_explorer_admin	Notes
Activate and configure all ServiceNow Otto® for EA skills from the ServiceNow Otto® Admin console (ADR summarization, business application insights, diagram change analysis, refine text, conversational experience)	✓	
Configure skill availability conditions (always available or custom conditions)	✓	
Configure role-based access to individual skills	✓	
Define and configure custom parameters for the business application insights prompt; make a copy of the business application insights skill	✓	
Set how the business application insights skill is triggered (**Automatic** or **User trigger**) and define optional conditions for the **Automatic** trigger on the **Define trigger** tab	✓	
Activate and configure conversational experience skills for registering business applications and digital integrations through Virtual Agent	✓	
Configure Query Generation skills (Analytics query generation and Analytics hidden insights generation)	✓	
Activate and configure AI Data Explorer skills (Analytics exploration, Exploration	✓	

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Capability	now_assist_explor	sn_apm.apm_read	sn_apm.apm_write	now_assist_explor	Notes
summarization, Refine text in exploration, Data visualization generation)					
Configure AI Search for dashboard insight generation		✓			

ADR doc summarization and actions

ADR skills are powered by the ADR Doc Summarization and Actions skill. The skill must be activated by an admin before use.

Capability	now_assist_explor	sn_apm.apm_read	sn_apm.apm_write	now_assist_explor	Notes
Generate a ServiceNow Otto® summary of an ADR document from the Artifact content tab			✓		
Elaborate selected text in an ADR document			✓		
Shorten selected text in an ADR document			✓		
Summarize selected text in an ADR document			✓		
Use the Refine button to further elaborate or shorten generated content			✓		
Insert generated content into the ADR record; copy generated summary text			✓		
Use the ADR summarization skill				✓	sn_apm.apm_read is in the default skill access list. Admins can modify role access from the ServiceNow Otto® Admin console.

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Business application insights

The business application insights skill generates context-aware summaries and actionable insights for business applications. Insights automatically include contextual data from the page where they are generated.

Capability	now.assist_explorer.app	now.assist_explorer.app_portfolio	now.assist_explorer.app_rationalization	now.assist_explorer.app_rationalization_list	now.assist_explorer.app_rationalization_side_panel	Notes
Generate insights from the business application details page			✓			Available when the skill trigger is set to **User trigger**.
View insights that are generated automatically when you open a business application record page, when the skill trigger is set to **Automatic**			✓			
Generate context-aware insights from the Business Portfolio page (capability context, cross-capability impact, indicator scores, fiscal period)			✓			
Generate context-aware insights from the Application Rationalization bubble chart (axis metrics, quadrant position, bubble size metric, planned disposition, fiscal period)			✓			
Generate context-aware insights from the Application Rationalization list view (indicator scores, actual scores, fiscal period, connected demands)			✓			
View insights in a side panel wherever business application details are shown			✓			
Refresh generated insights after updating business application data			✓			
Provide thumbs up or thumbs down feedback on generated insights			✓			

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Compare Enterprise Modeling and Visualization diagrams

The diagram change analysis skill generates an AI summary of changes between two diagram versions. The summary includes an executive overview and a breakdown of added, modified, and removed shapes and relationships.

Capability	nor	assist_explor	apm	apm	assist_explor	Notes
Select two diagram versions to compare from the Compare versions pop-up window			✓	✓		Both sn_apm.apm_user and sn_apm.apm_read are required. Neither role alone is sufficient to use this skill.
View the AI-generated executive summary of changes between two diagram versions			✓	✓		Both sn_apm.apm_user and sn_apm.apm_read are required.
View a breakdown of shapes, entities, and relationships that have been added, modified, or deleted			✓	✓		Both sn_apm.apm_user and sn_apm.apm_read are required.
View visual canvas highlights (new shapes and lines in green, modified in yellow)			✓	✓		Both sn_apm.apm_user and sn_apm.apm_read are required.
Change the diagram versions and regenerate the comparison summary			✓	✓		Both sn_apm.apm_user and sn_apm.apm_read are required.
Refresh the summary after changing the primary diagram version			✓	✓		Both sn_apm.apm_user and sn_apm.apm_read are required.

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Capability	now_assist_explorer_user	sn_apm.apm_user	sn_apm.apm_read	now_assist_explorer	Notes
Copy the generated change summary; provide helpful or not helpful feedback		✓	✓		Both sn_apm.apm_user and sn_apm.apm_read are required.

Elaborate or shorten content in form fields (Refine text)

The Refine text skill is available in the Description and Reasoning fields on forms for business applications, business capabilities, business processes, value stream stages, and information objects.

Capability	now_assist_explorer_user	sn_apm.apm_user	sn_apm.apm_read	now_assist_explorer	Notes
Elaborate or shorten text in the Description field of a business application		✓			
Elaborate or shorten text in the Description field of a business capability, business process, value stream stage, or information object		✓			
Generate reasoning content for the Reasoning field (Planned Disposition section) of a business application by entering prompts in the text box		✓			
Elaborate or shorten existing text in the Reasoning field		✓			

Generate insights for EA Workspace dashboard widgets

The dashboard insights feature uses the AI Data Explorer and Query Generation skills to provide a conversational interface for querying and analyzing EA Workspace dashboard data. Both an EA Workspace role and the now_assist_explorer_user role are required.

Capability	now_assist_explorer_user	sn_apm.apm_user	sn_apm.apm_read	now_assist_explorer	Notes
Use the Explore with AI icon on any supported dashboard widget to open the AI Data Explorer		✓	✓	✓	Requires an EA Workspace role (sn_apm.apm_user or sn_apm.apm_read) AND now_assist_explorer_user. AI Data Explorer

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Capability	now_assist_explorer_user	sn_aia.admin	sn_aia.user	sn_aia.approver	now_assist_explorer_admin	Notes
						and Query Generation skills must be activated and AI Search must be configured.
Ask natural language questions about data from a single dashboard widget			✓	✓	✓	Requires EA Workspace role AND now_assist_explorer_user.
Perform trend analysis queries (for example, how application counts changed over time)			✓	✓	✓	Requires EA Workspace role AND now_assist_explorer_user.
Perform comparative queries (for example, application counts across different technology types)			✓	✓	✓	Requires EA Workspace role AND now_assist_explorer_user.
Perform specific metric queries (for example, which application family is most used)			✓	✓	✓	Requires EA Workspace role AND now_assist_explorer_user.
Use Standard analysis or Extended analysis mode			✓	✓	✓	Requires EA Workspace role AND now_assist_explorer_user.
Add the widget data to an exploration for ServiceNow Otto® to generate its own insights			✓	✓	✓	Requires EA Workspace role AND now_assist_explorer_user.
Define a goal to improve the quality of generated insights; ask follow-up questions based on ServiceNow Otto® suggestions			✓	✓	✓	Requires EA Workspace role AND now_assist_explorer_user.
Summarize generated insights; share, duplicate, or delete generated insights			✓	✓	✓	Requires EA Workspace role AND now_assist_explorer_user.

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Generate enterprise architecture diagram skill

The Generate enterprise architecture diagram skill uses an AI agent to create Enterprise Modeling and Visualization diagrams from an uploaded image. After the diagram is generated, you can review the result in split-screen mode, where shapes with a low confidence are highlighted for review. You can accept or replace individual low-confidence shapes, then publish the diagram or discard it entirely.

Capability						Notes
Activate and configure the Generate enterprise architecture diagram skill	✓					
Upload an image and invoke the skill to generate an enterprise architecture diagram via the ServiceNow Otto panel			✓			
Review the AI-generated diagram in split-screen mode, with the uploaded image displayed alongside the generated diagram canvas			✓			
Identify and replace low-confidence shapes highlighted on the diagram canvas; accept an individual shape replacement to remove the highlight and reduce the low-confidence count			✓			
Select Accept All to accept all shape replacements and move the diagram to draft state			✓			
Select Discard to delete the AI-generated diagram, including the artifact, version, attachment, and diagram instance			✓			A confirmation dialog is shown before the diagram is deleted.

Enterprise Architecture Explorer Query Agent

The Enterprise Architecture Explorer query agent is an agentic ServiceNow Otto® skill that answers natural language questions about EA portfolio data. This includes business applications, capabilities, value streams, technology standards, and information objects. The agent is accessed from the ServiceNow Otto panel in Enterprise Architecture Workspace.

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Capability						Notes
Ask natural language questions about EA portfolio data using the ServiceNow Otto panel in Enterprise Architecture Workspace			✓			
Query EA data across business applications, capabilities, value streams, TRM, information objects, and technical debt; query TCO on non-BA entities (capabilities, information objects, value streams, application services, and business services) by rolling up through associated business applications			✓			
Apply multiple filter conditions and compare trends in a single question			✓			
Ask follow-up questions within the same session without restating context; select suggested follow-up questions generated by the agent			✓			
Ask about the impact of an infrastructure configuration item (CI), such as a database, database instance, server, or storage device, and about the infrastructure that a business application or application service depends on			✓			

Conversational experience (Virtual Agent)

The conversational experience skills let any authenticated user register business applications or digital integrations through a natural language chat interface in any application that supports Virtual Agent. No EA Workspace role is required.

Capability						Notes
Register a business application through Virtual Agent by providing details such as name, description, IT owner, business owner, category, and application type						No role required. Any authenticated user can access this skill. A Virtual Agent-enabled application such as the Employee

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Capability	nowassist_explorer_admin	nowassist_explorer_user	nowassist_explorer_app_admin	nowassist_explorer_app_user	nowassist_explorer	Notes
						Center must be installed. The conversational experience must be configured by an admin.
Register a digital integration through Virtual Agent by providing details such as subscriber business application, provider digital interface, IT owner, and description						No role required. Any authenticated user can access this skill. A Virtual Agent-enabled application must be installed and configured by an admin.
Use short or elaborate natural language instructions — Virtual Agent maps the provided context to the appropriate catalog item fields automatically						No role required.
Skip non-required fields during the conversational registration flow						No role required.
Review and modify the auto-populated form fields before submission						No role required.

Related topics

- Configure ServiceNow Otto for Enterprise Architecture (EA)
- Configure AI Data Explorer and Query Generation skills
- ServiceNow Otto for Enterprise Architecture (EA)
- Enterprise Architecture Workspace access roles
- Enterprise Architecture AI agent diagramming agentic workflow
- Exploring Enterprise Architecture query agent
- Working with Enterprise Architecture query agent
- Create a business process map diagram from an image
- Review an AI-generated business process map diagram
- Generate a summary for Architectural Decision Records (ADRs)
- Elaborate or shorten content in ADRs
- Generate insights into business applications
- Compare Enterprise Modeling and Visualization diagrams

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Elaborate or shorten content in form fields

Generate insights for Enterprise Architecture Workspace dashboard widgets

Register a business application conversationally

Register a digital integration conversationally

Tables installed with Enterprise Architecture Workspace

The following tables are added with activation of Enterprise Architecture Workspace.

Installed tables

Table	Description
Certifications Elements [cert_element]	Stores quarterly or on-demand certifications for business applications.
Follow On Tasks [cert_follow_on_task]	Stores follow-up tasks for the following: • Business applications not related to a business capability • Orphan business capabilities • Information objects not related to any business application • Software models with no life-cycle data • Business applications not related to any software models • Hardware models with no life-cycle data • Business applications not related to any hardware models
Software Model Risks [sn_apm_tpm_software_model_risk]	Stores software models that are at risk.
Software Risk Parameter Scores [sn_apm_tpm_risk_param_score]	Stores software models that are nearing their end of life.
Hardware Model Risks [sn_apm_tpm_hardware_model_risk]	Stores hardware models that are at risk.
Hardware Risk Parameter Scores [sn_apm_tpm_hm_risk_param_score]	Stores hardware models nearing their end of life.
TPM Discovered Technologies [sn_apm_tpm_discovered_technology]	Stores hardware and software elements in your enterprise.
TPM Technology Lifecycle [sn_apm_tpm_technology_lifecycle]	Stores the technology life cycles associated with the discovered technologies.
TPM Technology Lifecycle Exception [sn_apm_tpm_technology_lifecycle_exception]	Stores the life cycles that were approximated or couldn't be found from ServiceNow® Software Asset Management Professional or ServiceNow® Hardware Asset Management Professional.
TPM Discovered Technology Run Log [sn_apm_tpm_discovered_technology_run_log]	Stores when ServiceNow® Technology Lifecycle Management (TPM) refreshed

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Table	Description
	its contents against Software Asset Management Professional and Hardware Asset Management Professional.
TPM Technology Risk [sn_apm_tpm_technology_risk]	Stores the TPM technology risk information.

Related topics

Install Enterprise Architecture Workspace

Granular admin role changes in Enterprise Architecture

Understand the transition from global admin usage to feature-specific granular admin roles, outlining the intent, architectural principles, and governance expectations defined by the Granular Admin Directive.

Enterprise Architecture now standardizes on granular admin roles to ensure controlled, least-privilege access while preserving backward compatibility for existing customers.

What changed

The global `admin` role is no longer referenced directly by application features or capabilities. Instead,

- Ff\eature-specific granular admin roles are introduced (for example, sn_apm.apm_admin, cost_transparency_analyst).
- Application modules, system properties, and applications reference only granular roles
- The `admin` role continues to function through role inheritance, ensuring upgrade safety and non-breaking behavior.

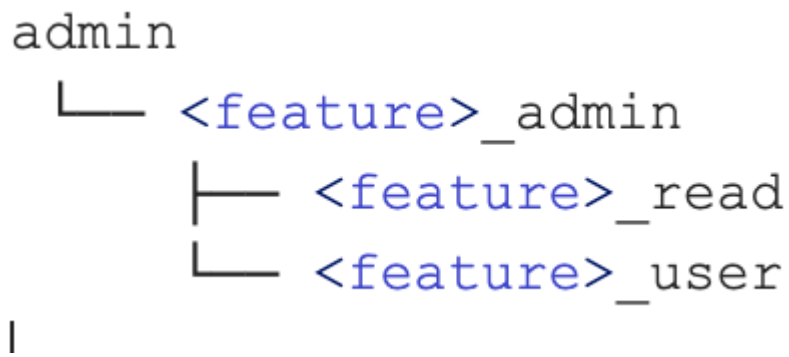
Why this change

Direct usage of the `admin` role for feature administration resulted in:

- Over-privileged access models
- Increased security risk
- Tight coupling between unrelated features
- Limited ability to delegate administration safely
- Granular admin roles address these concerns by:
  - Enforcing least-privilege architecture principles
  - Improving security and auditability
  - Enabling user-controlled delegation
  - Preserving backward compatibility during upgrades

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Standard role pattern



- `<feature>_admin` – Full administrative control for a specific feature or capability
- `<feature>_read` – Read-only access for operational or reporting use
- `<feature>_user` – Standard usage access

Example granular roles for Enterprise Architecture

- `sn_apm.apm_admin` – Administers Enterprise Architecture features and configurations
- `sn_apm.apm_read` – Read-only access to Enterprise Architecture data
- `sn_apm.apm_user` – Standard Enterprise Architecture user access

Related topics

Install Enterprise Architecture Workspace

Application plugin installation sequence for Enterprise Architecture Workspace

Activate the required plugins and optional add-ons in the correct order to confirm all *`Enterprise Architecture Workspace`* features are available on your instance.

Enterprise Architecture Workspace application plugin list

The *`Enterprise Architecture Workspace`* consists of a core plugin and several feature plugins and optional add-ons. Some features only become available when their dependent plugins are active at the time of activation.

Loading the core plugin before feature plugins and optional add-ons confirms that all functionalities are initialized properly.

Note: Activating plugins out of order can cause features to appear missing after activation — with no error message to indicate the cause. Follow the sequence in this topic to avoid this.

You must have the admin role to activate plugins and store apps. Verify that your instance is on a supported release for the plugins you plan to activate.

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Plugin activation sequence

EA Workspace plugin activation sequence

#	Plugin ID	Display name	Required	What it enables
Core				
1	com.snc.apm_core	Enterprise Architecture Core	Yes	Base data model. Activate first.
2	com.snc.apm	Enterprise Architecture	Yes	Core plugin. All other EA plugins depend on this.
3	com.snc.apm_read_roles	Read-only Roles for EA	Yes	Read-only access roles. Activate before assigning roles to users.
4	sn_4_q_bubble	Four-Quadrant Bubble Chart	Yes	UI component required by the workspace. Must be active before #5.
5	com.snc.apm_workspace	*Enterprise Architecture Workspace*	Yes	Main workspace UI. Requires #1–4 to be active first.
Feature plugins — activate after core (#1–5) in any order				
6	`com.snc.apm_trm`	*TRM*	Yes	Technology reference model, lifecycle tracking, and technical debt calculation. Activate before TLM (#7).
7	com.snc.apm_tpm	*Technology Lifecycle Management*	Yes	Software lifecycle data, capability scores, and software model mapping in the workspace. Activate after TRM (#6).
8	com.snc.apm_tco	Total Cost of Ownership	No	TCO cost data on application records.
9	com.snc.apm_digital_integration	Digital Integration Management	No	Digital integration entities. If you plan to use Enterprise Modeling and Visualization (#15–17), activate this plugin first.
10	com.snc.apm_cloud_readiness	Cloud Readiness Assessment	No	Cloud readiness scoring on application records.
GRC integration — activate the platform plugin before the EA plugin in each pair				
11	com.sn_risk_advanced	Advanced Risk Management	No	Platform plugin. Required before #12.
12	com.snc.apm_risk_assessment	Risk Assessment for EA	No	Risk Assessment section on Business Application records and in diagrams.
13	com.sn_compliance	Compliance	No	Platform plugin. Required before #14.

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EA Workspace plugin activation sequence (continued)

#	Plugin ID	Display name	Required	What it enables
14	com.snc.apm_control_management	Control Management for EA	No	Controls section on Business Application records and in diagrams.
Enterprise Modeling and Visualization — activate in this exact order after core and feature plugins				
15	com.sn_apm_diagram_builder	APM Diagram Builder	No	Diagram builder engine. Required before #16–17.
16	com.snc.apm_modelling_foundation	*Enterprise Modeling and Visualization* Common	No	Base data model for diagrams. Required before #17.
17	com.snc.apm_modelling_ui	*Enterprise Modeling and Visualization*	No	Diagramming and modeling capabilities in the workspace.
Optional add-ons — activate at any point after their listed prerequisites				
18	com.snc.apm_ppt_export	PPT Export for EA	No	PowerPoint export from the workspace. Requires #5.
19	com.snc.sn_lucidchart_integration	*Lucidchart* Integration	No	Lucidchart diagram integration. Requires IntegrationHub to be active first.
20	com.sn.lucidchart.spoke	*Lucidchart* Diagramming Spoke	No	Lucidchart spoke actions in Flow Designer. Requires IntegrationHub to be active first.
21	com.snc.pa.apm	Performance Analytics for APM	No	Performance Analytics dashboards for EA. Requires Performance Analytics to be active.
22	com.snc.pa.apm.change_request	Performance Analytics for APM – Change	No	Change request analytics for EA. Requires #21.
23	com.snc.pa.apm.problem	Performance Analytics for APM – Problem	No	Problem analytics for EA. Requires #21.
24	com.snc.apm.predictive_intelligence	EA – Predictive Intelligence	No	Predictive Intelligence features for EA. Licensable.

Post-activation checklist

After activating all required plugins and any optional add-ons, verify that the expected features are available.

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- Go to **Workspaces** > **Enterprise Architecture Workspace**. The workspace opens without errors.
- The Application Rationalization bubble chart is visible.
- The Business Applications list populates with data.
- The Capability Heatmap renders correctly.
- If TLM (#7) is active, lifecycle data is visible on application records and capability scores display in the Business Capability Hierarchy.
- If Enterprise Modeling and Visualization (#15–17) is active, the **Modeling and Visualization** section is available in the workspace navigation and EA entity shapes appear in the diagram shape library.

Resolving missing features

If a feature is missing after activation, use the following table to identify the cause and resolve it.

Activation issues and resolutions

Missing feature	Likely cause	Resolution
Bubble Chart page is blank or missing	The Four-Quadrant Bubble Chart plugin was not active when the workspace was activated	Reactivate com.snc.apm_workspace after confirming sn_4_q_bubble is active.
Risk Assessment section missing from workspace	Advanced Risk Management was not active before Risk Assessment for EA was activated	Activate com.sn_risk_advanced, then reactivate com.snc.apm_risk_assessment.
No entity shapes in diagram editor	Enterprise Architecture Core was not active when Enterprise Modeling and Visualization was activated	Confirm com.snc.apm is active, then reactivate com.snc.apm_modelling_tool.
Digital Integration shapes missing from diagrams	Digital Integration Management was activated after Enterprise Modeling and Visualization	Activate com.snc.apm_digital_integration, then reactivate com.snc.apm_modelling_tool_common.
Lucidchart spoke actions missing in Flow Designer	IntegrationHub was not active before the Lucidchart spoke was activated	Activate IntegrationHub, then reactivate com.sn.lucidchart.spoke.
Architectural Documents section missing	The Document Management platform plugin was not active whenEnterprise Architecture was activated	Activate com.snc.platform_document_management, then reactivate com.snc.apm.
Now Assist buttons not visible in the workspace	The ServiceNow Otto for Enterprise Architecture (EA) plugin is not active	Activate sn_apm_gen_ai.

Related topics

Install Enterprise Architecture Workspace

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Enterprise Architecture (EA) and the CSDM framework

Use Enterprise Architecture to gain a comprehensive understanding of your organization's applications so you can identify redundancies and decrease budgetary costs. The goal of this product view is to help you to understand how Enterprise Architecture key entities work with the core CSDM framework.

Note: If you do not use CSDM 5.0 or later versions, see the Rome documentation for CSDM. For implementing CSDM framework, see Implementing the CSDM framework in stages.

Enterprise Architecture home page

Important:

Starting with the Xanadu release, the legacy Enterprise Architecture (formerly Application Portfolio Management) Home page has been deprecated. However, if you are an existing user of Enterprise Architecture (formerly Application Portfolio Management), you can still view the legacy Home page. If you are a new activation user, the legacy Home page is not available.

You can leverage the same features provided by the Application Portfolio Management Home page by using the Enterprise Architecture Workspace Home page. To learn more about Enterprise Architecture Workspace, see Enterprise Architecture Workspace.

The Enterprise Architecture home page organizes many of the CSDM tables used by Enterprise Architecture.

Business Portfolio

View the number of defined business capabilities that have been or will be assessed, and the number of business applications that support capabilities but are at-risk.

For more information about using capability mapping to establish a configuration item (CI) relationship between the business capability and the business applications, see Exploring a business portfolio.

Information Portfolio

Capture the asset information as information objects. You can connect the information object to your business applications to create an application portfolio that you can use at any time.

The information portfolio links to the following data:

- Data Domains: Total number of records in the Data Domain table [sn_apm_data_domain].
- Information Objects: Total number of records in the Information Object table [cmdb_ci_information_object].
- Database Instances: Total number of records in the Database Instance table [cmdb_ci_db_instance].
- Database Catalogs: Total number of records in the Database Catalog table [cmdb_ci_db_catalog].

For more information about the information portfolio and the information portfolio model, see [product].

Application Portfolio

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Track the applications that support your business capabilities and effectively manage them to meet the goals of your organization. The portfolio provides a list of applications with information such as their category, manufacturer, and type. Select **Applications** to navigate to the list view of business applications in your organization.

For more information about measuring the usability, cost, quality, performance, and risk of applications, see [product].

Technology Portfolio

Use metrics to measure the usability, cost, quality, performance, and risk of applications.

For more information about technology portfolio management and how it relates to business applications, see Exploring Technology Lifecycle Management (TLM) in Enterprise Architecture Workspace.

Related topics

Exploring the CSDM model

Enterprise Architecture and CSDM tables

Enterprise Architecture manages and uses CSDM tables. Several ServiceNow products benefit from and add value to Enterprise Architecture.

CSDM tables managed by Enterprise Architecture

1. Business Capability table [cmdb_ci_business_capability]
2. Business Application table [cmdb_ci_business_app].

Note:

Enterprise Architecture uses the **Platform** and **Platform App** fields on the Business Application table to establish the relationship between a business application and the underlying application service. Enterprise Architecture manages the Platform Host / Platform App relationship using a reference on the Enterprise Architecture form, not through a CI relationship.

The relationship connects the record of the business application that is used in planning and design with where and how it's realized operationally, represented by application services. The relationship accounts for each use of a business application in the development, test, and production environments (dev, test, and prod application service instances). Often there are multiple production deployments. For example, a large retailer uses a business application that runs a cash register in each of its 1,000 stores. There are therefore 1,000 production instances of the application service — one per store — for that one business application. See the "CSDM in a nutshell" video for additional discussion of the relationship.

3. Information Object table [cmdb_ci_information_object]

Products that add value to Enterprise Architecture

When you use Enterprise Architecture with any of the following ServiceNow products, you increase the value you get from Enterprise Architecture:

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- Discovery provides details about the hardware and software CIs you are using.
- Service Mapping provides details about the application instance service in the [cmdb_ci_service_discovered] table, relating infrastructure and application [cmdb_ci_appl] CIs.
- Asset Management provides the related product model. Software Asset Management (SAM Foundation) and Hardware Asset Management (HAM) provide life-cycle data for Technology Lifecycle Management.
- Project Portfolio Management views the business application roadmaps. Includes demands, projects, sprints and epics.
- Agile Development views the backlog stories and epics of each business application in the application roadmap.

Products that benefit from Enterprise Architecture

The following ServiceNow products gain value from Enterprise Architecture:

- IT Service Management (ITSM): Services have the context of the business and applications, along with the information and technologies layered beneath them.
- Information Technology Operations Management (ITOM): Understands the business context for the application services along with the hardware and software being managed.
- Governance, Risk, and Compliance (GRC): Auditors can leverage the business applications and related information objects. This helps auditors understand the design-time data sensitivity for scoping audits, measuring risks, and managing audit activities.
- Asset Management: Manages the software and hardware life cycles for business applications and business services.

Related topics

Exploring the CSDM model

Enterprise Architecture use case

Enterprise Architecture lets you define a single, version-agnostic entity that represents all instances, technologies, and data used for planning and reporting.

Important:

Starting with the Xanadu release, most Enterprise Architecture (formerly Application Portfolio Management) capabilities are available through the Enterprise Architecture Workspace.

Features such as data certification, application assessments, and total cost of ownership (TCO) are now accessed and managed from the Enterprise Architecture Workspace, not from the legacy APM pages. To learn more about Enterprise Architecture Workspace, see Enterprise Architecture Workspace.

Enterprise Architecture use case

You can use a business application for planning and governance activities, such as funding, road mapping, and risk reporting. Rationalizing business applications is a continuous process, and is critically important to reducing costs and planning technology transformations. Rationalizing business applications is also critical for completing mergers, divestitures, or other broad-impact business-led changes.

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Key features of the Enterprise Architecture use case

The CMDB, when used by the CSDM framework, provides value to Enterprise Architecture in the following ways:

- Application life cycle management. This includes:
  - Registering a new business application (included in the base system).
  - Updating a business application
  - Decommissioning a business application, including all the related application services and infrastructure. Because application services are logical in nature, they should use the Logical life cycle states. Application services follow the same life cycle guidance as any other logical CI.
- Business application portfolio assessments based on metrics or related impacts.
- Roadmap planning and creating new ideas, demands and projects.
- Data certification process
- Total cost of ownership (TCO) calculations (using the Financial Management module)
- Manage the following related entities:
  - Information objects table [cmdb_ci_information_object]
  - Business capabilities table [cmdb_ci_business_capability]

Results of the Enterprise Architecture use case

With this use case, CSDM provides Enterprise Architecture a consistent way to model business applications and relate critical data. The use case ensures that the application services (instances) are defined as required for automating the technology risk scores, costs, and other metrics used for analysis.

TLM use case

TLM gives you a better understanding of the risks associated with using software and hardware that is at the end-of-life (EOL) date. You can use the details provided by the CSDM framework to determine the risk of using software and hardware that is at EOL. Each product life cycle EOL date is calculated, then combined following the CSDM framework to provide a score at the Business Application level.

Results of the TPM use case

The CSDM framework provides a consistent data structure. This consistent data structure makes it easier for you to manage the life cycles of your technology and analyze the combined technology risks.

Because of the way the CSDM framework is structured, you can leverage many products from ITOM, Service Management (Service Portfolio Management), and IT Application Management (ITAM).

The risks of using EOL technologies are calculated based on the life cycle of each software and hardware product model identified in the CMDB.

You can enter the life-cycle data manually, import it from an external source, or use the data provided with your Software Asset Management Professional or Hardware Asset Management license.

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The risks are calculated and displayed in a hierarchy. Business application is at the top level, SDLC Components are under the business application, then Application Services indicate each deployment (instance), and software and product models are at the lowest level. Risks are calculated in the order shown below, and are based on the time span between the current date and the EOL date.

Note: Configuring SDLC component is optional. Even without SDLC component configuration, you can connect business applications with the application services directly.

1. Hardware and software product model — Displays the current life-cycle phases, sources, and indicates the specific models at-risk
2. Application Service level — Displays the combined risk status of all underlying hardware and software product models used in the Application Service (Instance).
3. SDLC Component — Displays the SDLC components along with the associated application services and business applications
4. Business application level — Combines all the underlying Application Service (Instances) to determine the overall risk rating at a portfolio level.

The following information is used to determine the EOL impact to business applications and their installed application services (instances):

- The business applications used in your organization are all linked to one or more application services. Each of the application services run on one or more technologies or software models.

  The name of the Application Service Software model table is [sn_apm_tpm_service_software_model].

- The software model has a sequence of life-cycle stages. The life-cycle stages range from the installation date to the retirement date.

  Some business organizations set an internal date based on the life-cycle phase of the software models. These software model phases can be Early Adopter, Mainstream, Declining use, and Retired.

  Similarly, the software vendors might also set a date for the software based on the vendor life-cycle phases, such as Pre-release, General Availability, End of Life, and Obsolete. Vendor support might vary depending on the phase of the technology. For example, when the software model reaches the Obsolete phase, the vendor might stop supporting the technology.

  The Software Model Life cycle table is named [sam_sw_model_lifecycle].

Enterprise Architecture considerations

Consider these points while implementing the CSDM framework.

- Business services are what IT provides to the customer. A business service is a service type that is published to business users. A business service typically implements one or more business capabilities.

  Usually, business users order business services. Business users can select the desired offering and service commitment levels via the Service Catalog. For example, procurement, shipping, and finance.

  - A business service is an operational CI.
  - A business service must be a one-level service and not a hierarchy of business services.

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- A business service can be used for impact in Incident, Problem, and Change and for approvals for Change.
- A business service must be focused on the consumer or seller.

- A business capability is a high-level capability that supports a business model or fulfills a mission for your organization.

  A business capability typically describes a specific task that achieves one or more business outcomes. Business capabilities are often listed as verbs (for example, manage financials or provide IT support services). You can use business capabilities to rationalize and prioritize the cost of business applications and business services.

- Using Technology Lifecycle Management: The Basic Software Asset Management provides life-cycle data that Technology Lifecycle Management uses. However, you can manage that data manually or get it from another source. Both products share the underlying tables, but are independent and you can use them separately.
- For information about managing your application portfolio, see Application Portfolio Management - Inventory Best Practices.
- Applications and business applications use different tables and represent different elements.

  Business application

  - Uses the Business Application table [cmdb_ci_Business_App].
  - Represents the single, logical, construct of the application that comprises application service, environment, software, and hardware in use.

  Application

  - Uses the Application table [cmdb_ci_appl].
  - Represents the specific version of software in use on a server (often populated by Discovery or System Center Configuration Manager (SCCM)).

For additional information about Enterprise Architecture, see APM: Application Inventory - Most common questions.

Personalize the Enterprise Architecture Workspace home page

Customize the sections that you want visible on the home page by using the personalize page feature.

Before you begin

You must have Enterprise Architecture Workspace version 2.2.0 to personalize the Enterprise Architecture Workspace home page.

Role required: sn_apm.apm_analyst

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Select the hide sections icon () to open the Personalize Page window.
3. Use the toggle switches next to the relevant section names to conceal or display a particular section from the home page.
4. Select **Apply**.

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Show or hide sections on the home page of the EA Workspace

Customize your workspace to display the components that you want to see.

Before you begin

Role required: sn_apm.apm_admin and sn_apm.apm_user

About this task

For the Insights, Overview, and Health sections, you can hide some components if you don't intend to use them.

Procedure

1. Navigate to **All** > *Enterprise Architecture* > **Enterprise Architecture Workspace** > **Configuration**.
2. On the APM EA Configurations page, select an item that you want to hide or show.
3. In the Active column, select **True** or **False** to show or hide the component in the workspace.

> **Note:** You can create a visualization configuration using the Platform Analytics Workspace. For instructions, see Create a single score visualization in the Visualization Designer.

Create and apply a configuration for the Overview section

Create visualization configurations for the Portfolio Overview section and apply them as needed.

Before you begin

Role required: sn_apm.apm_admin

Procedure

1. Navigate to **All** > *Enterprise Architecture* > **Enterprise Architecture Workspace** > **Configuration**.
2. On the APM EA Configurations page, select **New**.
3. On the form, fill in the fields.

EA Configuration Record form

Field	Description
Name	Name of the configuration.
Active	Option to make the configuration active to appear on the Overview section.
Section	Section name for which you're creating the configuration.
Order	Position of the card in the sequential order of all other cards in that section.
Configuration Type	Type of the configuration. If the **Section** field is set to **Overview**, then this field value is automatically set to **Visualization**.
Saved Visualization	Name of the configuration. Select the lookup icon () to select a configuration from the PAR Visualizations list.

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Field	Description
	Note: You can create and save a visualization configuration using the Platform Analytics Workspace. For instructions, see Create a single score visualization in the Visualization Designer.
Manage Access	Option to provide access to the selected users and user groups. Add users or groups by selecting the lock icon ( ) for **Users** or **Groups**.

Sample Configuration script to add a card (Business applications at the same capability hierarchy level) in the Business Portfolio tab of the Insights section:

```
responseFromScript();

function responseFromScript() {

    return {

   "title":{

      "label":"Test insight card",

      "size":"sm",

      "lines":2

   },

   "count":"6",

   "description":{

      "label":"6 testing description",

      "lines":2

   },

   "countLabel":"test count",

   "buttonLabel":"View list",

   "buttonTooltip":"View list for Business applications at the
 same capability hierarchy level",

   "border":{

      "color":"brown",

      "variant":"secondary"
```

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```
   },
   "highlightedHeader":{
      "label":"Business Portfolio",
      "icon":"bag-outline"
   },
   "navigation":{
      "route":"list",
      "title":"Business applications at the same capability
 hierarchy level",
      "fields":{
         "table":"cert_follow_on_task",
         "listTitle":"Business applications at the same
 capability hierarchy level"
      },
      "params":{
         "query":"sys_created_on>=2022-12-15
 11:36:37^audit.sys_id=ae25162c3ba20300028fe79c83efc492^state=
1",
         "listView":""
      }
   },
   "displayText":"6 Business applications at the same
 capability hierarchy level"
};
}
```

4. Select **Submit**.

Configure the Health or Insights section

Create configurations for the Health or Insights section and apply them as needed.

Before you begin

Role required: sn_apm.apm_admin

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Procedure

1. Navigate to **All** > *Enterprise Architecture* > **Enterprise Architecture Workspace** > **Configuration**.
2. On the APM EA Configurations page, select **New**.
3. On the form, fill in the fields.

EA Configuration Record form

Field	Description
Name	Name of the configuration.
Active	Option to make the configuration active to appear on the Health or Insights section.
Section	Section name for which you're creating the configuration.
Order	Position of the card in the sequential order of all other cards in that section.
Configuration Type	Type of the configuration. If the **Section** field is set to any of the following, then this field value is automatically set to **Script**. ○ Health ○ Insights - Application Portfolio ○ Insights - Business Portfolio ○ Insights - Information Portfolio ○ Insights - Technology Portfolio
Configuration Script	Script of the configuration.
Manage Access	Option to provide access to the selected users and user groups. Add users or groups by clicking the lock icon for **Users** or **Groups**.

Sample Configuration script to add a card (Business Capabilities not Assessed) in the Health section:

```
function responseFromScript(filters) {

  return {"count":74,"percentage":"45","subtext":"45% of all
 Capabilities","query":"sys_idIN016d2c3d18400300964f2ff0d21a4ee
4,016d2c3d18400300964f2ff0d21a4eeb,016d6c3d18400300964f2ff0d21a
4e00,016d6c3d18400300964f2ff0d21a4e0b,016d6c3d18400300964f2ff0d
21a4e0e,056d2c3d18400300964f2ff0d21a4ee2,056d2c3d18400300964f2f
f0d21a4ee9,056d2c3d18400300964f2ff0d21a4ef7,056d6c3d18400300964
f2ff0d21a4e13,096d2c3d18400300964f2ff0d21a4ee0,096d2c3d18400300
964f2ff0d21a4ef5,096d2c3d18400300964f2ff0d21a4efc,096d6c3d18400
300964f2ff0d21a4e03,0d6d2c3d18400300964f2ff0d21a4ee5,0d6d2c3d18
400300964f2ff0d21a4eec,0d6d2c3d18400300964f2ff0d21a4efa,0d6d6c3
d18400300964f2ff0d21a4e08,116d6c3d18400300964f2ff0d21a4e23,156d
6c3d18400300964f2ff0d21a4e21,343ab8b1c172d700964f1c9d9204dfc4,3
df0ce8111f01300964fb19f04b5016c,3eaa906187082110cb387406dabb350
2,416d2c3d18400300964f2ff0d21a4eee,416d2c3d18400300964f2ff0d21a
4efc,416d6c3d18400300964f2ff0d21a4e03,416d6c3d18400300964f2ff0d
```

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```
21a4e0a,456d2c3d18400300964f2ff0d21a4ef3,4ad8bca987482110cb3874
06dabb3548,4d6d2c3d18400300964f2ff0d21a4ef6,596d6c3d18400300964
f2ff0d21a4e22,5d6d6c3d18400300964f2ff0d21a4e19,816b418b876f1110
cb387406dabb3548,816d2c3d18400300964f2ff0d21a4eea,816d2c3d18400
300964f2ff0d21a4ef8,816d2c3d18400300964f2ff0d21a4eff,856d2c3d18
400300964f2ff0d21a4ee1,856d2c3d18400300964f2ff0d21a4ee8,856d2c3
d18400300964f2ff0d21a4ef6,896d2c3d18400300964f2ff0d21a4ee6,896d
2c3d18400300964f2ff0d21a4ef4,896d6c3d18400300964f2ff0d21a4e02,8
96d6c3d18400300964f2ff0d21a4e09,896d6c3d18400300964f2ff0d21a4e1
0,8d6d2c3d18400300964f2ff0d21a4ee4,8d6d2c3d18400300964f2ff0d21a
4eeb,8d6d2c3d18400300964f2ff0d21a4ef2,8d6d2c3d18400300964f2ff0d
21a4ef9,8d6d6c3d18400300964f2ff0d21a4e00,916d6c3d18400300964f2f
f0d21a4e22,956d6c3d18400300964f2ff0d21a4e19,a770d85187046110cb3
87406dabb3540,c16d2c3d18400300964f2ff0d21a4eed,c16d2c3d18400300
964f2ff0d21a4ef4,c16d2c3d18400300964f2ff0d21a4efb,c4c7273087442
110cb387406dabb3520,c56d2c3d18400300964f2ff0d21a4ee4,c56d2c3d18
400300964f2ff0d21a4eeb,c56d6c3d18400300964f2ff0d21a4e00,c56d6c3
d18400300964f2ff0d21a4e0e,c96d2c3d18400300964f2ff0d21a4ee2,c96d
2c3d18400300964f2ff0d21a4ee9,c96d2c3d18400300964f2ff0d21a4ef0,c
96d2c3d18400300964f2ff0d21a4efe,c96d6c3d18400300964f2ff0d21a4e0
5,c96d6c3d18400300964f2ff0d21a4e13,cd6d2c3d18400300964f2ff0d21a
4ee7,cd6d2c3d18400300964f2ff0d21a4eee,d16d6c3d18400300964f2ff0d
21a4e1e,d56d6c3d18400300964f2ff0d21a4e15,d56d6c3d18400300964f2f
f0d21a4e1c,dd026ed887d82110cb387406dabb3548,dd6d6c3d18400300964
f2ff0d21a4e18,ed4b175c87902110cb387406dabb3553,efbf3eb187bb1110
2f631f473cbb3571","table":"cmdb_ci_business_capability","listVi
ew":"business_capability_apm_view","icon":"exclamation Fill"}

}
```

Sample Configuration script to add a card in the Application Portfolio or Business Portfolio or Information Portfolio in the Insights section:

```
months - selected upto months filter

showProd - show only production filter



responseFromScript(months, showProd);



function responseFromScript(months, showProd) {



    var currentDateTime = new GlideDateTime();

    currentDateTime.addMonthsLocalTime(months);

    var queryDate = currentDateTime.getLocalDate();

    var query =
 "technology_lifecycle.earliest_lifecycle_date<=javascript:gs.d
ateGenerate('" + queryDate + "','start')"; if (showProd) {
```

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```
        query = query +
"^business_service.used_for=Production";

    }

    var productInventoryGR = new
GlideAggregate('sn_apm_tpm_discovered_technology');

    productInventoryGR.addEncodedQuery(query);

    productInventoryGR.addAggregate("count(distinct",
'technology_lifecycle.hardware_model');

    productInventoryGR.setGroup(false);

    productInventoryGR.query();

    if (productInventoryGR.next()) {

        hwProductsCount =
productInventoryGR.getAggregate("count(distinct",
'technology_lifecycle.hardware_model');

    }

    if (hwProductsCount > 0) {

        var hpRiskDesc = gs.getMessage("by {0}", [queryDate]);

        return {

            'title': {

                'label': gs.getMessage("Hardware models with
lifecycle risk"),

                'size': "sm",

                'lines': 2

            },

            'count': hwProductsCount,

            'description': {

                'label': hpRiskDesc,

                'lines': 2

            },

            'countLabel': gs.getMessage("Hardware models
count"),

            'buttonLabel': gs.getMessage("View list"),
```

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```
            'buttonTooltip': gs.getMessage("View list for
hardware models with lifecycle risk"),

            'border': this.cardDetails[3].border,

            'highlightedHeader': this.cardDetails[3].header,

            'navigation': {

                "route": "list",

                "title": gs.getMessage("Hardware models with
lifecycle risk"),

                "fields": {

                    "table":
"sn_apm_tpm_discovered_technology",

                    "listTitle": gs.getMessage("Hardware models
with lifecycle risk")

                },

                "params": {

                    "query": query +
"^ORDERBYtechnology_lifecycle.earliest_lifecycle_date",

                    "listView": ""

                }

            },

            'ariaLabel': {

                "aria-label": gs.getMessage("View list for
hardware models with lifecycle risk")

            }

        };

    }

    return false;

}
```

4. Click **Submit**.

Configure EA Workspace using the Setup page

Use the Setup page to configure Enterprise Architecture Workspace.

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Related topics

- Exploring the Setup page in the Enterprise Architecture Workspace
- Working with the Setup page

Configure application categories

An application category is a grouping of applications by their purpose and function, fields, or areas.

You can create an application category or edit an existing one to align it with your business requirements.

Related topics

- Manage application categories
- View all application categories

Add or edit an application category

Each application should have an application category defined. This field is used to describe the purpose of the application, and the key business function this application supports. You can keep the categorization at a high level, like a business function. For example, Sales, HR, Marketing, and Manufacturing.

Before you begin

Role required: sn_apm.apm_admin

Procedure

1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Setup page by selecting the Setup icon .
3. Select the expand row icon ( ) next to **Application Categories**.
4. Select **All**.
5. Add or edit an application category.
   - To add an application category, select **New**.
   - To update details of an existing application category, select the application category.
6. On the form, fill in the fields.

   For field information, see Create application category form.
7. Select **Save**.

Related topics

- View all application categories

Configure application category groups

An application category group is a collection of application categories. Category groups help with the filtering and reporting of the application categories.

You can create an application category groups or edit an existing one to align it with your business requirements.

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Related topics

Manage application category groups

View all application category groups

Add or edit an application category group

Add or edit an application category group and align it with your business requirements. Category groups help with the filtering and reporting of the application categories

Before you begin

Role required: sn_apm.apm_admin

Procedure

1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Setup page by selecting the Setup icon  .
3. Select the expand row icon ( ) next to **Application Category Groups**.
4. Select **All**.
5. Add or edit an application category group.
   - To add an application category group, select **New**.
   - To update details of an existing application category group, select the application category group.
6. On the form, fill in the fields.

   For field information, see Create application category group form.
7. Select **Save**.

Related topics

View all application category groups

Configure application families

An application family is an attribute to group a set of related applications based on manufacturer classification of their products into product suites.

You can add new application families or edit existing application families to simplify your application portfolio and align related apps with your business goals.

Related topics

Manage application families

View all application families

Add or edit an application family

Add or edit an application family and align it with your business requirements.

Before you begin

Role required: sn_apm.apm_admin

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Procedure

1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Setup page by selecting the Setup icon  .
3. Select the expand row icon ( ) next to **Application Families**.
4. Select **All**.
5. Add or edit an application family.
   - To add an application family, select **New**.
   - To update details of an existing application family, select the application family.
6. On the form, fill in the fields.

   For field information, see Create application family form.
7. Select **Save**.

Related topics

View all application families

Configure indicators

Configure application or capability indicators in the Enterprise Architecture Workspace.

You can add a new application or capability indicator or edit existing indicators.

Related topics

Manage indicators

Working with indicators

Add or edit an application indicator

Add or edit an application indicator to assess the application across dimensions such as cost, quality, technical risk, investments, user satisfaction, and business value.

Before you begin

Role required: sn_apm.apm_admin

Procedure

1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Setup page by selecting the Setup icon  .
3. Select the expand row icon ( ) next to **Indicators**.
4. Select **Application Indicators**.
5. Add or edit an application indicator.
   - To add an application indicator, select **New**.
   - To update details of an existing application indicator, select the application indicator.
6. On the form, fill in the fields.

   For field information, see Create indicator form.
7. Select **Save**.

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Related topics

- View all application indicators
- Regenerate application indicator scores on-demand in Enterprise Architecture Workspace
- Activate or turn off an application or capability indicator

Add or edit a capability indicator

Add or edit a capability indicator to access business capabilities within the indicator framework.

Before you begin

Role required: sn_apm.apm_admin

Procedure

1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Setup page by selecting the Setup icon  .
3. Select the expand row icon ( ) next to **Indicators**.
4. Select **Capability Indicators**.
5. Add or edit an capability indicator.
   - To add an capability indicator, select **New**.
   - To update details of an existing capability indicator, select the capability indicator.
6. On the form, fill in the fields.

   For field information, see Create indicator form.
7. Select **Save**.

Related topics

- View all capability indicators
- Activate or turn off an application or capability indicator
- Regenerate capability indicator scores on-demand in Enterprise Architecture Workspace

Activate or turn off an application or capability indicator

Enable or disable application indicators according to your business requirements.

Before you begin

Role required: sn_apm.apm_admin

Procedure

1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Setup page by selecting the Setup icon  .
3. Select the expand row icon ( ) next to **Indicators**.
4. Select **Application Indicators** or **Capability Indicators**.
5. Double-click the Active column value for a particular indicator.
6. Select the relevant state for that indicator.
   Available options:

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- **true**: This state denotes that the indicator is calculated and used in the overall score calculation by fiscal period.
- **false**: This state denotes that the indicator is turned off and isn't used to calculate the overall application score by fiscal period.

7. Select **OK**.

Related topics

Manage indicators

Add or edit an application indicator

Add or edit a capability indicator

Regenerate application indicator scores on-demand in Enterprise Architecture Workspace

Regenerate capability indicator scores on-demand in Enterprise Architecture Workspace

Configure scoring profiles

Scoring profiles help you to evaluate the applications based on various indicators.

You can add a new scoring profile or edit an existing one. You can also attach a profile indicator to a scoring profile.

Related topics

Manage scoring profiles

View all scoring profiles

Add or edit a scoring profile

You can add or edit a scoring profile with new indicators and associate it with the business application. You can also use the same indicators within many scoring profiles, which generate indicator scores unique to that scoring profile. After you create a scoring profile, you have to associate it with indicators.

Before you begin

Role required: sn_apm.apm_admin

Procedure

1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Setup page by selecting the Setup icon  .
3. Select the expand row icon ( ) next to **Scoring Profiles**.
4. Select **All**.
5. Add or edit a scoring profile.
   - To add a scoring profile, select **New**.
   - To update details of an existing scoring profile, select the scoring profile.
6. On the form, fill in the fields.

   For field information, see Create scoring profile form.

7. Select **Save**.

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Related topics

View all scoring profiles

Attach a profile indicator to a scoring profile

You must associate scoring profiles with profile indicators.

Before you begin
Role required: sn_apm.apm_admin

About this task
You can create or update the scoring profile with new indicators and associate it with the business application. You can also use the same indicators within many scoring profiles, which generate indicator scores unique to that scoring profile.

Procedure

1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Setup page by selecting the Setup icon .
3. Select the expand row icon ( ) next to **Scoring Profiles**.
4. Select **All**.
5. Select the scoring profile that you want to associate with a profile indicator.
6. Associate an application indicator on the **Profile Indicators** tab by selecting **New**.
7. On the form, fill in the fields.
   For a description of the field values, see Create profile indicator form.
8. Select **Save**.

Regenerate scoring profile indicator scores on-demand in Enterprise Architecture Workspace

You can update the scoring profile indicator scores on-demand. Updating the scoring profile indicators scores is necessary when the scoring profile is updated with new indicators.

Before you begin
Role required: sn_apm.apm_admin

About this task
On-demand generation of the indicator scores is more efficient than running scheduled jobs, when immediate results for the updated data and conditions, if necessary.

Procedure

1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Setup page by selecting the Setup icon .
3. Select the expand row icon ( ) next to **Scoring Profiles**.
4. Select **All**.
5. Select the scoring profile that you want to generate the indicator score for.
6. Select **Regenerate indicator score**.
   The **Regenerate scores** pop-up window appears.
7. In the **Fiscal Period** box, enter the fiscal period that you want to generate the indicator score for.

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You can also select the lookup using list icon to view the list of available fiscal periods.

8. Select **OK**.
   This action doesn't update the existing capability indicator scores but deletes them and generates new scores.

Configure TRM phases

A Technology Reference Model (TRM) phase represents the status of the application, that is whether the application is approved for use, being evaluated or being scheduled for divestment.

You can add a new TRM phase on edit an existing one.

Related topics

Manage TRM phases

Working with Technology Reference Model (TRM) in EA Workspace

Add or edit a TRM phase

Define your own TRM phase for the TRM products.

Before you begin

You must be part of the Enterprise Architect Group.

Role required: sn_apm.apm_analyst

About this task

The color and shape of a phase are used to represent the phase of the TRM product.

Procedure

1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Setup page by selecting the Setup icon .
3. Select the expand row icon ( ) next to *TRM* **Phases**.
4. Select **All**.

   The following TRM phases are available from the base system:

   - **Approved**: The technology is approved for use.
   - **Approved with Constraints**: The technology can be used within the specified constraints specified in the comments.
   - **Divest**: A decision was taken to divest from the use of the technology.
   - **Evaluation**: This technology is being evaluated and can't be used to production purposes.
   - **Unapproved**: The technology isn't permitted to be used.
5. Add or edit a TRM phase.
   - To add a TRM phase, select **New**.
   - To update details of an existing TRM phase, select the TRM phase.
6. On the form, fill in the fields.
   For field information, see TRM Phase form.
7. Select **Save**.

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Related topics

View all TRM phases

Working with Technology Reference Model (TRM) in EA Workspace

Configure TRM categories

A Technology Reference Model (TRM) category refers to a grouping of TRM software products by their purpose and function.

You can add a new TRM category or edit an existing one.

Related topics

Manage TRM categories

Working with Technology Reference Model (TRM) in EA Workspace

Add or edit a TRM category

Add or edit a TRM category to group the TRM software products.

Before you begin

You must be part of the Enterprise Architect Group.

Role required: sn_apm.apm_analyst

About this task

TRM categories organize technology standards and lifecycles for consistent governance.

You can assign an owner to a TRM category, to ensure clear accountability and improved governance standards. The owner is responsible for maintaining consistent technology compliance standards for that TRM category.

Procedure

1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Setup page by selecting the Setup icon  .
3. Select the expand row icon ( ) next to *TRM* **Categories**.
4. Select **All**.
5. Add or edit a TRM category.
   - To add a TRM category, select **New**.
   - To update details of an existing TRM category, select the TRM category.
6. On the form, fill in the fields.
   For field information, see TRM Category form.
7. Select **Save**.

Related topics

View all TRM categories

Technology Reference Model in Enterprise Architecture Workspace

Working with Technology Reference Model (TRM) in EA Workspace

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Configure information data domains

A data domain is a structured grouping of information objects that are categorized to support business applications and processes. The data domain helps define how business application data is captured and describes how the data is exchanged between applications and databases.

You can add a new information data domain or edit an existing one.

Related topics

Manage information data domains

View information data domains

Add or edit an information data domain

Create or edit an information data domain to logically group related information objects and govern how information is organized and linked to underlying data sources across business applications.

Before you begin

Role required: sn_apm.apm_admin

About this task

A data domain is a collection of information objects. ServiceNow® Discovery finds the database catalog that lists all the catalog objects, or databases, discovered for an instance of a database.

Procedure

1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Setup page by selecting the Setup icon ( ).
3. Select the expand row icon ( ) next to **Information Data Domains**.
4. Select **All**.
5. Add or edit a data domain.
   - To add a data domain, select **New**.
   - To update details of an existing data domain, select a domain, then select **Edit**.
6. On the form, fill in the fields.
   For field information, see Data Domain form.
7. Select **Save**.

Related topics

View information data domains

Configure architectural artifact categories

The architectural artifact categories enable you to categorize and manage artifacts more efficiently. Configuring architectural artifact categories enable you to structure and classify architectural artifacts, and verify the architectural artifacts support strategic goals.

You can add a new architectural artifact category or edit an existing one.

Related topics

Manage architectural artifact categories

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Add or edit an architectural artifact category

Add#or edit an artifact category. Assign the category to an architectural artifact. Categories enable you to categorize and manage artifacts more efficiently.

Before you begin

Role required: sn_apm.apm_admin

Procedure

1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Setup page by selecting the Setup icon ( ).
3. Select the expand row icon ( ) next to **Architectural Artifacts Categories**.
4. Select **All**.
5. Add or edit an architectural artifact category.
   - To add an architectural artifact category, select **New**.
   - To update details of an existing artifact category, select an action, then select **Edit**.
6. On the form, fill in the fields.
   For field information, see Architectural category form.
7. Select **Save**.

Related topics

View all architectural artifact categories

Configure demand actions

Demand actions enable you to initiate structured responses to architectural insights. These actions typically include creating demands for remediation, initiating lifecycle changes, or launching application rationalization efforts.

Configuring demand actions is essential to transform architectural insights into operational outcomes. You can add a new demand action or edit an existing one.

Related topics

Manage demand actions

View all demand-actions

Add or edit a demand action

Add or edit a demand action that help you enhance the capability of the applications in the Enterprise Architecture Workspace.

Before you begin

Role required: admin

Procedure

1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Setup page by selecting the Setup icon ( ).
3. Select the expand row icon ( ) next to **Demand Actions**.
4. Select **All**.

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5. Add or edit a demand action.
   - To add a demand action, select **New**.
   - To update details of an existing demand action, select an action, then select **Edit**.
6. On the form, fill in the fields.
   For field information, see Demand Actions Form.
7. Select **Save**.

Related topics

View all demand-actions

Configure Enterprise Modeling and Visualization

You can configure the shape libraries, modeling options, entities, and relationships used in the Enterprise Modeling and Visualization.

Related topics

Exploring Enterprise Modeling and Visualization in the EA Workspace

Working with Enterprise Modeling and Visualization

Show or hide shapes in diagrams

Configure a custom shape library element to show or hide it in different diagram types.

Before you begin

Role required: sn_apm.apm_admin

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Setup page by selecting the Setup icon ().
3. Select the Expand row icon ( ) next to *Enterprise Modeling and Visualization*.
4. Select **Shape Libraries**.
5. Open a custom shape library that you created.
6. Select the **Shape Library Elements** tab.
7. Select a shape library element.
8. In the Details tab, select the **Hide in diagram types** field.
9. Select the diagram types in which you want to hide the shape.
   You can remove the diagram type from the list to show the shapes in that diagram.
10. Select **Save**.

Related topics

Add or edit a shape library

Add a shape library element

Create diagram action

Edit a modeling configuration

Add or edit an entity

Add or update shape icon for an entity

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- Add or edit a relationship
- View relationships configurations
- View all entities
- View configuration for Enterprise Architecture Workspace
- View all shape libraries

Add or edit a shape library

Create a shape library or edit an existing library to add new shapes and create diagrams using the shapes.

Before you begin

Role required: sn_apm.apm_admin

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Setup page by selecting the Setup icon ( ).
3. Select the expand row icon ( ) next to *Enterprise Modeling and Visualization*.
4. Select **Shape Libraries**.
5. Create or update a shape library.
   - To create a shape library, select **New**.
   - To update an existing shape library, select a library, then select **Edit**.
6. On the Shape Library form, fill in the fields.

   For field information, see Shape library form.
7. Select **Save**.

Related topics

- Add a shape library element
- Show or hide shapes in diagrams
- Create diagram action
- Edit a modeling configuration
- Add or edit an entity
- Add or update shape icon for an entity
- Add or edit a relationship
- View configuration for Enterprise Architecture Workspace
- View all entities
- View all shape libraries
- View relationships configurations

Add a shape library element

Create a shape library element to associate a shape and its diagram action to the shape library.

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Before you begin
Role required: sn_apm.apm_admin

Procedure
1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Setup page by selecting the Setup icon ().
3. Select the expand row icon ( ) next to *Enterprise Modeling and Visualization*.
4. Select **Shape Libraries**.
5. Open the shape library for which you want to associate a shape element and its diagram action.
6. Select the Shape Library Elements tab.
7. Select **New**
8. On the Shape Library Element form, fill in the fields.

   For field information, see Shape library element form.
9. Select **Save**.

Related topics
- Add or edit a relationship
- Add or edit an entity
- Show or hide shapes in diagrams
- Create diagram action
- Add or update shape icon for an entity
- Edit a modeling configuration
- Add or edit a shape library
- View relationships configurations
- View all entities
- View configuration for Enterprise Architecture Workspace
- View all shape libraries

Create diagram action

Create diagram actions for newly added custom shapes that can be used in Enterprise Modeling and Visualization to create diagrams.

Before you begin
Role required: sn_apm.apm_admin

About this task
After creating custom shapes and adding them to the shape library, you can define actions to associate with each shape. Diagram actions can enhance the user experience by making diagrams more interactive and functional.

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Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Setup page by selecting the Setup icon ( ).
3. Select the expand row icon ( ) next to *Enterprise Modeling and Visualization*.
4. Select **Diagram Actions**.
5. Select **New**.
6. On the Diagram Action form, fill in the fields.

   For field information, see Create diagram action form.
7. Select **Save**.

Related topics

- Add or edit a relationship
- Add or edit an entity
- Show or hide shapes in diagrams
- Add or update shape icon for an entity
- Edit a modeling configuration
- Add a shape library element
- Add or edit a shape library
- View relationships configurations
- View all entities
- View configuration for Enterprise Architecture Workspace
- View all shape libraries

Edit a modeling configuration

As an administrator, you can edit an existing configuration details for modeling. You can also make the configuration active or inactive.

Before you begin

Role required: sn_apm_mdtl_com.mdtl_com_admin

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Setup page by selecting the Setup icon ( ).
3. Select the expand row icon ( ) next to *Enterprise Modeling and Visualization*.
4. Select **Modeling Configurations**.
5. Select a configuration, then select **Edit**.
6. On the Shape Library form, fill in the fields.

   For field information, see Modeling configuration form.
7. Select **Save**.

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Related topics

- Add or edit a relationship
- Add or edit an entity
- Show or hide shapes in diagrams
- Create diagram action
- Add or update shape icon for an entity
- Add a shape library element
- Add or edit a shape library
- View relationships configurations
- View all entities
- View configuration for Enterprise Architecture Workspace
- View all shape libraries

Add or edit an entity

Add an entity or edit an existing entity details that are included in the Enterprise Modeling and Visualization diagram.

Before you begin

Role required: sn_apm.apm_admin

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Setup page by selecting the Setup icon ().
3. Select the expand row icon ( ) next to *`Enterprise Modeling and Visualization`*.
4. Select **Entity Configurations**.
5. Create or update an entity.
   - To create an entity, select **New**.
   - To update an existing entity, select an entity, then select **Edit**.
6. On the Shape Library form, fill in the fields.

   For field information, see Entity configuration form.
7. Select **Save**.

Related topics

- Add or edit a relationship
- Show or hide shapes in diagrams
- Create diagram action
- Add or update shape icon for an entity
- Edit a modeling configuration
- Add a shape library element
- Add or edit a shape library
- View relationships configurations

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View all entities

View configuration for Enterprise Architecture Workspace

View all shape libraries

Add or update shape icon for an entity

Add a shape icon to an entity or edit an existing one to use them in creating Enterprise Modeling and Visualization diagram.

Before you begin

Role required: sn_apm_mdtl_com.mdtl_com_admin

Ensure the shape icon is added or uploaded to the 'db_image.list'.

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Setup page by selecting the Setup icon ( ).
3. Select the expand row icon ( ) next to *`Enterprise Modeling and Visualization`*.
4. Select **Entity Configurations**.
5. Open an existing entity.
   The Entity Configuration page opens for the selected entity.
6. Select the info icon against the **Diagram Action** field.
7. Select **Switch scope**.
   The record opens in edit mode.
8. Enter name of the icon in the **Icon** field.
   The icon is fetched from the db_image.list and updated in the Enterprise Architecture Workspace.
9. Select **Save**.

Related topics

Show or hide shapes in diagrams

Add or edit a shape library

Add a shape library element

Create diagram action

Edit a modeling configuration

Add or edit an entity

Add or update shape icon for an entity

Add or edit a relationship

View relationships configurations

View all entities

View configuration for Enterprise Architecture Workspace

View all shape libraries

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Add or edit a relationship

Add or edit a relationship configuration details available for the Enterprise Modeling and Visualization in the Enterprise Architecture Workspace.

Before you begin

Role required: sn_apm_mdtl_com.mdtl_com_admin

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Setup page by selecting the Setup icon ( ).
3. Select the expand row icon ( ) next to *Enterprise Modeling and Visualization*.
4. Select **Relationships**.
5. Create or update a relationship.
   - To create a relationship, select **New**.
   - To update an existing relationship, select an relationship, then select **Edit**.
6. On the Relationship form, fill in the fields.

   For field information, see Relationship configuration form.

Related topics

Show or hide shapes in diagrams

Add or edit a shape library

Add a shape library element

Create diagram action

Edit a modeling configuration

Add or edit an entity

Add or update shape icon for an entity

View relationships configurations

View all entities

View configuration for Enterprise Architecture Workspace

View all shape libraries

Configure application total cost of ownership (TCO) in Enterprise Architecture Workspace

Configure the application TCO source, cost type, and determine the duration of a fiscal property, in the Enterprise Architecture Workspace.

Related topics

Exploring total cost of ownership (TCO) in Enterprise Architecture Workspace

Working with application Total Cost of Ownership (TCO)

Install the Application Total Cost of Ownership (TCO) plugin

Install the Application TCO store application that you purchased from the ServiceNow Store to make it available on your instance.

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Before you begin

Note: The Application TCO plugin automatically gets installed when you install the Enterprise Architecture Workspace plugin.

Role required: admin

Procedure

1. Navigate to **All** > **System Applications** > **All**.
2. Find the application using the filter criteria and search bar.

   You can search for the application by its name or ID. If you can't find an application, you may have to request it from the ServiceNow Store.

   Visit the ServiceNow Store website to view all the available apps and for information about submitting requests to the store.
3. Select a version from the list and select **Install**.
4. Select the **Load demo data** check box to install the demo data.
   Demo data comprises the sample records that describe application features for the common use cases. Load the demo data when you first install the application on a development or test instance.
5. Select **Install**.

Create a source for an Application TCO

Create a source for an Application Total Cost of Ownership (TCO). Specify the source of cost being ingested in Enterprise Architecture Workspace.

Before you begin

Role required: admin

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace** > **Setup**.
2. Select **TCO**.
3. Select **Sources**.
4. Select **New**.
5. Enter a name for the source.
6. Select **Save**.

Related topics

- Create a TCO source cost type
- Create a cost type for Application TCO in Enterprise Architecture Workspace
- Set the fiscal period property for TCO dashboards

Create a TCO source cost type

Create a source cost type for the TCO source. Specify the type of cost being ingested in Enterprise Architecture Workspace.

Before you begin

Role required: sn_apm.apm_analyst

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About this task
After a source is created for the TCO, you can create a source cost type from the related list.

Procedure
1. Navigate to **Workspaces** > **Enterprise Architecture Workspace** > **Setup**.
2. Select **TCO**.
3. Select **Sources**.
4. Select a source to open it.
5. Select the **TCO Source Cost Types** tab.
6. Select **New**.
7. Enter a name and domain for the source cost type.
   The **Source** is field is auto populated with a source name.
8. Select **Save**.

Related topics
- Create a source for an Application TCO
- Set the fiscal period property for TCO dashboards
- Create a cost type for Application TCO in Enterprise Architecture Workspace

Create a cost type for Application TCO in Enterprise Architecture Workspace

Create a cost type as capital expense (Capex) or operating expense (Opex) for Application TCO. Specify the type of cost being ingested in Enterprise Architecture Workspace.

Before you begin
Role required: admin

Procedure
1. Navigate to **Workspaces** > **Enterprise Architecture Workspace** > **Setup**.
2. Select **TCO**.
3. Select **Cost types**.
4. Select **New**.
5. Enter a name and select the expense type (Capex or Opex).
6. Select **Save**.

Related topics
- Create a TCO source cost type
- Create a source for an Application TCO
- Set the fiscal period property for TCO dashboards

Set the fiscal period property for TCO dashboards

Set the system property (*com.glide.fiscal_calendar.fiscal_unit*) to view TCO dashboards for a specific duration of the fiscal period in the Dashboard page of the Enterprise Architecture Workspace.

Before you begin
Role required: admin

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Procedure

1. Navigate to **All** > **System Properties** > **All Properties**.
2. Search and open the *com.glide.fiscal_calendar.fiscal_unit* property.
3. Update the **Value** field according to your requirement.
   You can update the value to Quarter or Month or Week.
4. Select#**Update**.

   The Portfolio TCO dashboard page shows the data according to the specified duration of the fiscal period. For more details, see Explore the Enterprise Architecture Workspace dashboard.

Related topics

Create a source for an Application TCO

Create a TCO source cost type

Create a cost type for Application TCO in Enterprise Architecture Workspace

Run a scheduled job to update the TCO score range

Run the *Update Score Range in Indicator Score Table* scheduled job to populate the Total Cost of Ownership (TCO) score range on existing **Indicator Score** (apm_app_indicator_score) records when the **Score range** field is not populated.

Before you begin
Role required: admin

About this task
The **Business applications by TCO score** widget on the **Portfolio TCO** tab of the Dashboard page reads the TCO score band directly from a **Score range** field on the **Indicator Score** (apm_app_indicator_score) table.

If you're upgrading from a previous release, your existing **Indicator Score** records don't have this field populated. The widget shows empty state as the X-axis label instead of the TCO score bands. New installations aren't affected because the field is populated automatically as indicator scores are generated.

To populate the **Score range** field on existing records, run the *Update Score Range in Indicator Score Table* scheduled job. This is a one-time, on-demand job that is inactive by default.

Note: The time the job takes to run depends on the number of records in the **Indicator Score** (apm_app_indicator_score) table.

Procedure

1. Navigate to **All** > **System Definition** > **Scheduled Jobs**.
2. In the Name field, enter `Update Score Range in Indicator Score Table` and press Enter to filter the list.
3. Open the *Update Score Range in Indicator Score Table* scheduled job.
4. Verify that your application scope is set to Enterprise Architecture Workspace.
   For information on changing the application scope, see Application picker.
5. Select the **Active** check box to activate the job.
6. Select **Execute Now**.

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Result
The **Score range** field is populated on your existing **Indicator Score** records, and the **Business applications by TCO score** widget displays the TCO score bands.

Related topics
- Exploring total cost of ownership (TCO) in Enterprise Architecture Workspace
- Manage application total cost of ownership (TCO) in Enterprise Architecture Workspace
- Set the fiscal period property for TCO dashboards
- Application indicator score calculation in Enterprise Architecture Workspace

Configure certification policies

Configure certification policies to keep your business applications inventory up to date. Keeping your business application data current helps you to assess your business applications precisely as there are indicators that are dependent on these business applications.

Import certification schedules in to Data Manager

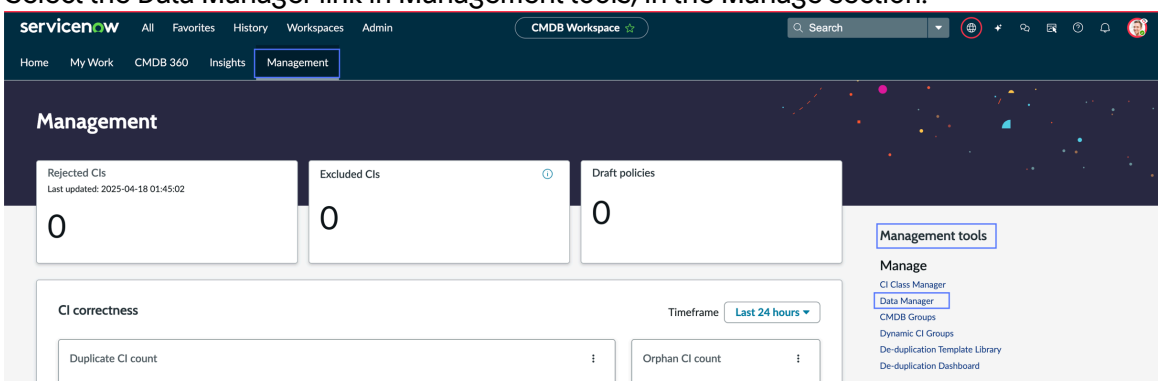
Import the certification schedules into Data Manager to convert the existing certification schedules to certification policies.

Before you begin
Role required: system admin

About this task
This process converts the certification schedules into draft certification policies and you can then publish these policies to activate them.

Note: If you upgraded your EA Workspace from a previous version to the 4.0.0 version, you might see that your certification data is still fetched from the Certification Schedules (cert_schedule) table. Follow these instructions to import your data certification schedules to certification policies.

Procedure
1. Navigate to **All** > **Workspaces** > **CMDB Workspace**.
2. Select **Management** in the CMDB Workspace menu bar.
3. Select the Data Manager link in Management tools, in the Manage section.

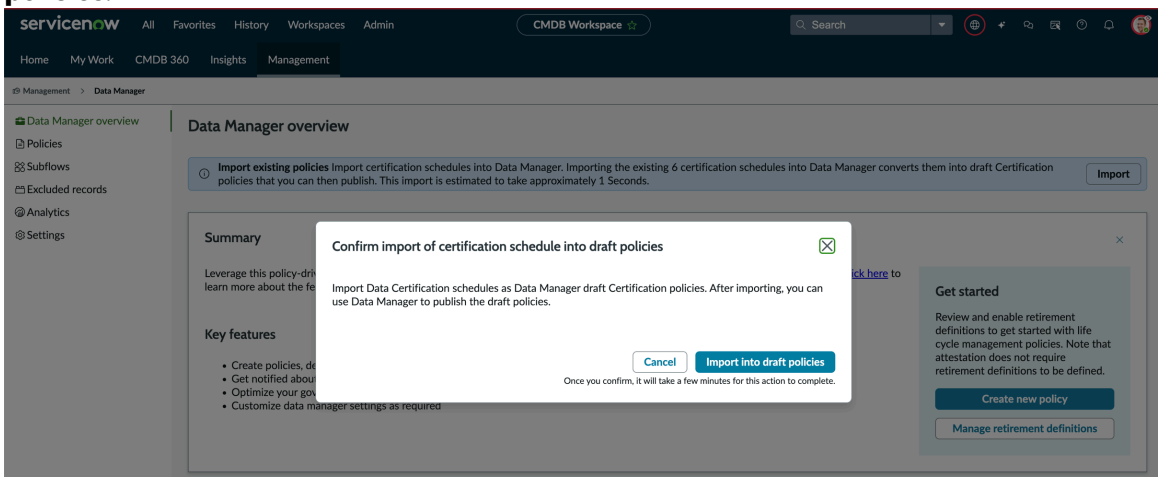


4. On the Data Manager overview page, select **Import** on the banner at the top of the page.

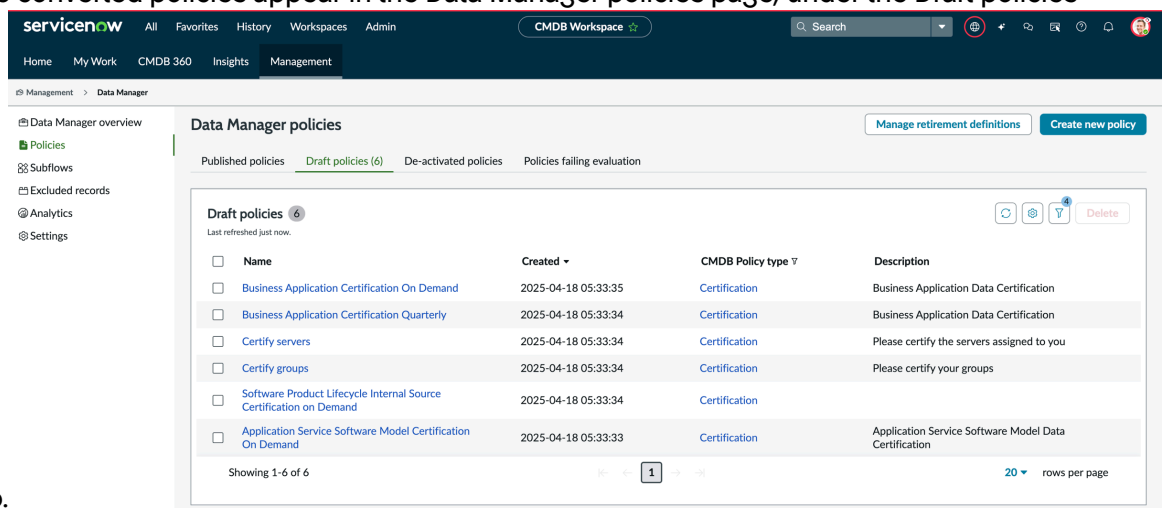
Note: If all the certification schedules are already imported, the Import banner doesn't appear. You can see the imported policies in the Draft policies tab (refer to step 6).

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5. In the Confirm import of certification schedule into draft policies, select **Import into draft policies**.



6. In the Import summary modal, select **View draft policies**.
   The converted policies appear in the Data Manager policies page, under the Draft policies tab.



7. Publish the draft policies to activate them.
   For more information, see Publish a draft Data Manager policy.

Related topics

- Publish a draft Data Manager policy
- Add or edit a certification policy
- View all certification policies

Publish a draft Data Manager policy

Publish the draft policies to activate them.

Before you begin

Role required: system admin

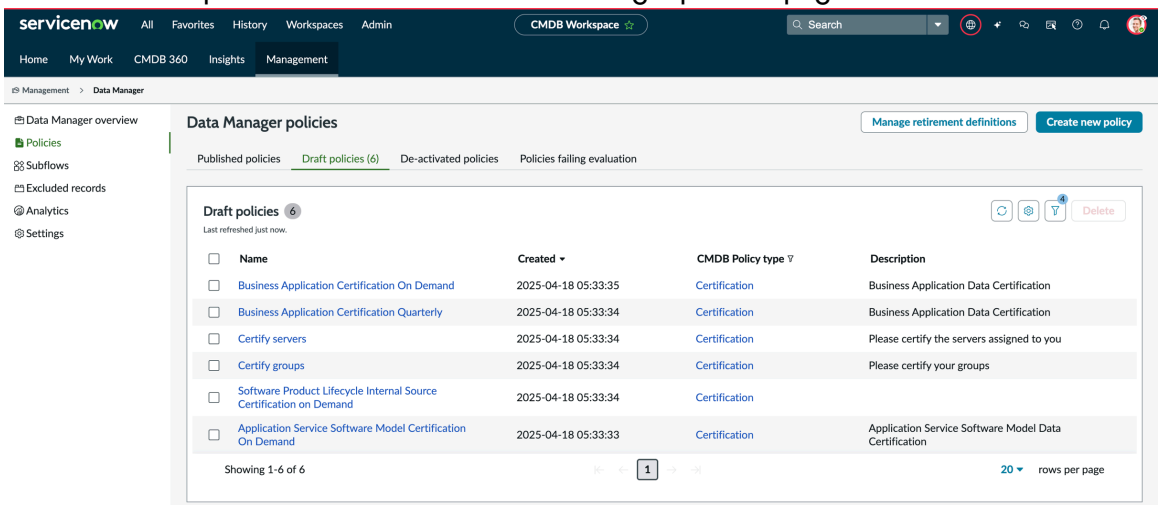
About this task

After importing the legacy certification schedules, you can activate the draft policies by publishing them.

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Procedure

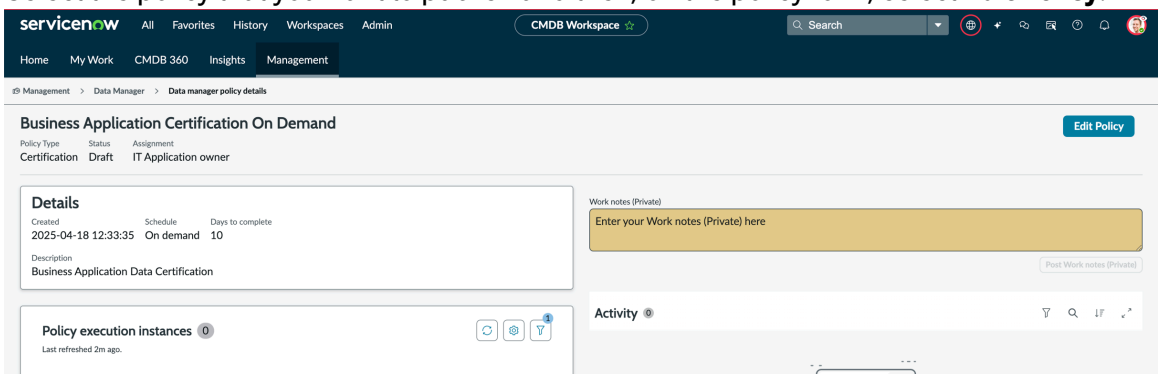
1. Navigate to **All** > **Workspaces** > **CMDB Workspace**.
2. Select **Management** in the CMDB Workspace menu bar.
3. Select the Data Manager link in Management tools, in the Manage section.
4. Select Policies in the left-side bar in the Data Manager overview page.
5. Select the Draft policies list view on the Data Manager policies page.



The following is the list of Enterprise Architecture Workspace certification policies:

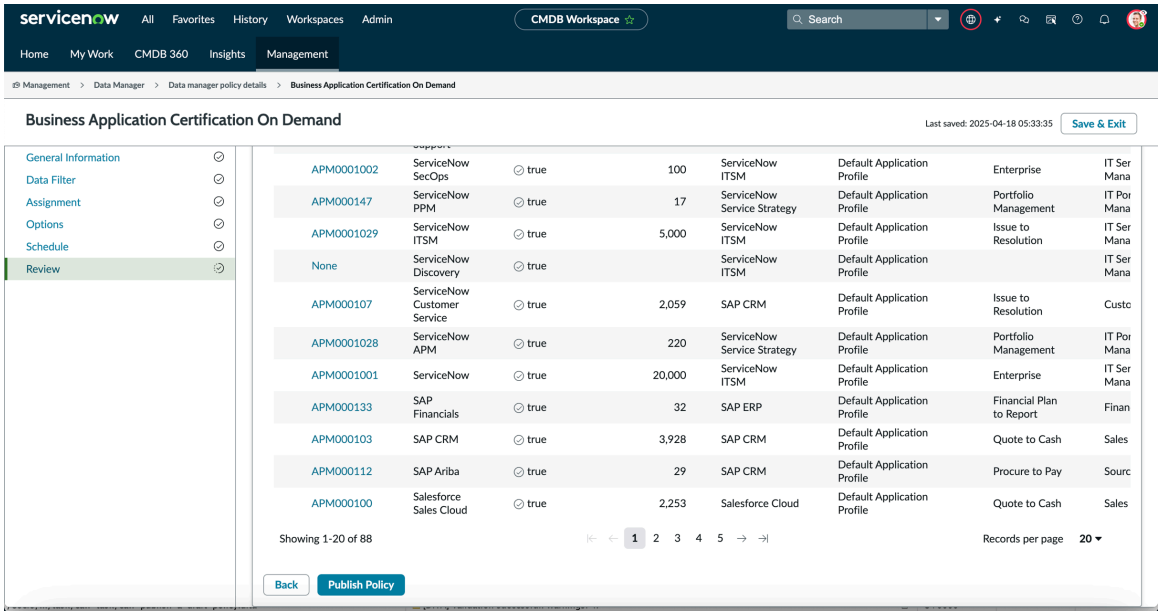
- Application Service Software Model Certification On Demand
- Business Application Certification On Demand
- Business Application Certification Quarterly
- Software Product Lifecycle Internal Source Certification on Demand

6. Select the policy that you want to publish and then, on the policy form, select **Edit Policy**.



7. Review any policy settings by selecting the pages to review in the left-side bar.
8. Select Review in the left-side bar and then select **Publish Policy** to activate the policy.

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The CMDB Data Management Certification Policies (sn_cmdb_ws_dm_certification_policy) table gets populated with the list of published certification policies.

9. Run the following scheduled jobs to populate the The CMDB Data Management Task (cmdb_data_management_task) table:
   - Business Application Certification Quarterly Policy Processor
   - Business Application Certification On Demand Policy Processor
   - Software Product Lifecycle Internal Source Certification on Demand Policy Processor
   - Application Service Software Model Certification On Demand Policy Processor

Result

The Certifications tab in the Needs Attention section fetches and displays the data from the CMDB Data Management Policy (cmdb_data_management_policy) table.

Related topics

Import certification schedules in to Data Manager

Add or edit a certification policy

View all certification policies

Add or edit a certification policy

Add or edit a certification policy in the Enterprise Architecture Workspace.

Before you begin

Role required: certification_admin

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Setup page by selecting the Setup icon ( ).
3. Select the expand row icon ( ) next to **Certification Policies**.
4. Select **All**.
5. Create or update a CMDB Data Management Certification Policy.

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- To create a certification policy, select **New**.
- To update an existing certification policy, select a certification policy, then select **Edit**.

6. On the CMDB Data Management Certification Policy form, fill in the fields.

   For field information, see Certification policy form in Enterprise Architecture Workspace.

7. Select **Save**.

Related topics

Import certification schedules in to Data Manager

Publish a draft Data Manager policy

View all certification policies

Configure Technology Portfolio Management

Configure Technology Lifecycle Management in Enterprise Architecture Workspace. By configuring TLM, you can get application lifecycle risk insights and rationalize applications.

Related topics

Exploring Technology Lifecycle Management (TLM) in Enterprise Architecture Workspace

Working with Technology Lifecycle Management (TLM) in EA Workspace

Activate the Technology Lifecycle Management (TLM) plugin

Activate the Technology Lifecycle Management (TLM) store application that you purchased from the ServiceNow Store to make it available on your instance.

Before you begin

Important:

Technology Lifecycle Management (TLM) was previously known as Technology Portfolio Management (TPM). TPM and TLM refer to the same feature. Table names and scheduled job names continue to use TPM and haven't been renamed.

Whether your instance displays TPM or TLM also depends on your application versions. TLM labels appear only when both the Enterprise Architecture Workspace application (version 9.2.1 or later) and the Technology Lifecycle Management plugin, sn_apm_tpm (version 1.11.0 or later), are installed. If either application is on an earlier version, the interface continues to show TPM.

Role required: admin

Procedure

1. Navigate to **All** > **System Applications** > **All**.
2. Find the application using the filter criteria and search bar.

   You can search for the application by its name or ID. If you can't find an application, you may have to request it from the ServiceNow Store.

   Visit the ServiceNow Store website to view all the available apps and for information about submitting requests to the store.

3. Select a version from the list and select **Install**.
4. Select the **Load demo data** check box to install the demo data.

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Demo data comprises the sample records that describe application features for the common use cases. Load the demo data when you first activate the application on a development or test instance.

5. Select **Install**.

Related topics

Tables installed with TLM in the EA Workspace

Business rules for TLM in EA Workspace

Scheduled jobs for TLM in the EA Workspace

Configure Technology Reference Model

Configure Technology Reference Model Enterprise Architecture Workspace. Configuring the Technology Reference Model offers a structured approach to managing technology standards across your organization.

Install the Technology Reference Model (TRM) Model plugin

Install the Technology Reference Model (TRM) store application that you purchased from the ServiceNow Store to make it available on your instance.

Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **System Applications** > **All**.
2. Find the application using the filter criteria and search bar.

   You can search for the application by its name or ID. If you can't find an application, you may have to request it from the ServiceNow Store.

   Visit the ServiceNow Store website to view all the available apps and for information about submitting requests to the store.

3. Select a version from the list and select **Install**.
4. Select the **Load demo data** check box to install the demo data.
   Demo data comprises the sample records that describe application features for the common use cases. Load the demo data when you first install the application on a development or test instance.
5. Select **Install**.

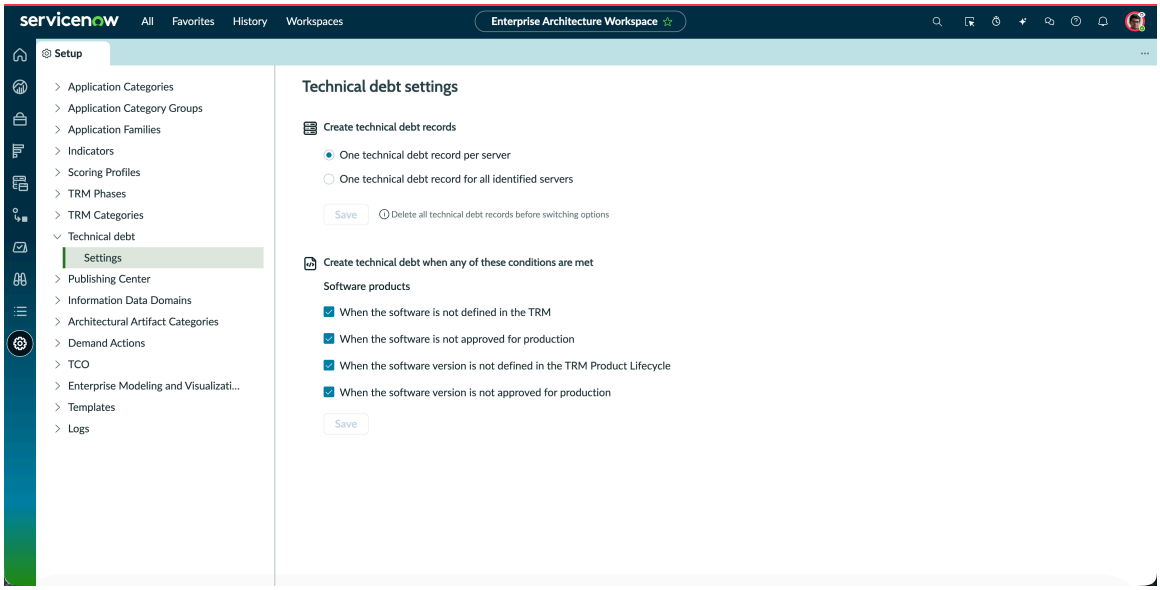
Technical debt settings

Control which server and reason criteria the scheduled job uses to create TRM technical debt records.

Note:

The Technical debt settings page requires Technology Portfolio Management plugin (sn_apm_tpm) version 1.11.1 or later. If this version isn't installed, contact your system administrator to update the plugin.

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By default, the scheduled job *`Populate TRM technical debts in the EA Workspace`* creates a separate technical debt record for each server on which unapproved software runs. You can change this so that the job creates one technical debt record for a software product regardless of how many servers it runs on.

You can also choose which reasons the job uses to create technical debt. If you clear a reason, the job stops creating new technical debt records for that reason, and any existing active records for that reason move to the **Archived** state.

Note:

Changing the server configuration requires you to delete all existing technical debt records first. The system blocks the change until you do.

An organization early in its technology governance practice might not be concerned yet with whether a software product is cataloged in the TRM at all. However, it does want to enforce version compliance for products that are cataloged. That organization can clear the reasons related to whether the product is defined or approved, and keep only the version- and edition-related reasons selected. As the organization's practice matures, it can select additional reasons to build a stricter definition of technical debt.

Related topics

Configure technical debt settings

TRM technical debt

TRM technical debt states and transitions

Configure technical debt settings

Configure whether the server is part of a technical debt record's identity and select which reasons the scheduled job uses to create technical debt.

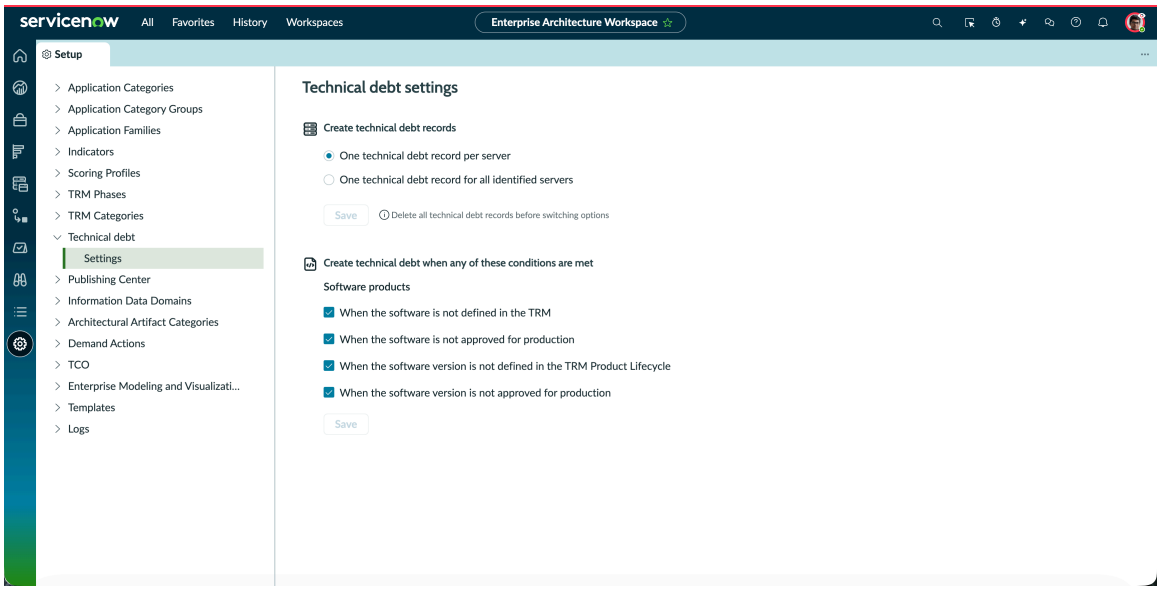
Before you begin

The Technical debt settings page requires Technology Portfolio Management plugin (sn_apm_tpm) version 1.12.1 or later. If this version isn't installed, contact your system administrator to update the plugin.

Role required: sn_apm.apm_admin

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About this task



Use the technical debt settings to control how the scheduled job *`Populate TRM technical debts in the EA Workspace`* identifies and creates technical debt records.

Procedure

1. Navigate to **Workspace** > *`Enterprise Architecture Workspace`*.
2. Open the Setup page by selecting the Setup icon .
3. Select **Technical debt**, and then select **Settings**.
4. Under **Create technical debt records**, select an option.
   - **One technical debt record per server**: Creates a separate technical debt record for each server on which the software runs. This is the default option.
   - **One technical debt record for all identified servers**: Creates a single technical debt record for the software, regardless of how many servers it runs on. The record doesn't show an installed-on server value.

   Note:

   Regardless of which option you select, you can view all the servers a software product is installed on from the **Discovered Technology** related list on the technical debt record.

5. Select **Save**.

   Note:

   If technical debt records already exist, you must delete all of them before you can change this option. Contact your system administrator to run a background script that deletes the existing records.

6. Under **Create technical debt when any of these conditions are met**, select or clear the check boxes for the reasons you want the job to use.
   - When the software is not defined in the TRM
   - When the software is not approved for production

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- When the software version is not defined in the TRM Product Lifecycle
- When the software version is not approved for production

Note:

At least one reason must be selected. If you clear all the check boxes, an error message appears and the setting isn't saved.

7. Select **Save**.
   A confirmation message appears. Any active technical debt records whose reason you cleared move to the **Archived** state on the next run of the scheduled job.

Result

The scheduled job *Populate TRM technical debts in the EA Workspace* uses the updated server and reason configuration starting with its next run. You don't need to restart the instance or re-register the job.

Related topics

Technical debt settings

TRM technical debt states and transitions

Update TRM technical debt data using scheduled job

Technical debt calculation

Configure ServiceNow Otto for Enterprise Architecture (EA)

If you have the admin role, you can configure the ServiceNow Otto for Enterprise Architecture (EA) to enable generative AI skills in Enterprise Architecture Workspace (EA).

Before you begin

Note: Depending on your license, you will have access to certain application features, generative AI skills, agentic workflows, and AI agents. For more information, see ServiceNow product tiers.

Role required: admin

About this task

Use the AI Admin Hub to configure ServiceNow Otto for EA. While all ServiceNow Otto for EA skills are activated by default, you can use this console to activate the plugins in case it's turned off or configure the generative AI skills. For additional information, see Overview tab in AI Admin Hub.

You can use Now LLM Service, Azure OpenAI, Google Gemini or Anthropic Claude on AWS as the AI model provider for all generative AI skills and AI agents. Use the Configuration Controls in AI Control Tower to define which options are available, then set the skill-level preferences in the AI Admin Hub console. For more information, see Large language models on the ServiceNow AI Platform.

The following table lists the features and skills that you can access from the AI Admin Hub.

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Enterprise Architecture features and skills in the AI Admin Hub

EA feature	Skill
Architectural decision record (ADR)	Architectural decision record doc summarization and actions (Enterprise Architecture Workspace)
Business application	Business application insights (Enterprise Architecture Workspace)
Enterprise architecture diagrams	Diagram change analysis (Enterprise Architecture Workspace)
Form fields associated with business applications, business capabilities, business processes, value stream stages, and information objects	Refine text (Enterprise Architecture Workspace)
Business process map diagrams	Create diagram from image (Enterprise Architecture Workspace)

- **Note:** The Now LLM Service is no longer the default model provider for new or inactive AI assets. A third-party LLM is now selected by default, while existing configurations using the Now LLM Service continue unchanged. The Now LLM Service is still available for manual selection.

- **Note:** Starting with the September 2026 release, Gemma 4 joins our growing portfolio of open-weight models available through Now LLM Service. The latest industry advancements are available alongside sovereignty-focused options. All models are hosted and governed by ServiceNow with the same infrastructure and data protections. Older models will remain available for existing published AI skills, agents, and agentic workflows, but will no longer be available for new development or configuration. For details, see the KB3066214: ServiceNow Otto Model Upgrades article in the Now Support Knowledge Base.

The ServiceNow Otto for Enterprise Architecture (EA) system requirements are as follows:

- ServiceNow Otto® for Platform (v7.0.1)
- Enterprise Architecture Workspace (v3.4.0)

Procedure

1. Install the ServiceNow Otto for Enterprise Architecture (EA) plugin (sn_ea_gen_ai).
   - For information about the application dependencies, see Supporting information for ServiceNow Otto for Enterprise Architecture (EA).
   - For information about the installation process, see Install plugins for ServiceNow Otto.
2. Navigate to **All** > *AI Admin Hub* > **AI Skills** to access the skills tab of the AI Admin Hub. If you're already in the AI Admin Hub, you can select the **AI Skills** tab on the screen.
3. Select the expand row icon next to **Technology**.
4. Select **EA**.
5. Activate and configure the skill for ServiceNow Otto for Enterprise Architecture (EA).

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Skill	Action
ADR Doc Summarization and Actions	**a.** On the *Enterprise Architecture Workspace* skill card, select **View details**. **b.** Select **Activate skill**. **c.** Go to step 6 and review the details.
Business application insights	**a.** Select **Activate Skill**. **b.** On the **Choose input** tab, view the table, fields, and related list details that Service Now Otto® leverages to generate business application insights. **c.** On the **Define availability** tab, configure when and under what conditions the skill will be available and select **Save and con tinue**. The available options are: ▪ **Skill is always available**: Select this op tion if you want the skill to be available at all times. ▪ **Customize skill availability**: Select this option if you want to define specific condi tions for the availability of the skill. For ex ample, you can define whether you want this skill to be available for active busi ness applications. **d.** On the **Define trigger** tab, select how the skill is triggered and select **Save and contin ue**. The available options are: ▪ **User trigger**: Select this option if you want users to generate business appli cation insights on demand by selecting **Generate insights**. Insights are generat ed only when users request them, which helps avoid generating insights when users only want to view business applica tion details. For example, in the applica tion rationalization bubble chart, the side panel opens on the **Details** tab. ▪ **Automatic**: Select this option if you want the skill to generate business application insights automatically, without user inter action. For example, when users open a business application record page, the in sights are already generated. For exam ple, in the application rationalization bub ble chart, the side panel opens on the **In sights** tab. Optionally, define conditions for triggering the skill automatically by se lecting a field, an operator, and a value. To add more conditions, select **New con**

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Skill	Action
	dition set. For example, you can set the skill to trigger automatically only for ac tive business applications. By default, the skill trigger is set to **Automat ic**. **e.** On the **Define access** tab, verify the roles that have access to the skill. If you want to provide access to more roles, perform the following: **i.** Select the edit icon . **ii.** Verify that your application scope is set to ServiceNow Otto for Enterprise Archi tecture (EA). For information on how to change the application scope, see Appli **iii.** Select the user access level, according to your requirement. ▪ **Any authenticated user**: Selecting this option enables any logged-in user to use the skill. ▪ **Select Roles**: Selecting this option en ables you to add specific roles in the **Roles** field. **f.** Select **Apply**. The new role is added to the access list. **Note:** The **Role restrictions to skill** section displays the roles that have ac cess to the skill, by default. **g.** Go to step 6 and review the details.

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Skill	Action
	Note: An admin user can also define and configure custom parameters for the prompt. To define and configure cus tom parameters, perform the following: **a.** Select the context menu icon (⋮) next on the **Business applications in sights** card. **b.** Select **Make a copy**. The You are making a copy of a skill di alog box appears. **c.** Select **Make a copy**. **d.** Perform the following: **i.** On the **General details** tab, modify the name or description of the skill and select **Save and continue**. **ii.** On the **Choose input** tab, modify the table, fields, and related list de tails that ServiceNow Otto® lever ages to generate business applica tion insights and select **Save and continue**. **iii.** On the **Define availability** tab, con figure when and under what condi tions the skill will be available and select **Save and continue**. **iv.** On the **Define trigger** tab, select how the skill is triggered and select **Save and continue**. **v.** On the **Define access** tab, modify the roles that have access to the skill and select **Save and continue**. **vi.** On the **Select display** tab, enable the **Display** toggle and then elect **Save and continue**. **vii.** On the **Review and activate** tab, re view the summary of your choices and select **Activate**.
Diagram change analysis	**a.** Select **Turn on**. **b.** On the **Turn on Diagram change analysis** page, verify the roles that have access to the skill. **c.** If you want to provide access to more roles, perform the following:

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Skill	Action
	i. Select the edit icon . ii. Verify that your application scope is set to ServiceNow Otto for Enterprise Archi tecture (EA). For information on how to change the application scope, see Appli iii. Select the user access level, according to your requirement. ▪ **Any authenticated user**: Selecting this option enables any logged-in user to use the skill. ▪ **Select Roles**: Selecting this option en ables you to add specific roles in the **Roles** field. **d.** Select **Apply**. The new role is added to the access list. **Note:** The **Role restrictions to skill** section displays the roles that have ac cess to the skill, by default. **e.** Select **Turn on**. The diagram change analysis skill is activat ed.
Refine text	**a.** Select **Activate Skill**. **b.** Go to step 6 and review the details.
Create diagram from image	If the skill is inactive: **a.** Select **Turn on**. **b.** Go to step 6 and review the details.

6. Review the following parameters for the selected skill.
   a. Review the roles than can access the skill. If necessary, select the edit icon if you want to add access to more roles.

      You must verify that your application scope is set to ServiceNow Otto for Enterprise Architecture (EA). For information on how to change the application scope, see Application picker.

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Note:

- For the ADR doc summarization and actions skill, the sn_apm.apm_user and sn_apm.apm_read roles are selected by default.

  To learn more about security in ServiceNow Otto AI agents with access control lists (ACLs), see Implement access control in AI agents.

- The **Role restrictions to skill** section displays the roles that have access to the skill, by default.

b. Select display: Review where the skill appears.

Note: When the **In-product desktop** option is selected, the skill is displayed in all EA products.

Select **Save and continue**.

c. Review and activate: Review the summary of your choices.

7. Complete the configuration and activate the skill by selecting **Activate**.
   The skill is configured and activated.

Related topics

ServiceNow Otto for Enterprise Architecture (EA) access roles

Configure AI Data Explorer and Query Generation skills

You can configure the AI Data Explorer and Query Generation skills to provide AI-assisted data exploration features and generate insights in Enterprise Architecture Workspace.

Before you begin

Note: Depending on your license, you will have access to certain application features, generative AI skills, agentic workflows, and AI agents. For more information, see ServiceNow product tiers.

Role required:

- now_assist_explorer_admin or higher (to configure AI Data Explorer)
- admin (to configure Query Generation)

About this task

Configuring AI Data Explorer and Query Generation skills enables you to use a conversational interface to query and analyze data from Enterprise Architecture Workspace dashboards instead of manually reviewing dashboard visualizations.

Procedure

1. AI Data Explorer skills.
   For information on how to activate AI Data Explorer skills, see Activate AI Data Explorer skills.

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Note:

Activate the following skills for Enterprise Architecture Workspace dashboard insights:

- **Analytics exploration**
- **Exploration summarization**
- **Refine text in exploration**
- **Data visualization generation**

2. Activate Query Generation skills.

   For information on how to Activate Query Generation skills, see Query Generation skills.

   Note: Activate the following skills for Enterprise Architecture Workspace dashboard insights:

   - **Analytics query generation**
   - **Analytics hidden insights generation**

3. Configure AI Search.

   For information on how to configure AI Search, see Configuring AI Search

Related topics

Generate insights for Enterprise Architecture Workspace dashboard widgets

Explore the Enterprise Architecture Workspace dashboard

Enable Knowledge Graph system properties for the Enterprise Architecture query agent

Enable the Knowledge Graph system properties to allow the Enterprise Architecture query agent to generate accurate answers based on your Configuration Management Database (CMDB) data.

Before you begin

Role required: admin

About this task

The Enterprise Architecture query agent uses the ServiceNow Knowledge Graph to answer questions about CMDB relationships and infrastructure data. To enable this capability, you must set the required Knowledge Graph system properties to `true`. Enable the following system properties:

- *sn_kg.description_generation.enable.cmdb_rel_ci*
- *sn_kg.query.enable_cmdb_rel_ci*
- *sn_kg.description_generation.enable.non_production_envs* — Required only on non-production instances such as development or test environments.

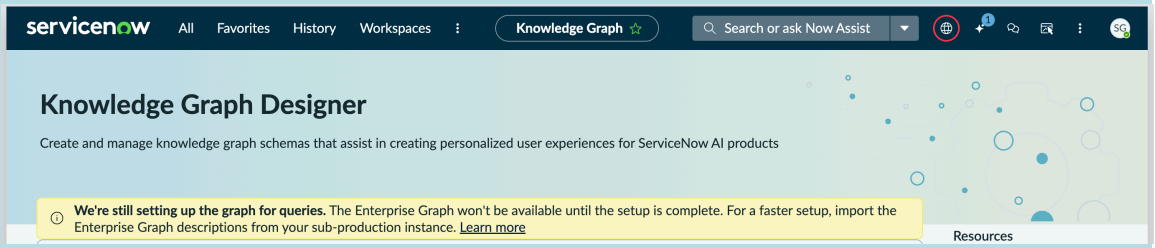
After enabling the properties, the Knowledge Graph runs scheduled jobs that read your CMDB data and generate descriptions and relationships across your instance. Initial data processing time varies based on the volume of data in your instance.

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Important:

Until Knowledge Graph completes its initial data processing, responses from the Enterprise Architecture query agent that rely on CMDB relationship data may be incomplete or limited. Query results improve progressively as processing continues.

If the Knowledge Graph data processing is in progress, the Knowledge Graph Designer displays a notification. This means that the scheduled jobs required to set up the enterprise graph are still running. The Enterprise Architecture query agent is not available until this process is complete and the notification is no longer displayed. To speed up the process, you can import enterprise graph descriptions from a non-production instance where setup has already completed. For more information, see Enterprise Graph initial setup in production instance.



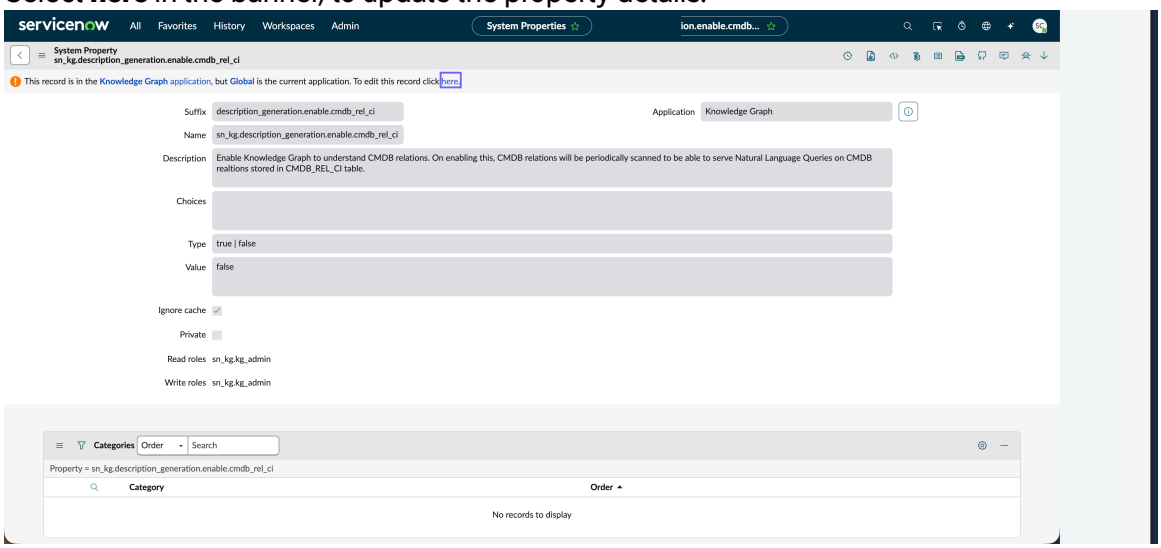
For more information on Knowledge Graph configuration, see Configuration item relationships and Knowledge Graph and Setting up Enterprise graph in sub-production instance.

Procedure

1. Select **All** and in the navigation filter enter *`sys_properties.list`*.
2. Search for and open the *`sn_kg.description_generation.enable.cmdb_rel_ci`* system property.

   Note: You can similarly search and open the *`sn_kg.query.enable_cmdb_rel_ci`* and *`sn_kg.description_generation.enable.non_production_envs`* system properties.

3. Select **here** in the banner, to update the property details.



4. In the **Value** field, set the value to `true`.
5. Select **Update**.

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Result

Knowledge Graph begins processing your CMDB data using scheduled jobs. After initial processing is complete, the Enterprise Architecture query agent uses the relationships and descriptions in your instance to answer questions about your CMDB data.

Related topics

- Exploring ServiceNow Otto for Enterprise Architecture (EA)
- Exploring Enterprise Architecture query agent
- Working with Enterprise Architecture query agent
- Configure ServiceNow Otto for Enterprise Architecture (EA)
- Activate the ServiceNow Otto panel standard chat
- Connect the EA MCP server to an AI assistant

Managing Enterprise Architecture Workspace

Use the Enterprise Architecture Workspace (EAW) for managing portfolios, modeling architecture, and visualizing IT landscapes.

Related topics

- Exploring Enterprise Architecture Workspace
- Configuring Enterprise Architecture Workspace
- Integrating Enterprise Architecture Workspace with other applications

Working with Enterprise Architecture workspace home page

Enterprise Architecture Workspace home page serves as a personalized command center for enterprise architects, offering a unified, role-based view of portfolio insights, tasks, and health indicators. The Home page is designed to give architects immediate visibility into the state of their portfolios.

Apply filters to the Portfolio Overview and Health section

You can apply filters to the Portfolio Overview and Health section in the Enterprise Architecture Workspace. Based on the applied filters, the interactive cards and graphs displayed in this section are updated, and you can view specific business applications and business capability data. Your filter preferences are saved and applied the next time you visit the page.

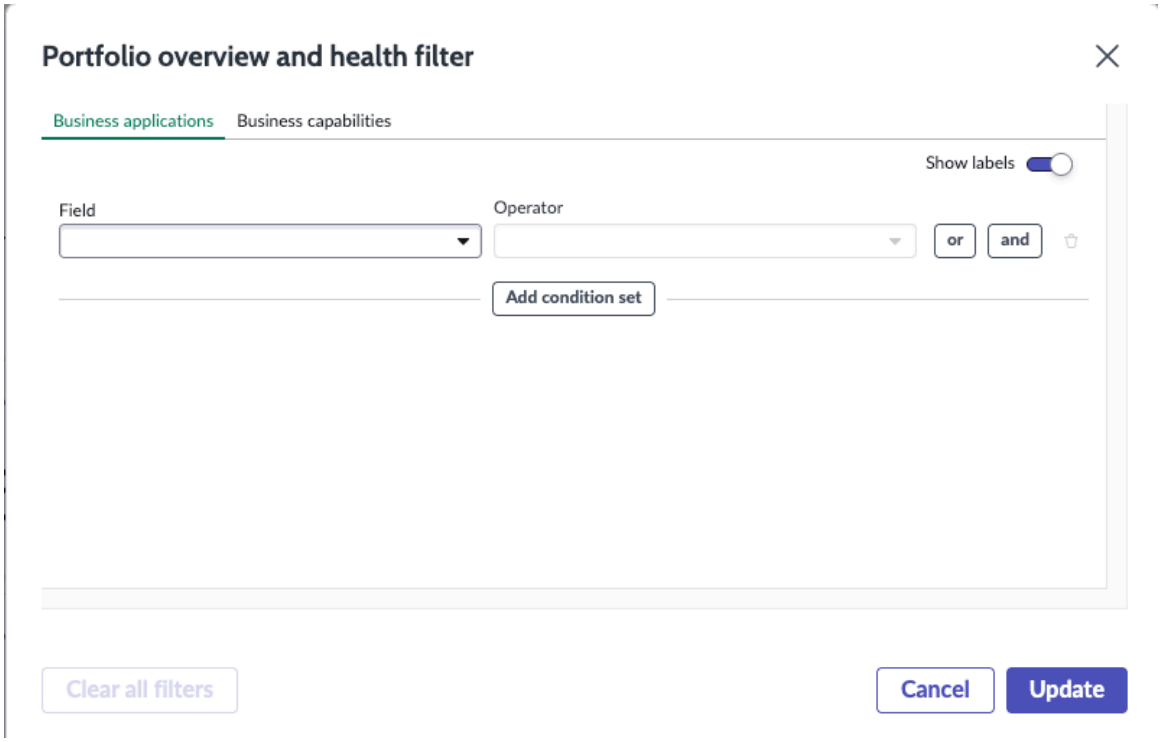
Before you begin

Role required: sn_apm.apm_read

Procedure

1. Navigate to **Workspaces** > *`Enterprise Architecture Workspace`*.
2. In the Portfolio Overview and Health section, select the Portfolio overview and health filters icon ( ).
   The Portfolio overview and health filter pop-up window appears.

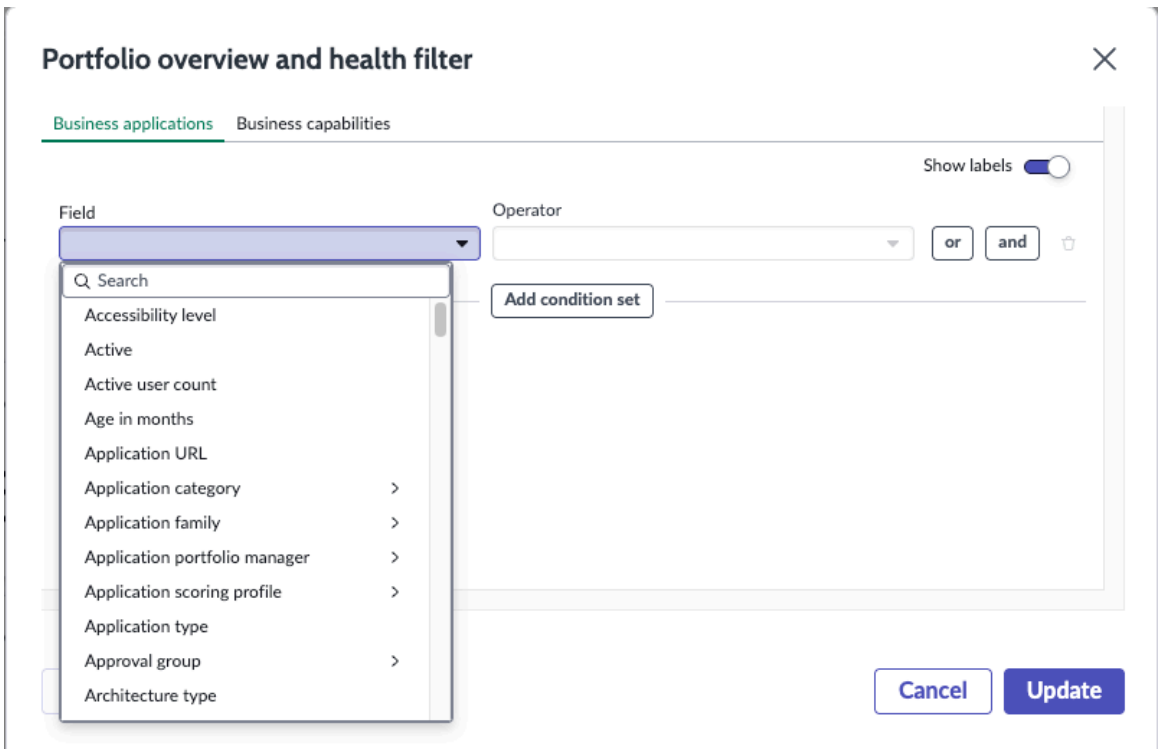
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3. Depending on the data you want to filter for, select the **Business applications** or the **Business capabilities** tab.

   You can apply filters for both business applications and business capabilities simultaneously.

4. Add conditions to filter the business applications or business capabilities.
   You can add multiple conditions.



5. Select **Update**.

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The interactive cards and graphs are updated based on your applied filters. Also, an indicator is displayed on top of the filter icon to show the number of filters applied.

Note: You can also clear all applied filters by selecting the **Clear all filters** button.

Related topics

Enterprise Architecture Workspace user interface

Working with Enterprise Architecture query agent

You can ask the Enterprise Architecture query agent natural language questions about your enterprise architecture portfolio using the ServiceNow Otto® panel in Enterprise Architecture Workspace.

Before you begin

Note: Depending on your license, you will have access to certain application features, generative AI skills, agentic workflows, and AI agents. For more information, see ServiceNow product tiers.

Important: This generative AI skill is turned on by default. The skill will be automatically available to appropriate role users for the application. For more information, see AI agents, skills, and agentic workflows on by default.

Before using the Enterprise Architecture query agent with CMDB relationship data, confirm that an administrator has activated the required Knowledge Graph system properties. For information, see Enable Knowledge Graph system properties for the Enterprise Architecture query agent. Also, check if the ServiceNow Otto® panel is active. For information, see Activate the ServiceNow Otto panel standard chat.

Role required:

- sn_apm.apm_user or sn_apm.apm_read
- now_assist_panel_user

About this task

The Enterprise Architecture query agent returns structured answers based on your enterprise architecture data. Depending on the question, the response may include a list of records, field values, trend comparisons, or an impact summary. The agent retains context within a session, so follow-up questions the agent interprets without requiring you to restate the original question.

Example questions:

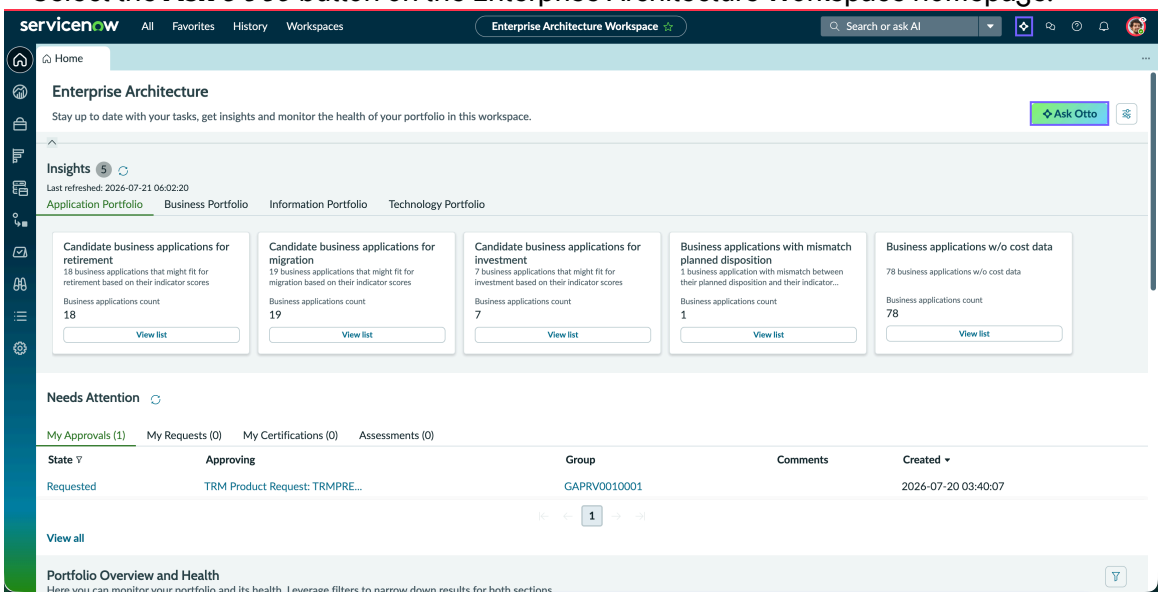
- List business apps with CSAT score greater than 6 and technical risk score greater than 8
- List all capabilities of a business application along with all their scores
- Get the owner of a business application
- List business apps supported by multiple capabilities
- Get business applications without owners
- List top-level capabilities
- List business applications not assigned to capabilities
- List applications that are candidates for retirement
- Which business capabilities are impacted if a specific database fails?

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- Which entities are affected by a failure of a specific server or storage device?
- Which servers and databases support a business application?

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the ServiceNow Otto® panel.
   Use one of the following methods:
   - Select the ServiceNow Otto® icon ( ) in the navigation bar.
   - Select the **Ask *Otto*** button on the Enterprise Architecture Workspace homepage.



3. In the Ask or search for anything field, type your question in natural language.
4. Press Enter or select the send icon.
   The agent searches for relevant data and actions. A **Processing** indicator appears while the agent works.
5. Review the response.

   After returning a response, the agent may display related questions. Select a suggestion or type a follow-up question to continue exploring your enterprise architecture data.

   If the response references a specific record, such as a business application or a capability, the record name appears as linked text. Select the linked text to open that record directly in Enterprise Architecture Workspace.

   If you ask about an infrastructure CI and more than one CI matches the name that you entered, the response lists the matching CIs with their class. Specify the CI that you want in your next message to continue.

Result

The Enterprise Architecture query agent returns a structured answer based on your enterprise architecture data. The agent retains context within a session, so follow-up questions such as Now `show me their owners` the agent interprets without requiring you to restate the original question.

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Related topics

- Exploring Enterprise Architecture query agent
- Working with AI agent agentic workflow in ServiceNow Otto for Enterprise Architecture (EA)
- Enable Knowledge Graph system properties for the Enterprise Architecture query agent
- Exploring ServiceNow Otto for Enterprise Architecture (EA)
- Configure ServiceNow Otto for Enterprise Architecture (EA)
- ServiceNow Otto for Enterprise Architecture (EA) access roles
- Access Enterprise Architecture data using MCP tools

Working with AI agent agentic workflow in ServiceNow Otto for Enterprise Architecture (EA)

Use the AI agents in Enterprise Architecture to help complete tasks autonomously.

Note: Depending on your license, you will have access to certain application features, generative AI skills, agentic workflows, and AI agents. For more information, see ServiceNow product tiers.

Note: Starting with the September 2026 release, Gemma 4 joins our growing portfolio of open-weight models available through Now LLM Service. The latest industry advancements are available alongside sovereignty-focused options. All models are hosted and governed by ServiceNow with the same infrastructure and data protections. Older models will remain available for existing published AI skills, agents, and agentic workflows, but will no longer be available for new development or configuration. For details, see the KB3066214: ServiceNow Otto Model Upgrades article in the Now Support Knowledge Base.

Available agentic workflow for AI agents for Enterprise Architecture

Agentic workflow name	Description	Available AI agents
Generate enterprise architecture diagram	Generates diagrams for business applications hierarchy in Enterprise Modeling and Visualization and summarizes them.	Enterprise architecture diagrams AI agent

Note: Depending on your license, you will have access to certain application features, generative AI skills, agentic workflows, and AI agents. For more information, see ServiceNow product tiers.

Important:

By default, all agentic workflow and AI agent records are read only.

To change any configuration of an AI agent, you must first duplicate the use case. For information, see duplicate the use case. Then proceed with the following steps:

- Activate the use case.
- Activate all agents in a use case. To invoke the Generate enterprise architecture diagram use case, you can ask for a business hierarchy diagram for a specific entity through the ServiceNow Otto panel.

To view more information on AI agents and how to install them, see AI Agent Studio.

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Enterprise Architecture AI agent diagramming agentic workflow

Use the Enterprise architecture diagrams AI agent to generate Enterprise Modeling and Visualization diagrams for business applications hierarchy and summarize them.

Note: Depending on your license, you will have access to certain application features, generative AI skills, agentic workflows, and AI agents. For more information, see ServiceNow product tiers.

Note: Starting with the September 2026 release, Gemma 4 joins our growing portfolio of open-weight models available through Now LLM Service. The latest industry advancements are available alongside sovereignty-focused options. All models are hosted and governed by ServiceNow with the same infrastructure and data protections. Older models will remain available for existing published AI skills, agents, and agentic workflows, but will no longer be available for new development or configuration. For details, see the KB3066214: ServiceNow Otto Model Upgrades article in the Now Support Knowledge Base.

Generate enterprise architecture diagram overview

Use the Generate enterprise architecture diagram agentic workflow to create enterprise architecture diagrams for business applications hierarchy, through a conversation with an AI agent in the ServiceNow Otto panel. This agentic workflow accelerates the time to value for enterprise architects while building business hierarchy diagrams. It also enables non-enterprise architects to understand the context of an architectural diagram.

After generating the diagram, the AI agent suggests summarizing the created business application hierarchy diagram, listing all entities in the diagram and describing the relationship between them.

You can activate the agentic workflow template by setting the display settings to include the ServiceNow Otto panel. To change instructions for this agentic workflow, duplicate it and adjust the settings to suit your specific needs. Then activate the duplicated version instead. For information on how to duplicate a agentic workflow, see duplicate the agentic workflow.

Important:

- The ServiceNow Otto Panel user role (now_assist_panel_user) is required to view the ServiceNow Otto panel on your instance.
- The Enterprise Architecture user role (sn_apm.apm_user) is required to use the Generate enterprise architecture diagram agentic workflow.

Role masking

Required role: sn_apm.apm_user.

Generate enterprise architecture diagram agentic workflow

Generate Enterprise Architecture diagrams for business applications hierarchy and summarize them.

For Admins to access or enable the agentic workflow:

1. Navigate to **All** > **AI Agent Studio** > **Create and manage**.
2. Select **Generate enterprise architecture diagram**.

For users to invoke the agentic workflow:

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1. Select the ServiceNow Otto icon ( ) anywhere in your instance.
2. Enter a prompt to create a diagram for a particular business application.

   It's essential that your prompt contains the word **diagram** in some form. An example prompt is **Create a diagram for XYZ business application**.

AI Agents used in the Generate enterprise architecture diagram agentic workflow

The Enterprise architecture diagrams AI agent is used in the Generate enterprise architecture diagram agentic workflow.

Activate the Generate enterprise architecture diagram agentic workflow

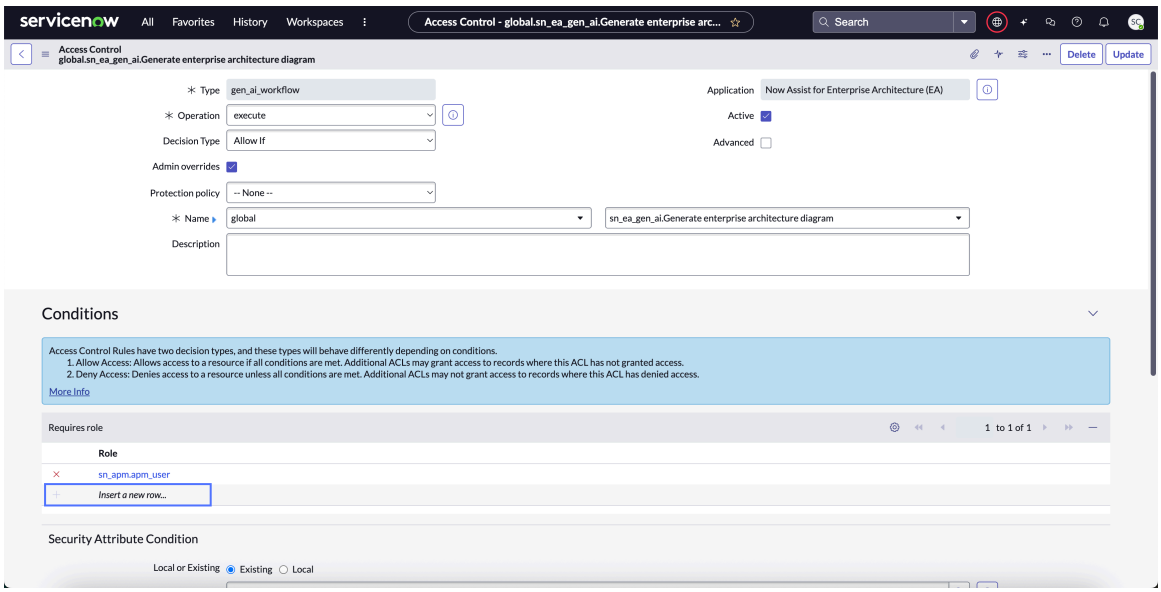
To activate the Generate enterprise architecture diagram agentic workflow, follow the steps mentioned in Activate an agentic workflow template.

Note: No triggers are required for the Generate enterprise architecture diagram agentic workflow.

However, in the Define security controls page, in the **Define user access** section, you can review the roles that can access the agentic workflow. For **Generate enterprise architecture diagram** agentic workflow, sn_apm.apm_user role is applied by default.

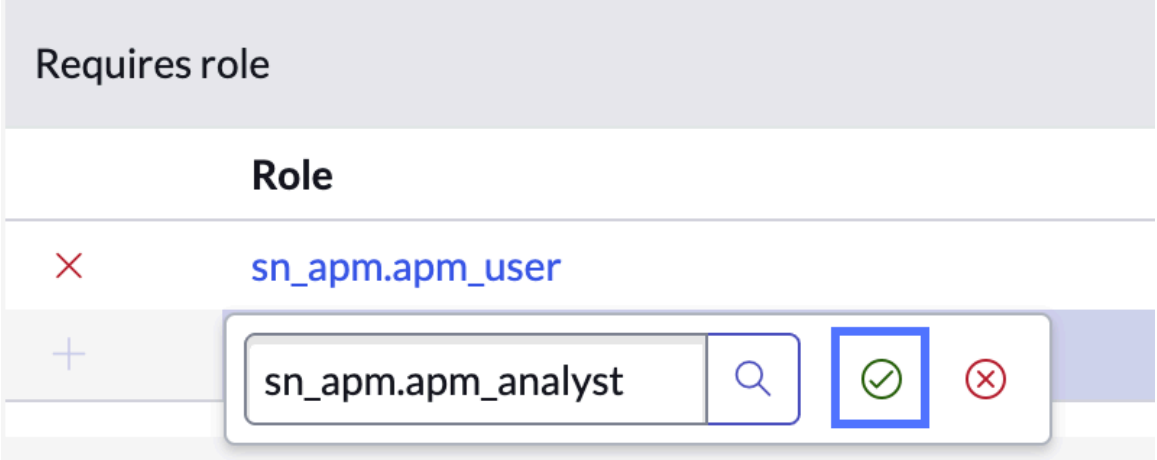
To add access to more roles, perform the following:

1. Set your application scope to ServiceNow Otto for Enterprise Architecture (EA). For information on how to change the application scope, see Application picker.
2. Select the edit icon ( ).
3. On the Access Control page, in the **Requires role** section, select **Insert new row**.



4. On the pop-up window, enter the new role and select the save icon ( ).

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5. Select the header of the access control record and select **Save**.

   The new role is added to the **Define user access** section of the Define security controls page.

   Note: To know more about security in ServiceNow Otto AI agents with Access Control Lists (ACLs), see Implement access control in AI agents.

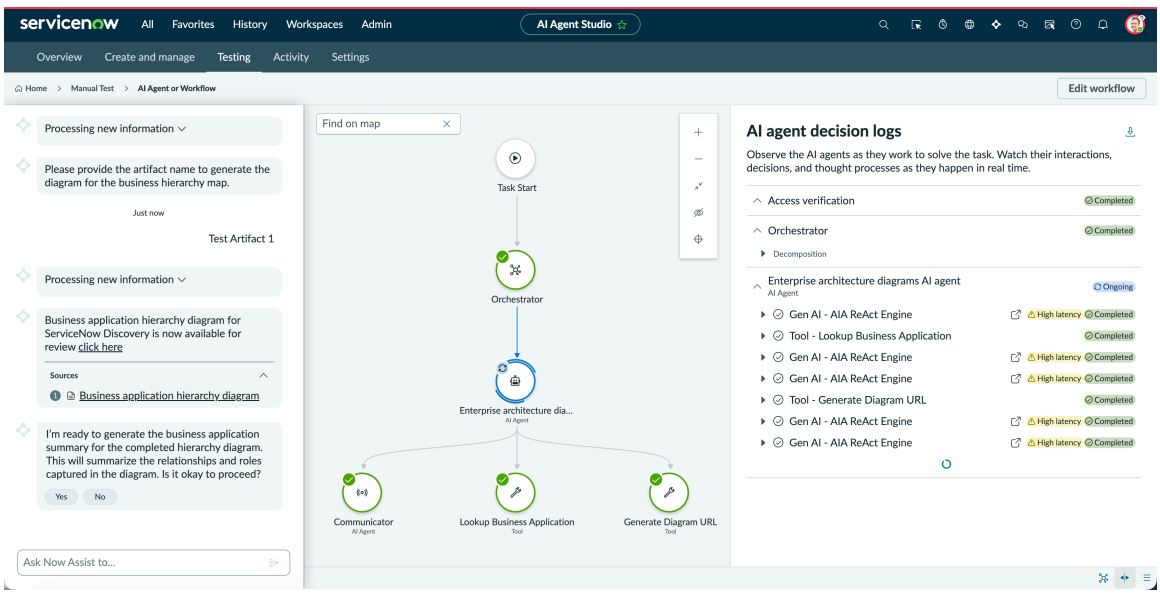
Also, on the Select channels and status page, do the following:

1. Enable the **Display** toggle for **Engage via the ServiceNow Otto panel**.
2. Select **Save and test**.
3. On the Test on example of behavior page, in the **Task** box, enter an instruction to test the Generate enterprise architecture diagram agentic workflow.

   An example instruction: **Create a business hierarchy map for XYZ business application**.

4. Select **Continue to test chat response**.

   The agent executes the request for the agentic workflow.



To view information on how to create AI agents and agentic workflows and how to use the AI Agent Studio, see the following:

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- AI Agent Studio
- Install the AI Agent Studio
- Configure AI agents
- Create an AI agent
- Create an agentic workflow
- Manually test the execution of an AI agent
- Manually test the execution of an agentic workflow

Working with Dashboards

Dashboards in Enterprise Architecture Workspace is a central, visual interface for monitoring, analyzing, and acting on enterprise architecture data. Dashboards provide a consolidated view of the health and performance of key portfolios such as application portfolio, business portfolio, information portoflio and technology portfolio.

Related topics

Generate insights for Enterprise Architecture Workspace dashboard widgets

Exploring dashboards in Enterprise Architecture Workspace

Generate insights for Enterprise Architecture Workspace dashboard widgets

You can use the conversational interface provided by AI Data Explorer ServiceNow Otto skill to query and analyze data from Enterprise Architecture Workspace dashboards. Instead of manually reviewing dashboard visualizations, you can use the AI Data Explorer to ask natural language questions to retrieve insights and identify trends.

Before you begin

Note: Depending on your license, you will have access to certain application features, generative AI skills, agentic workflows, and AI agents. For more information, see ServiceNow product tiers.

AI Data Explorer, Query Generation ServiceNow Otto skills must be activated. Also, AI Search must be configured. For information, see Configure AI Data Explorer and Query Generation skills.

Role required:

- sn_apm.apm_user and sn_apm.apm_read (to access EA workspace)
- now_assist_explorer_user (to use the AI Data Explorer feature)

About this task

You can ask questions about application portfolios, technology trends, business units, lifecycle stages, and other metrics displayed on the dashboard. You can use the AI Data Explorer to perform the following:

- Ask specific queries on metrics and dimensions displayed on the widgets
- Perform relationship analysis
- Ask follow-up questions to explore deeper into the insights
- Generate dashboards and graphs

You can ask AI Data Explorer the following types of queries.

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- Trend analysis queries
  - How have application counts changed over time?
  - What is the distribution of business applications by lifecycle stage?
  - How do application scores vary across business units?
- Comparative queries
  - Compare application counts across different technology types
  - Which business unit has the highest number of applications?
  - What is the difference between Windows and UNIX application counts?
- Specific metric queries
  - Which application family is most used?
  - What percentage of applications are in the retired lifecycle stage?
  - Show me business applications by user base

The AI Data Explorer also considers the filters applied on the dashboard page while generating insights.

You can use the AI Data Explorer on widgets that are based on the following tables:

- CI Scores (apm_app_score)
- Business Applications (cmdb_ci_business_app)
- Information Objects (cmdb_ci_information_object)
- Indicator Scores (apm_app_indicator_score)
- Total Cost of Ownership (sn_apm_tco)
- Capabilities (cmdb_ci_business_capability)
- Digital Interfaces(sn_apm_di_digital_interface)

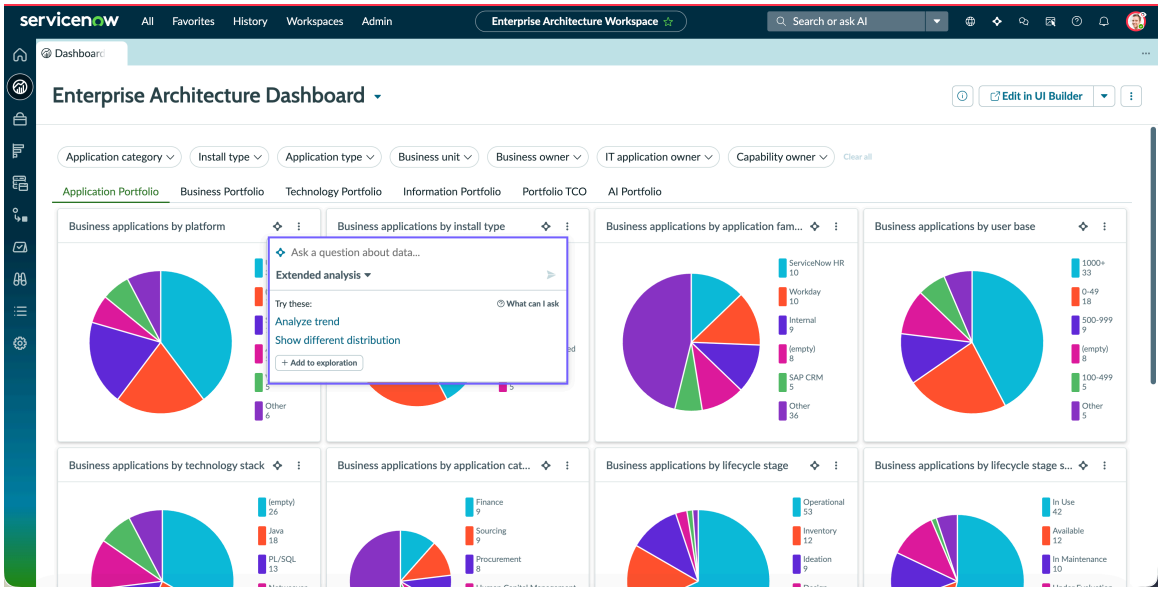
Note:

- The AI Data Explorer generates insights based on data from one widget at a time. It can't generate insights by combining or correlating data from multiple widgets simultaneously.
- The insights are displayed based on current data only and does not support time-series comparisons, such as comparing today's metric values against values from a previous period.

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace** > **Dashboard**.
2. Select the Explore with AI icon ( ) on any widget on the dashboard.
   The AI pop-up window appears.

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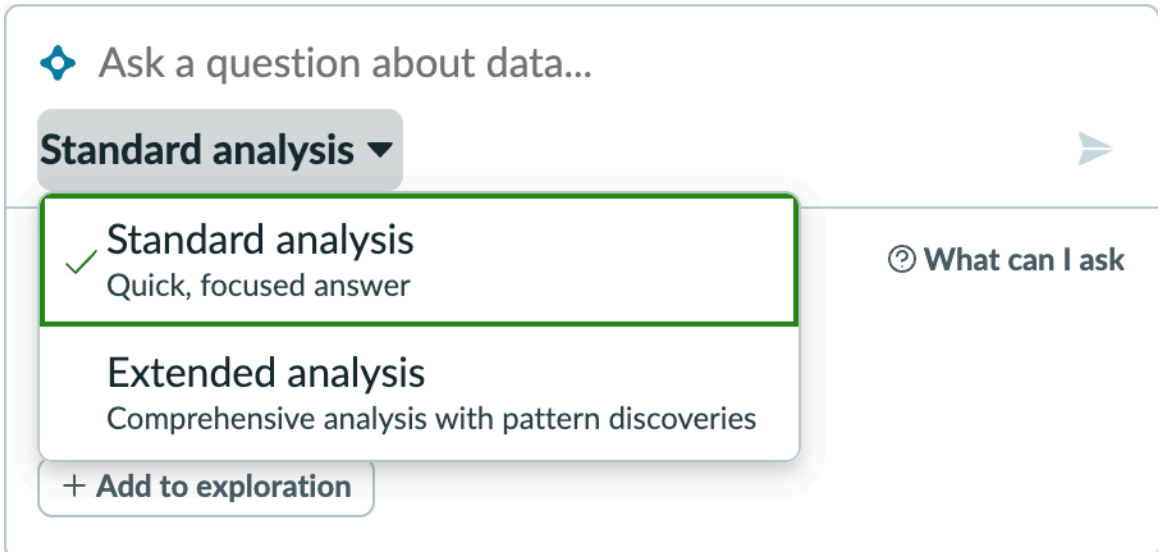
3. On the pop-up window, perform any of the following options.

UI element	Function
Text box	Use this option to ask any question related to the data associated with the selected widget. This option helps you get specific information on the widget data.
Analyze trend	Use this option to analyze overall trends in the data. This option helps you to understand how the metrics have changed over time or identify growth or decline patterns.
Show different distribution	Use this option to view the same data bro ken down by different dimensions. This op tion helps you to compare data distributions across alternative categorizations and view the data from different analytical perspec tives.
+ Add to exploration	Use this option to enable ServiceNow Otto to generate its own insights into the widget data.

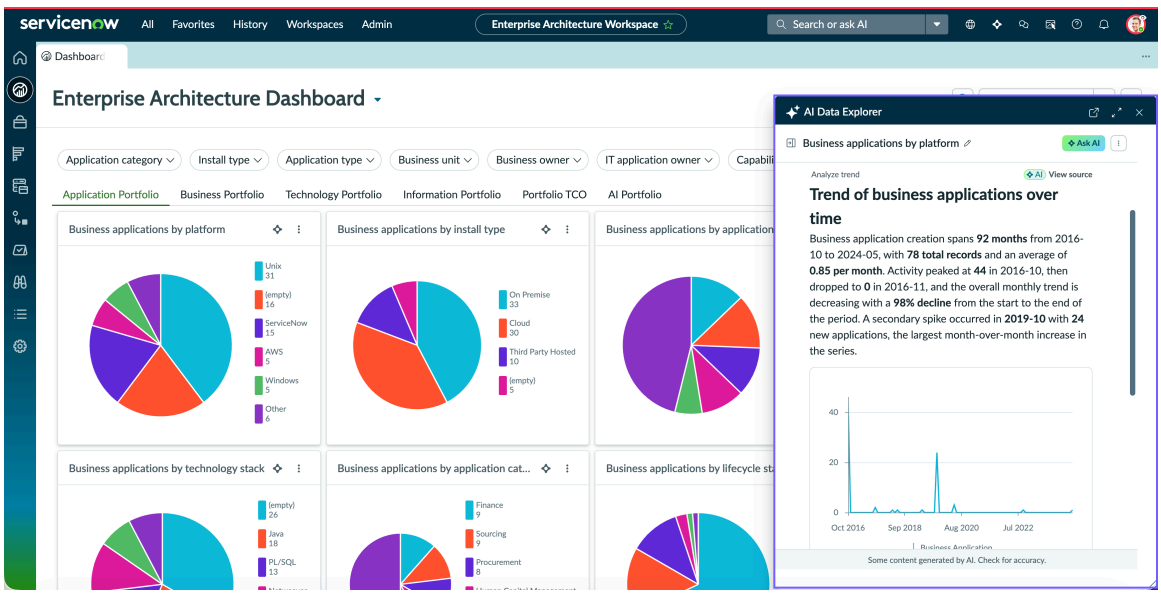
Note: You also have the option to choose your analysis mode. The available options are:

- **Standard analysis**: Use this option when you want quick and concise responses.
- **Extended analysis**: Use this option when you want to view deeper insights, trends, and patterns in the data.

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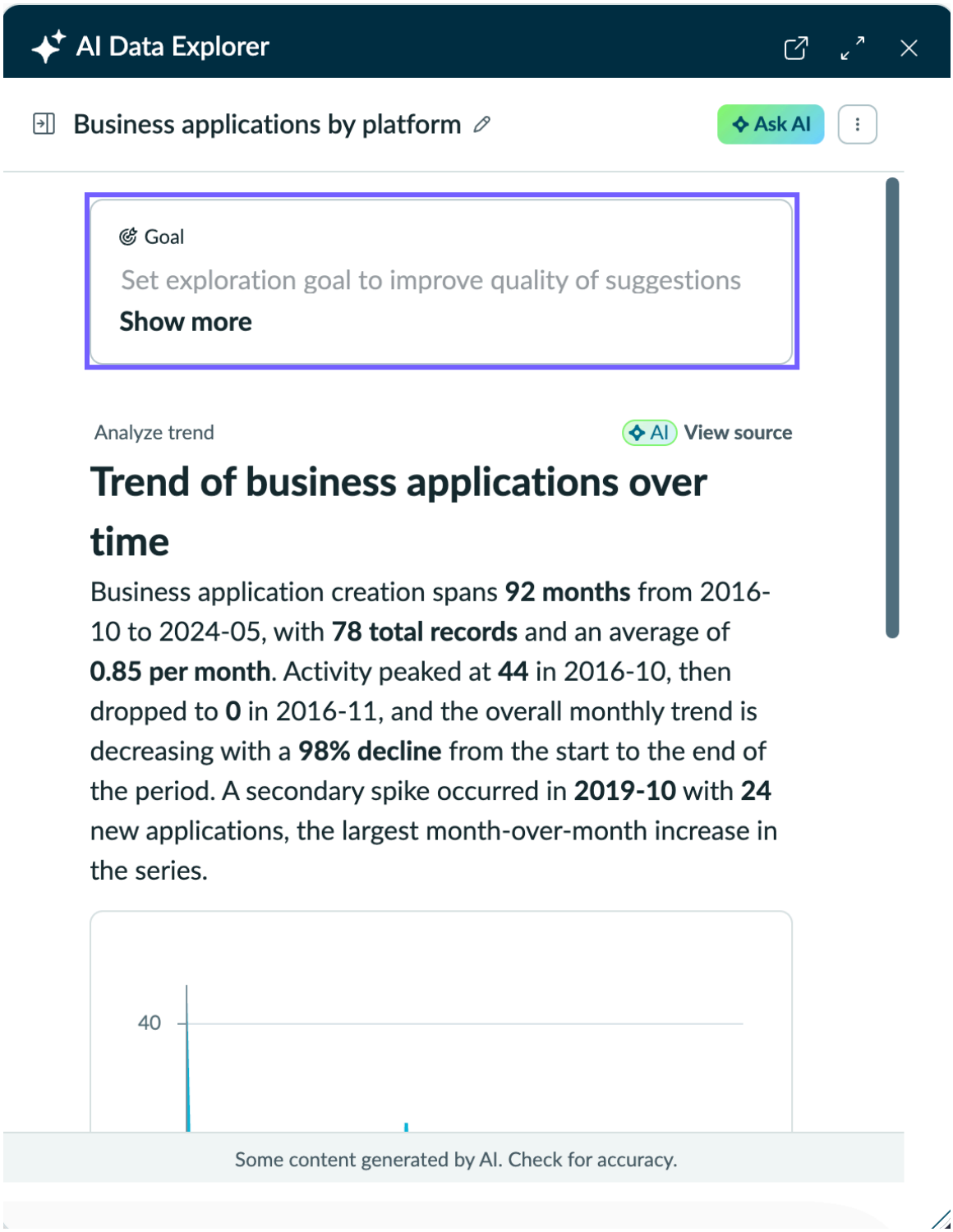
4. Enter your query or select any of the available options.
   The AI Data Explorer pop-up window appears displaying insights on the widget data. It also generates graphs or charts to complement the insights.



5. View the AI Data Explorer insights and take further actions.
   You can perform the following:

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- Define a goal in the **Goal** box for ServiceNow Otto to improve the quality of insights and suggestions.



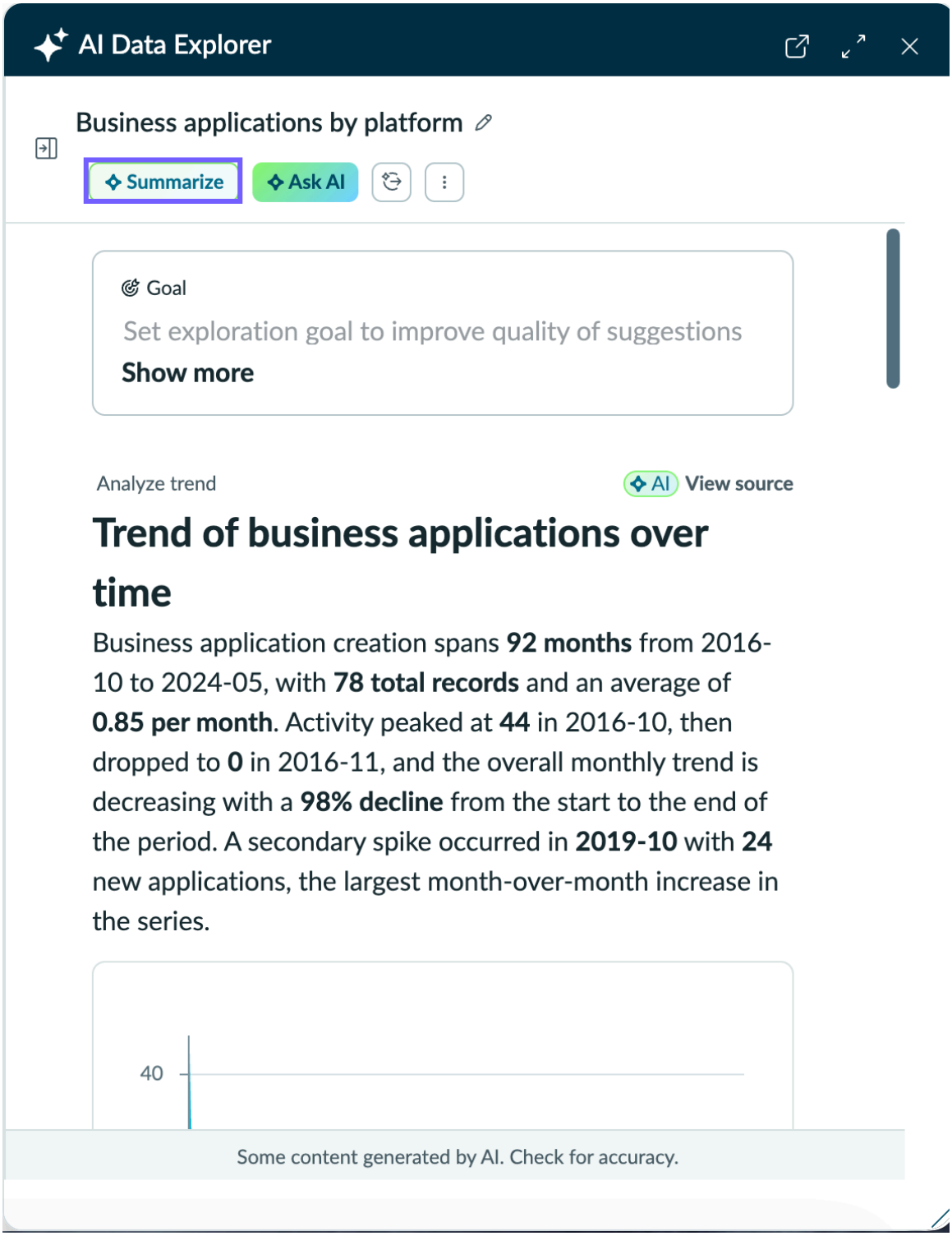
- Ask follow-up questions based on suggestions provided by ServiceNow Otto

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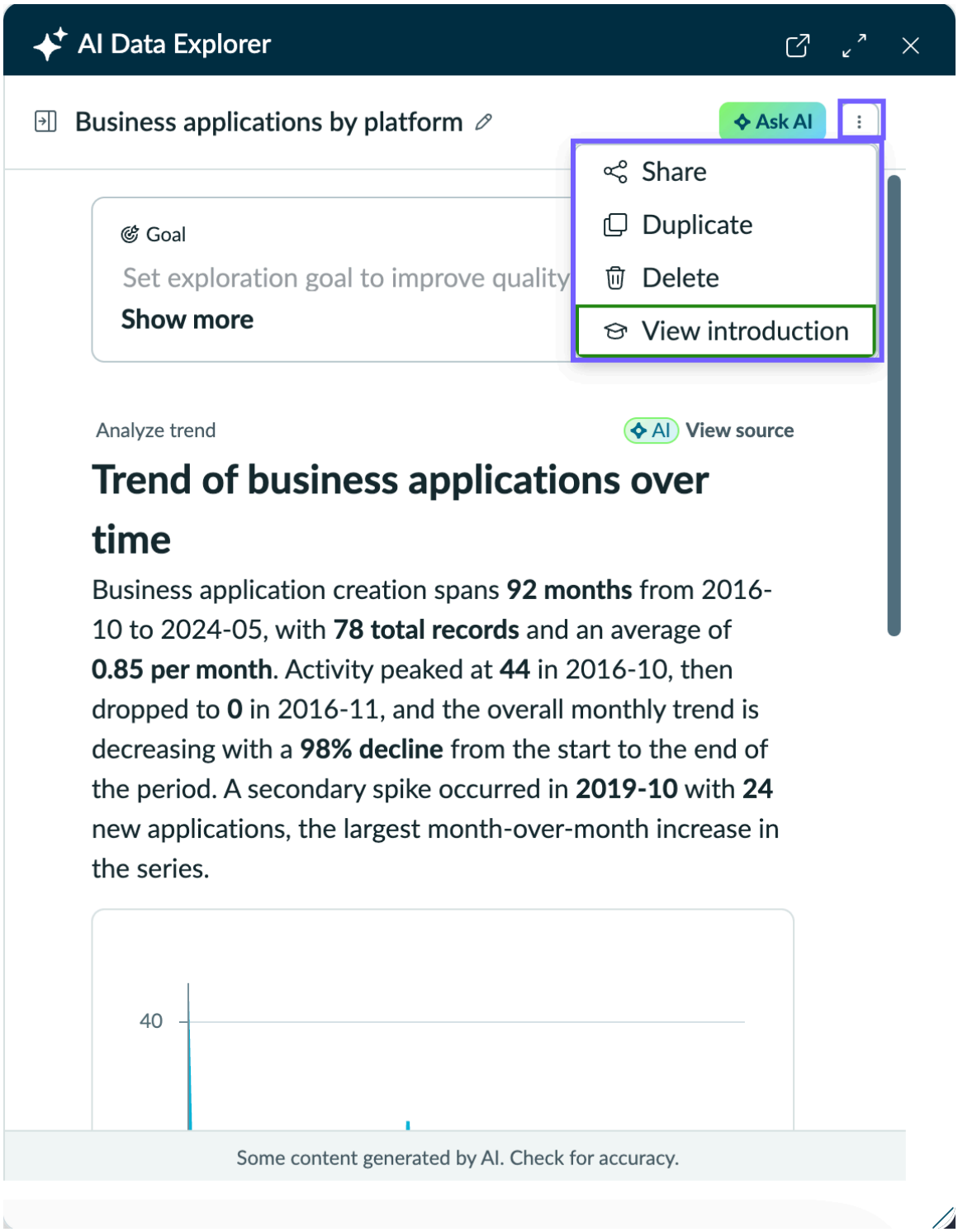
- Select **Summarize** to summarize the insights generated.

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- Share, duplicate, or delete the insights generated by AI Data Explorer by selecting the more actions icon (⋮).



Related topics

- Configure AI Data Explorer and Query Generation skills
- Explore the Enterprise Architecture Workspace dashboard
- Exploring ServiceNow Otto for Enterprise Architecture (EA)

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Configure ServiceNow Otto for Enterprise Architecture (EA)

ServiceNow Otto for Enterprise Architecture (EA) access roles

View application performance in Application Assessments dashboard

Use the Application Assessments dashboard to view overview reports on the performance of the business applications.

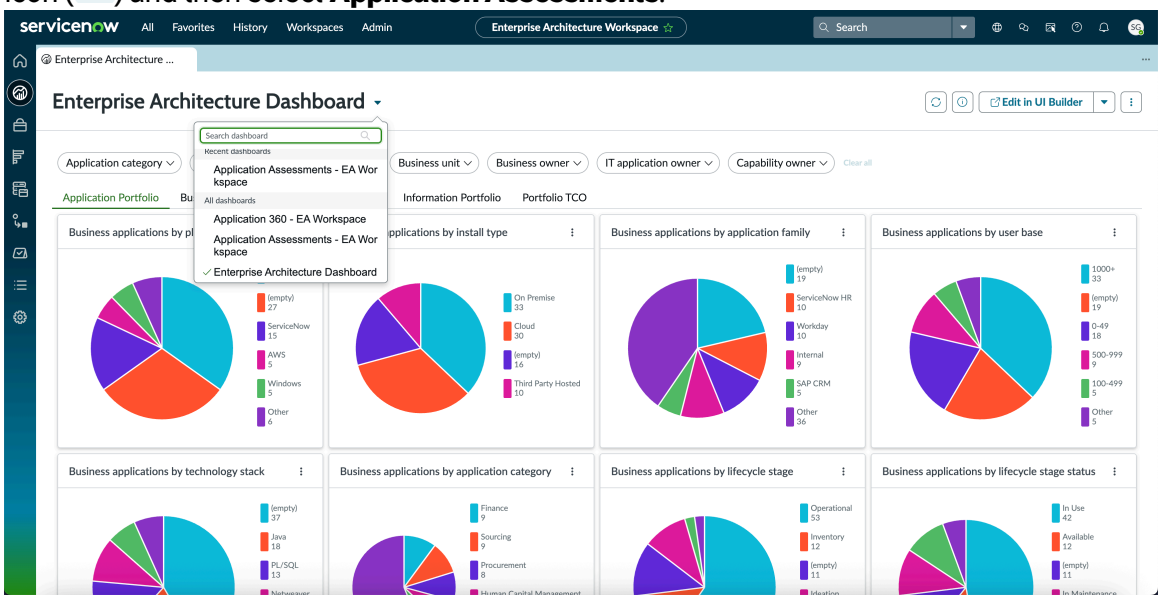
Before you begin

You must have Enterprise Architecture Workspace version 3.1.0 to view the Application Assessments dashboard in the Enterprise Architecture Workspace.

Role required: sn_apm.apm_analyst

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Enterprise Architecture Workspace Dashboard page by selecting the application dashboard icon ( ).
3. Open the Application Assessments dashboard page after selecting the change dashboard icon ( ) and then select **Application Assessments**.



4. Filter the data in the spline charts by selecting options from the **Application category**, **Business process**, and **Business unit** lists.

> **Note:** By default, scores for all applications are displayed in the widgets. You can select an application name to hide their score.

Related topics

Explore the Application Assessments dashboard

Monitor performance in Application 360 dashboard

Monitor performance in Application 360 dashboard

Use the Application 360 dashboard to analyze indicator scores and identify business applications that require attention.

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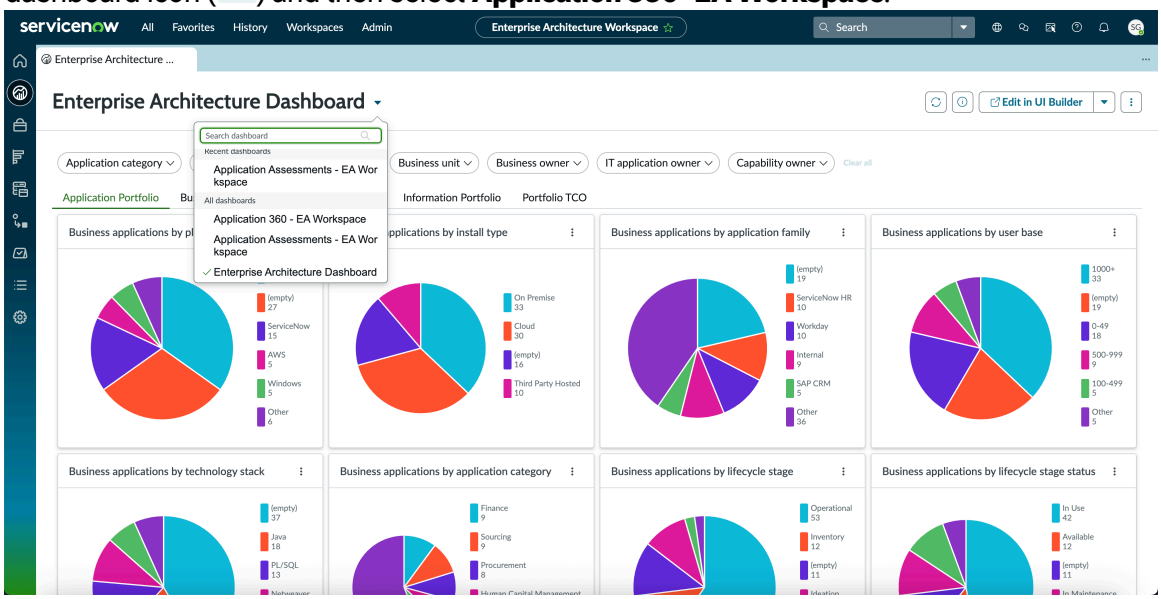
Before you begin

You must have Enterprise Architecture Workspace version 3.1.0 to view the Application 360 - EA Workspace dashboard in the Enterprise Architecture Workspace.

Role required: sn_apm.apm_analyst

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Enterprise Architecture Workspace Dashboard page by selecting the application dashboard icon ( ).
3. Open the Application 360 - EA Workspace dashboard page by selecting the change dashboard icon ( ) and then select **Application 360- EA Workspace**.



4. From the Business Application list, select the business application that you want to analyze indicator details for.
5. From the Breakdown list, select the type of breakdown that you want to see the trend and distribution details for.

Related topics

Explore the Application 360 dashboard in Enterprise Architecture Workspace

View application performance in Application Assessments dashboard

Working with the business portfolio module

Manage business capabilities, add sub-capabilities, associate business applications.

Note:

- Business applications marked as **Retired** or in **End of Life** lifecycle stage aren't displayed on the Business Portfolio page. However, you can view those business applications by updating the *sn_apm_ws.business_application_default_filter* system property. Contact your ServiceNow® account service manager to update the system property.
- You can zoom on this page or any of the child pages to 200% or 400% through your browser settings without the loss of content or functionality. Page layouts are transformed into a vertical, stacked view automatically.

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Add a business capability

Add a business capability to the capability hierarchy map.

Before you begin

Role required: sn_apm.apm_analyst

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Business Capability Hierarchy page by selecting the Business Portfolio icon ( ).
3. Select **New Capability**.
4. On the form, fill in the fields.
   For a description of field values, see Create business capability form.
5. Select **Create**.
6. Create a child capability for the capability that you created.
   a. Right-click on the hierarchy ID of the capability.
   b. Select **Create sub-capability**.

Related topics

- Create a demand towards achievement of a capability
- Update the hierarchy of a business capability
- Create a sub-capability
- Assign a business application
- Unassign a business application from a capability
- Delete a capability from the hierarchy
- View a roadmap of a business capability

Create a demand towards achievement of a capability

Use a demand as a step to identify cost-saving opportunities on capabilities, to meet the target. The strategy that you associate with the demand action decides the strategy for the capability.

Before you begin

Role required: sn_apm.apm_user

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Business Capability Hierarchy page by selecting the Business Portfolio icon ( ).
3. Select the row context menu icon ( ) and select **Create Demand**.
4. Select **Open in new tab**.
5. On the form, fill in the fields.
   For a description of the field values, see Demand form.
6. Select **Save** to save the record and remain on the same form to add more details to the demand.

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Related topics

- Assign a business application
- Unassign a business application from a capability
- Update the hierarchy of a business capability
- View a roadmap of a business capability
- Create a sub-capability
- Add a business capability
- Delete a capability from the hierarchy

Update the hierarchy of a business capability

Assign a hierarchy ID to a business capability.

Before you begin

Role required: sn_apm.apm_analyst

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Business Capability Hierarchy page by clicking the Business Portfolio icon ().
3. Select **Update Hierarchies**.
   A scheduled job is submitted to update the business capabilities hierarchy. Use the refresh button to see the updated hierarchy.

Result

A hierarchy ID is assigned to the newly created capability.

Related topics

- View all capability indicators
- Add or edit a capability indicator
- Assign a business application
- Unassign a business application from a capability
- View a roadmap of a business capability
- Create a sub-capability
- Add a business capability
- Delete a capability from the hierarchy
- Create a demand towards achievement of a capability

Create a sub-capability

Add a sub-capability to the capability hierarchy map.

Before you begin

Role required: sn_apm.apm_user

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Business Capability Hierarchy page by selecting the Business Portfolio icon ().

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3. Select the row context menu icon ⋮ and select **Create sub-capability**.
4. On the form, fill in the fields.
   For a description of the field values, see Create a sub-capability form.
5. Select **Create**.

Related topics

- Assign a business application
- Unassign a business application from a capability
- Update the hierarchy of a business capability
- View a roadmap of a business capability
- Add a business capability
- Delete a capability from the hierarchy
- Create a demand towards achievement of a capability

Assign a business application

Assign a business application to a capability to relate the capability with the application.

Before you begin
Role required: sn_apm.apm_user

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Business Capability Hierarchy page by selecting the Business Portfolio icon ().
3. Select the row context menu icon (⋮) and select **Assign business application**.
4. Select a business application.

   Note: You cannot assign business applications marked as **Retired** or in **End of Life** lifecycle stage.

5. Select **Assign**.

Related topics

- Unassign a business application from a capability
- Update the hierarchy of a business capability
- View a roadmap of a business capability
- Create a sub-capability
- Add a business capability
- Delete a capability from the hierarchy
- Create a demand towards achievement of a capability
- Generate insights into business applications

Unassign a business application from a capability

You can unassign a business application from a capability.

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Before you begin
Role required: sn_apm.apm_user

Procedure
1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Business Capability Hierarchy page by selecting the Business Portfolio icon ().
3. Select the expand row icon ( ) next to the relevant business capability.
4. Select the row context menu icon ( ) next to the relevant business application and select **Unassign business application**.

Related topics
- Assign a business application
- Update the hierarchy of a business capability
- View a roadmap of a business capability
- Create a sub-capability
- Add a business capability
- Delete a capability from the hierarchy
- Create a demand towards achievement of a capability
- Generate insights into business applications

Delete a capability from the hierarchy

Delete a capability that you no longer require.

Before you begin
Role required: admin

Procedure
1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Business Capability Hierarchy page by clicking the Business Portfolio icon ().
3. Right-click the hierarchy ID of a capability that you want delete, then select **Delete**
4. Confirm the deletion.

Related topics
- Assign a business application
- Unassign a business application from a capability
- Update the hierarchy of a business capability
- View a roadmap of a business capability
- Create a sub-capability
- Add a business capability
- Create a demand towards achievement of a capability

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View a roadmap of a business capability

View the roadmap of your business capabilities and align them with the organization's strategy. Creating a portfolio plan helps you plan, prioritize, and roadmap the work for your business capability.

Before you begin

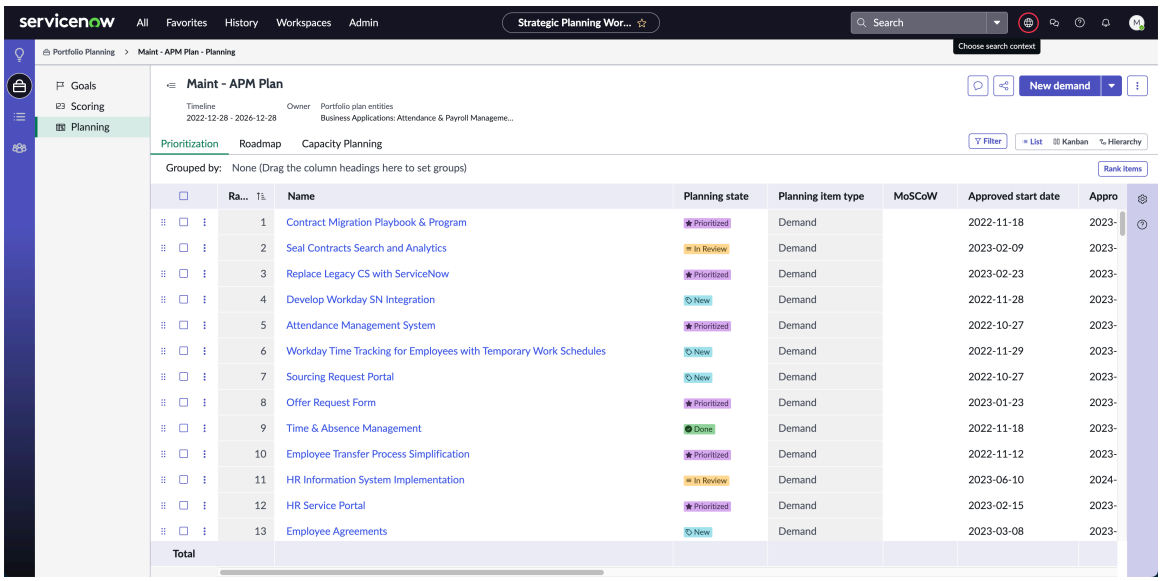
Ensure that the Strategic Planning plugin (com.sn_apw_advanced) (v4.0.2 or later) is installed.

Role required: sn_apm.apm_user and sn_align_core.apw_user

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Business Capability Hierarchy page by selecting the business portfolio icon ( ).
3. Select the row context menu icon ( ) and select **View roadmap**.
   You're navigated to the Planning page of the Strategic Planning Workspace. A temporary portfolio plan is created in the Strategic Planning Workspace with all the planning items that are associated with the business capability, sub-capabilities, and associated business applications.

   Note: The temporary portfolio plan is meant for preview purpose only. To plan, prioritize, and roadmap the work for your business capability, copy the temporary portfolio plan or create one.



4. **Optional:** Copy the portfolio plan for your business capability to plan, prioritize, and roadmap the work for your business capability.

   a. From the portfolio plan header, select the more actions icon ( ) and then select **Copy portfolio plan**.

   b. On the Copy portfolio plan window, fill in the details.

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i. Enter a name for the portfolio plan in the **Portfolio plan name** field.

ii. (Optional) Grant access to the users of the portfolio plan by selecting the **Share with same users and groups** option.

c. Select **Confirm**.

Alternatively, you can also create your own portfolio plan in the Strategic Planning Workspace (SPW) using the Business Capability lens. For more information, see Create a portfolio plan.

Related topics

- Add a business capability
- Create a demand towards achievement of a capability
- Update the hierarchy of a business capability
- Create a sub-capability
- Assign a business application
- Unassign a business application from a capability
- Delete a capability from the hierarchy

Export business portfolio data to Excel or CSV

Export the business portfolio list data to Microsoft Excel or CSV so that you can use the data to share with stakeholders and prepare for analysis.

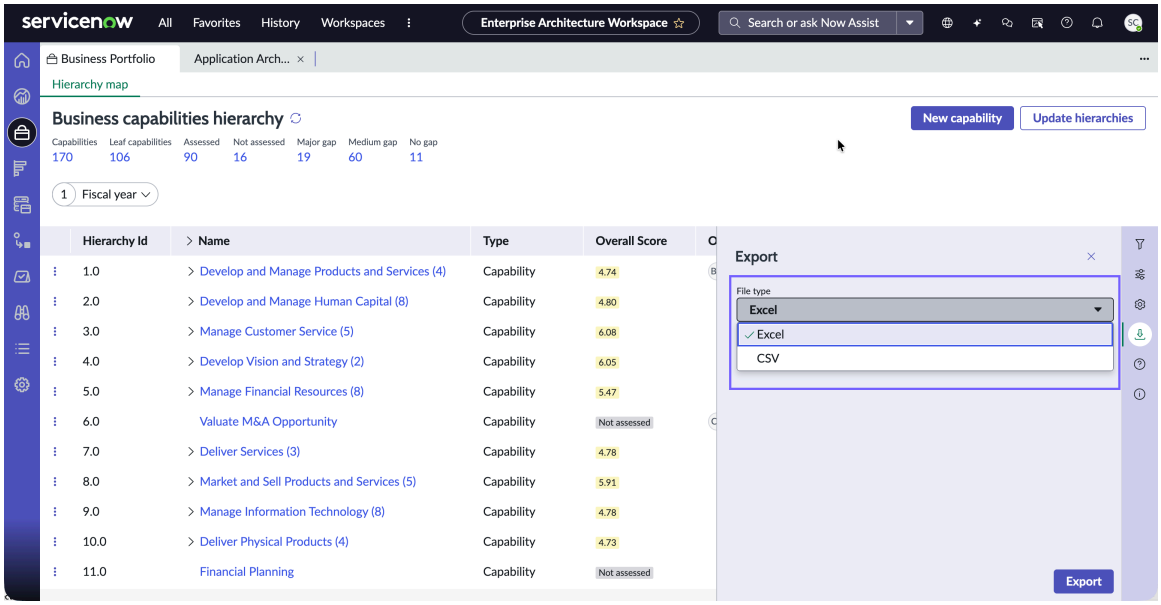
Before you begin

Role required: sn_apm.apm_user

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Business capabilities hierarchy page by selecting the Business Portfolio icon ( ).
3. Select the export icon ( ) on the Business capabilities hierarchy page.
4. From the File type drop-down on the Export window, select **Excel** or **CSV** to export the data to a Microsoft Excel or CSV file respectively.

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5. Select **Export**.

Result

A file with the selected format is downloaded and saved in your local system.

> **Note:** You can also include the business applications data associated with the business capabilities, in the downloaded file. You must select the Expand row icon ( ) next to a business capability to ensure that the associated business applications for that capability are displayed onscreen and then follow the export process. Doing this ensures that the business application data is also included in the downloaded file.

Working with application rationalization

Application rationalization helps enterprise architects evaluate, optimize, and govern the business application portfolio with clarity and strategic intent. Application rationalization is a structured process to assess all business applications by category, capability, or family and determine whether to invest, sustain, migrate, or retire.

You can view all the business applications in a bubble chart view or in a list view. However, business applications marked as **Retired** or in **End of Life** lifecycle stage aren't displayed on the Application Rationalization bubble chart or list view pages. However, you can view those business applications by updating the *sn_apm_ws.business_application_default_filter* system property. Contact your ServiceNow® account service manager to update the system property.

Use bubble chart view

The bubble chart view visually positions applications across four quadrants using configurable X and Y axes. The color-coded bubbles reflect planned disposition values to quickly identify which applications align with strategic goals.

> **Note:** You can zoom on this page to 200% or 400% through your browser settings without the loss of content or functionality. Page layouts are transformed into a vertical, stacked view automatically.

Analyze applications using the bubble chart

Consolidate and analyze the business applications based on multiple scores.

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Before you begin
Role required: sn_apm.apm_analyst

About this task
You can narrow down the number of business applications that may be viewed, based on their application indicator scores.

You can also generate insights into business applications using Now Assist. For information, see Generate insights into business applications.

Procedure
1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Application Rationalization page by selecting the application rationalization icon ( ).
3. Select **Bubble chart**.
4. Modify the bubble chart parameters as required by selecting the settings icon ( ).

   The following settings are available for modification:

   - X and Y axis: Dimension of the indicators that fall into the X and Y-axis. The available options are derived from the Application Bubble Charts table [apm_bubble_chart]. The indicator scores are gathered from the Indicator Scores table (apm_app_indicator_score).

     Note:
     - For details on how to add the X and Y-axis indicators of the bubble chart, see Add or edit an application indicator.
     - For a bubble to be displayed on the bubble chart, the indicator scores for the selected fiscal period must be available for both X and Y-axis indicators.

   - Bubble size: The bubble size is based on indicators related to business applications. The indicator scores determine the size of the bubble.

     You can also create your own application indicators to analyze business applications in the bubble chart. For information on how to create custom application indicators, see Add or edit an application indicator.

     Note:
     - The created indicator must also be attached to the default application profile. For information on how to attach new profile indicators with a scoring profile, see Attach a profile indicator to a scoring profile.
     - If the created indicator isn't displayed in the bubble size list, make sure that the indicator is active. For information on how to activate an indicator, see Activate or turn off an application or capability indicator.

   - Bubble color: The bubble color is based on the planned disposition value of the application. You can refer to the legend displayed on the bubble chart to see the significance of each color.

     Note: The bubble color settings can't be modified.

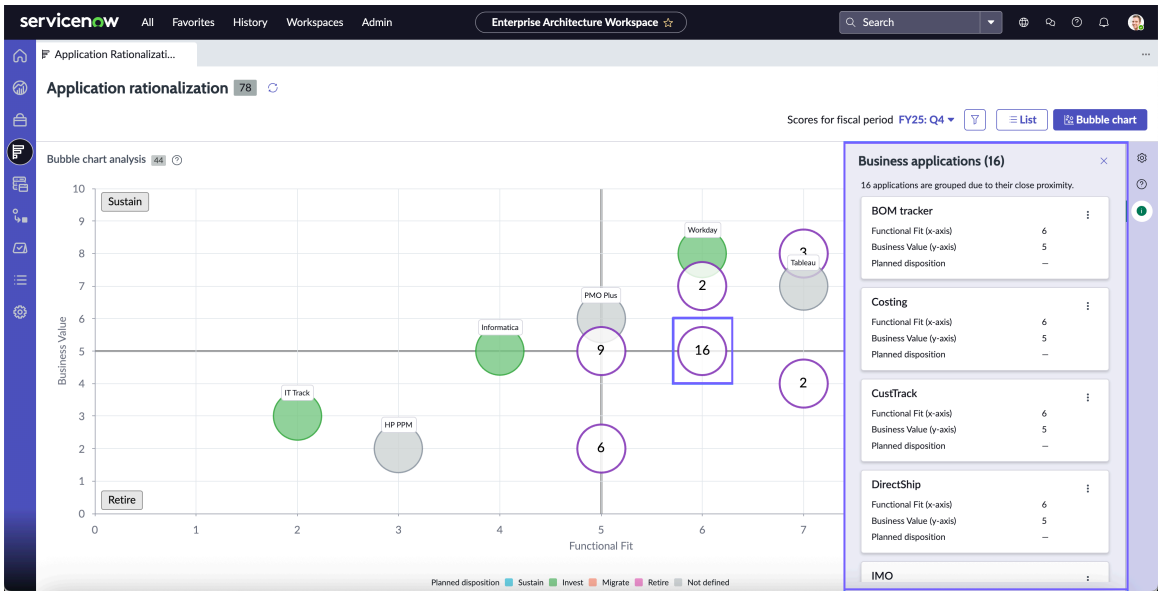
   - Bubble labels: Enable the toggle to display the bubble labels in the bubble chart. The bubble labels represent the business application names.

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The bubble chart displays up to 500 bubbles representing business applications, by default. If you want to see more than 500 bubbles, you can configure the *sn_apm_ws.appRationalizationMaximumBubbles* system property. For details, see Change the number of bubbles displayed on the bubble chart.

5. Select **Apply**.
   Business application bubbles are displayed on the bubble chart.

   Business application bubbles whose X and Y-axis values are within the value range of +/-0.25 of each other, are grouped. A grouped bubble displays the total number of business application bubbles that it contains. One selecting a grouped bubble, the info pane appears, displaying the list of individual business applications that are part of the grouped bubble.



Related topics

Create a demand using the bubble chart

Set the planned disposition of a business application

Add business application lifecycle data using bubble chart

Create a demand using the bubble chart

Create a demand for an application from the bubble chart.

Before you begin

Role required: sn_apm.apm_analyst

About this task

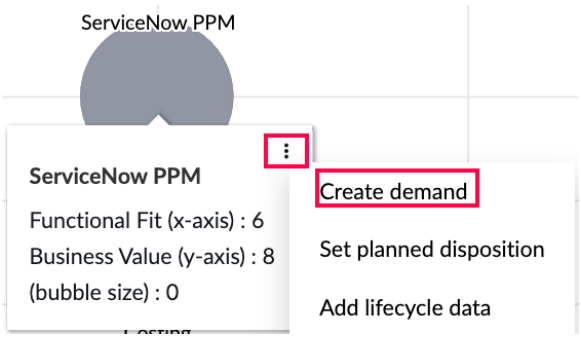
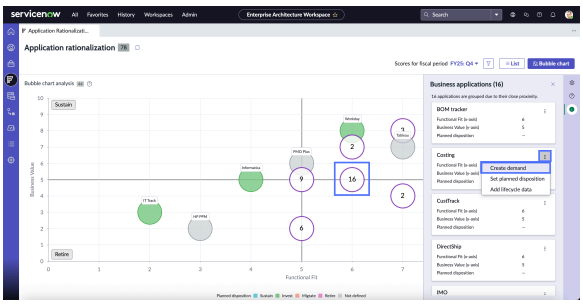
Use a demand as a step to identify cost-saving opportunities on the business applications and meet your targets. The strategy that you associate with the demand action decides the strategy for the application.

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Application Rationalization page by selecting the application rationalization icon ( ).
3. Select **Bubble chart**.

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4. Select the bubble for the relevant application that you want to create a demand for perform the following.

Bubble type	Action
Single bubble	**a.** Select a single bubble. **b.** In the pop-up window, select the context menu icon (⋮) and select **Create demand**. 
Grouped bubble	**a.** Select a grouped bubble. The info pane appears, displaying the list of individual business applications that are part of the grouped bubble. **b.** Select the context menu icon next to (⋮) and select **Create demand**. 

5. On the Create demand form, fill in the fields.
   For a description of the field values, see Create demand form.
6. Select **Create**.

Related topics

Analyze applications using the bubble chart

Add business application lifecycle data using bubble chart

Set the planned disposition of a business application

Set the planned disposition of a business application

Set the planned disposition of a business application to track decisions on the plan of the application.

Before you begin

Role required: sn_apm.apm_analyst

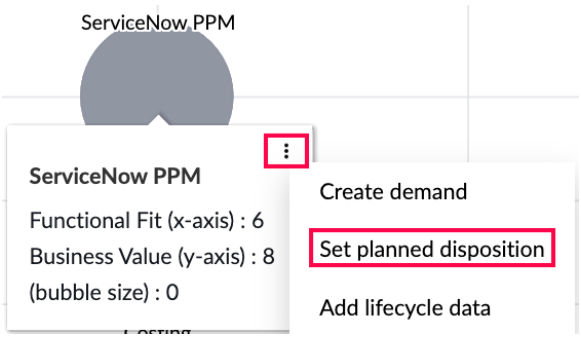
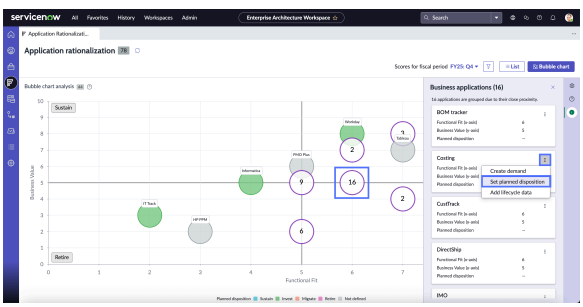
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About this task

Setting the planned disposition of a business application results in better data maintenance, improved data findability, and better management of application maintenance costs.

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Application Rationalization page by selecting the application rationalization icon ( ).
3. Select **Bubble chart**.
4. Select the bubble for the relevant application that you want to set the planned disposition for and perform the following.

Bubble type	Action
Single bubble	**a.** Select a single bubble. **b.** In the pop-up window, select the context menu icon (⋮) and select **Set planned dis position**. 
Grouped bubble	**a.** Select a grouped bubble. The info pane appears, displaying the list of individual business applications that are part of the grouped bubble. **b.** Select the context menu icon next to (⋮) and select **Set planned disposition**. 

5. In the Set planned disposition window, do the following:

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Planned disposition type	Actions available
Invest	**a.** Select the planned disposition status from the Planned disposition drop-down list. **b.** Enter the justification for selecting that planned disposition status in the **Reasoning** field.
Sustain	**a.** Select the planned disposition status from the Planned disposition drop-down list. **b.** Enter the justification for selecting that planned disposition status in the **Reasoning** field.
Migrate	**a.** Select the planned disposition status from the Planned disposition drop-down list. **b.** Select the migration strategy for the business application in the **Migration Strategy** field. **c.** Select the target business application to which the existing business application will be migrated to, in the **Target Business Application** field. **d.** Select a target date for the planned disposition in the **Planned disposition date** field. The target date must be the current date or a future date. **e.** Enter the justification for selecting that planned disposition status in the **Reasoning** field.
Retire	**a.** Select the planned disposition status from the Planned disposition drop-down list. **b.** Select a target date for the planned disposition in the **Planned disposition date** field. The target date must be the current date or a future date. **c.** Enter the justification for selecting that planned disposition status in the **Reasoning** field.

6. Select **Update**.

Related topics

- Analyze applications using the bubble chart
- Create a demand using the bubble chart
- Add business application lifecycle data using bubble chart

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Add business application lifecycle data using bubble chart

Create or edit the life cycle of a business application to manage the business application.

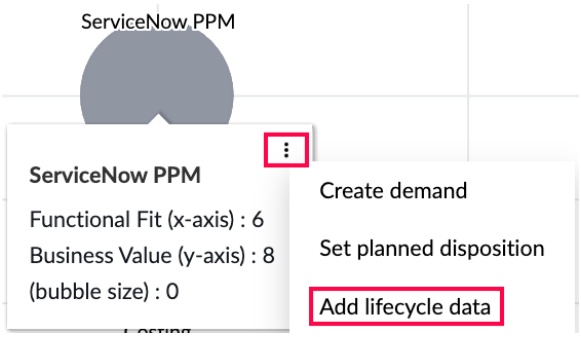
Before you begin

The application model (field name: Model ID) is required to create an application model lifecycle for a business application. The application model ID can either be entered manually or can be automatically created and added to the business application by executing or scheduling the *CSDM Product Model Assignment* script. For details on how to run the *CSDM Product Model Assignment* script, see Generate an application model for business applications.

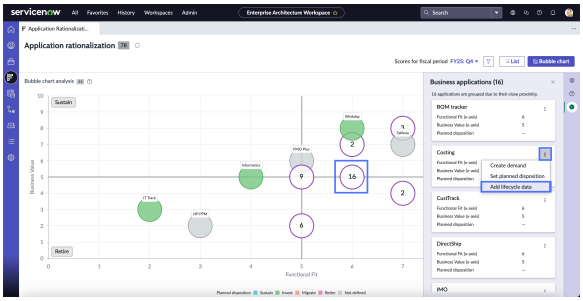
Role required: sn_apm.apm_analyst

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Application Rationalization page by selecting the application rationalization icon ( ).
3. Select **Bubble chart**.
4. Select the bubble for the relevant application that you want to add business application life-cycle data for and perform the following.

Bubble type	Action
Single bubble	**a.** Select a single bubble. **b.** In the pop-up window, select the context menu icon ( ) and select **Add lifecycle data**. 
Grouped bubble	**a.** Select a grouped bubble. The info pane appears, displaying the list of individual business applications that are part of the grouped bubble.

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Bubble type	Action
	b. Select the context menu icon next to (⋮) and select **Add lifecycle data**. 

5. On the Application model life-cycle details form, fill in the fields.
   For a description of the field values, see Application model life-cycle details form.
6. Select **Create**.

Related topics

- Analyze applications using the bubble chart
- Create a demand using the bubble chart
- Set the planned disposition of a business application

Edit business application details in bubble chart view

You can make updates to the business application record directly from the list, without leaving the bubble chart view.

Before you begin

Role required: sn_apm.apm_analyst

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Application Rationalization page by selecting the application rationalization icon ( ).
3. Select **Bubble chart**.
4. Select the business application that you want to edit details for.

Bubble type	Action
Single bubble	Select a single bubble. The side panel ap pears and the business application details are displayed. To edit the business applica tion, select the **Details** tab. **Note:** Select **Full details** to view more details about the business application. If the trigger type of the ServiceNow Otto Busi ness application insights skill is set to **Auto matic**, the side panel opens on the **Insights** tab instead. For information on the trigger

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Bubble type	Action
	type, see Configure ServiceNow Otto for Enterprise Architecture (EA).
Grouped bubble	**a.** Select a grouped bubble. The side panel appears, displaying the list of individual business applications that are part of the grouped bubble. **b.** Select a business application. The business application details are displayed. ▪ To edit the business application, select the **Details** tab. ▪ If the trigger type of the ServiceNow Otto Business application insights skill is set to **Automatic**, the side panel opens on the **Insights** tab instead. For information on the trigger type, see Configure ServiceNow Otto for Enterprise Architecture (EA). **Note:** Select **Full details** to view more details about the business application.

5. On the Business application form, fill in the fields.

   For a description of the field values, see Business application form.

6. Select **Update**.

Related topics

Use bubble chart view

Bubble chart view of application rationalization

Rationalization of business applications

Generate insights into business applications

Change the number of bubbles displayed on the bubble chart

Customize the *sn_apm_ws.appRationalizationMaximumBubbles* system property to change the number of bubbles displayed on the application rationalization bubble chart page.

Before you begin

Role required: sn_apm.apm_admin

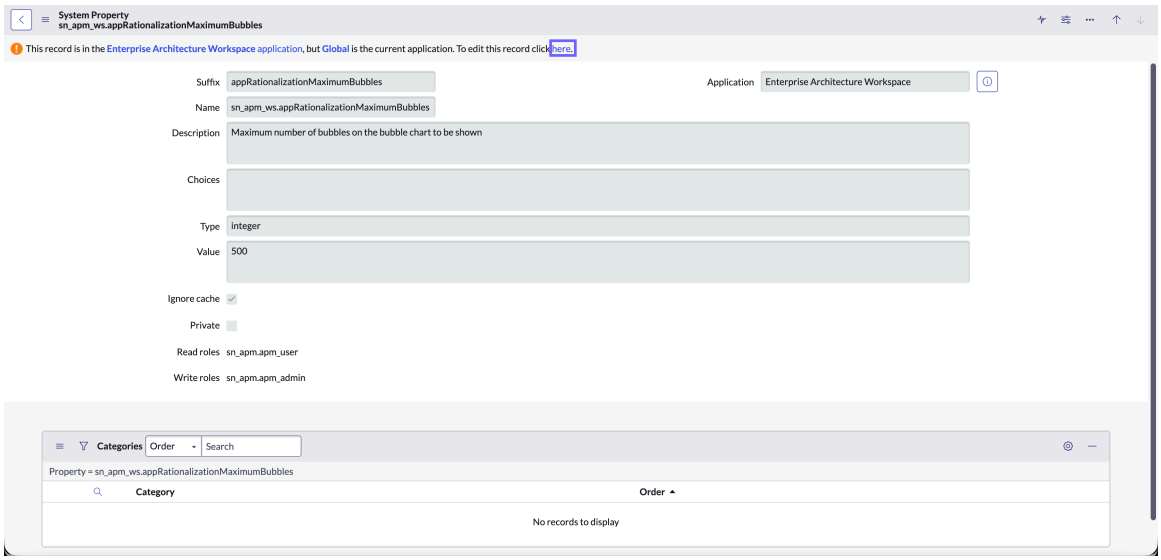
About this task

By default, the bubble chart page displays a maximum of 500 bubbles. If you have more than 500 assessed business applications in your application landscape, configure the *sn_apm_ws.appRationalizationMaximumBubbles* system property to increase this limit. This displays all assessed applications as bubbles on the bubble chart page.

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Procedure

1. Select **All** and in the navigation filter enter *sys_properties.list*.
2. Navigate to the *sn_apm_ws.appRationalizationMaximumBubbles* system property.
3. Select **here** to update the property details.



4. In the **Value** field, enter the maximum number of bubbles you want displayed on the bubble chart page of application rationalization.
5. Select **Update**.

Result

The bubble chart page displays bubbles up to the number that you have defined in the **Value** field.

Use case: How indicator scores appear on the bubble chart

Understand how application indicator scores are calculated and displayed as bubbles on the Application Rationalization bubble chart.

Scenario

Acme Corp's enterprise architecture team wants to rationalize its application portfolio using the TIME framework — a model developed by Gartner that classifies applications into four disposition categories:

- Tolerate — keep the application running for now, but do not invest further.
- Invest — actively develop and grow the application.
- Migrate — move the workload to a better alternative platform or application.
- Eliminate — retire or decommission the application.

In EA Workspace, these dispositions surface as Sustain (Tolerate/Invest), Migrate, and Retire (Eliminate) labels on the bubble chart quadrants.

Acme Corp evaluates five business applications on two dimensions:

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- **Business Value** — how much value the application delivers to the business, gathered from stakeholder surveys.
- **Technical Risk** — how much technical risk the application carries, gathered from stakeholder surveys.

The bubble chart in EA Workspace plots these two dimensions on the X and Y axes, letting architects visually identify rationalization decisions.

Note: The bubble color reflects the planned disposition set for each application. The legend at the bottom of the chart shows what each color means. The bubble color settings cannot be modified.

What is a scoring profile?

A scoring profile (apm_application_profile) is the central configuration object that defines how business applications are evaluated. It acts as the bridge between your indicators and your applications.

Note: The sn_apm_ws.app_indicator_scoring_profile system property accepts only a single sys_id. Comma-separated values are not supported. If you enter multiple values, the bubble chart falls back to the Default Application Profile and ignores your custom profile.

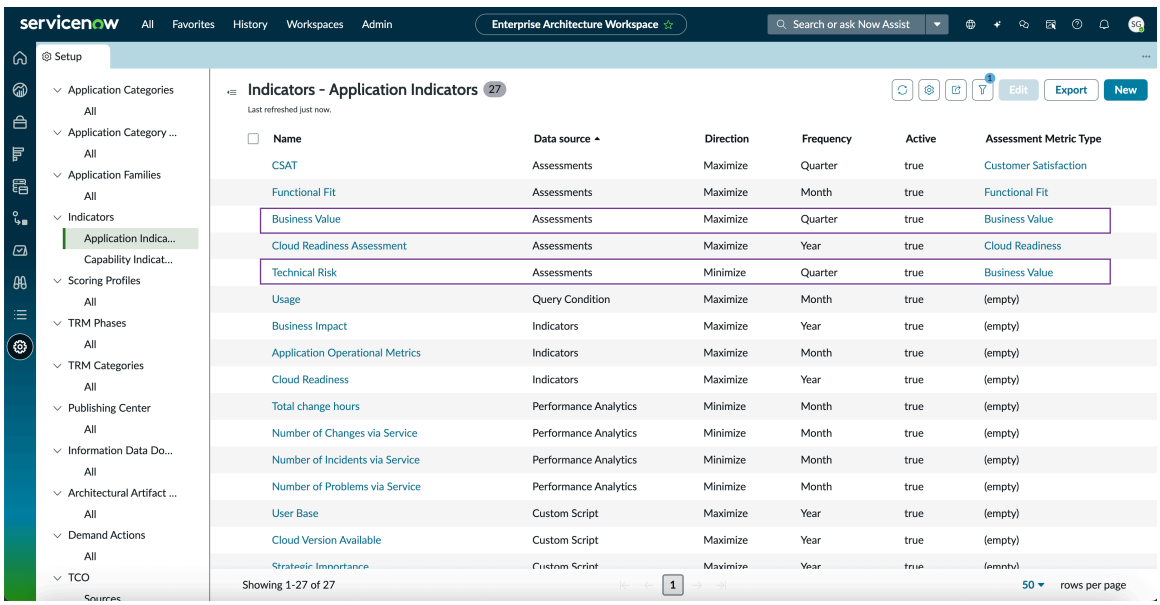
Step 1: Set up indicators

As an EA admin user, navigate to **Workspaces** > **Enterprise Architecture Workspace** > **Setup** > **Indicators** and confirm that two default indicators are active:

Indicator configuration

Indicator	Data source	Direction	Frequency
Business Value	Assessment	Maximize	Quarter
Technical Risk	Assessment	Minimize	Quarter

Business Value uses Maximize because a higher score is better. **Technical Risk** uses Minimize because a higher risk score is worse — the system inverts the normalized value so that riskier applications appear lower on the chart axis.



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Note: No new indicators need to be created for this use case. Both are available by default in the Default Application Profile. For information on how to create custom indicators, see Add or edit an application indicator.

How Minimize Direction Affects Chart Position

For Minimize-direction indicators, the score is inverted before being plotted. A raw score of 0 (zero risk) results in a normalized value of 1.0, which after inversion is set to 10.0 — the highest position on the axis. A raw score at the maximum (highest risk) inverts to 1.0 — the lowest position. The value 10 on the Y-axis means least risky, and 1 means most risky, for a Minimize indicator.

Maximize direction (Business Value)	Minimize direction (Technical Risk)
Higher raw score → higher normalized value → higher position on axis. A Business Value raw score of 85 normalizes to 10.0 — the top of the axis.	Higher raw score = worse condition. The system inverts the normalized value. A Technical Risk raw score of 90 (most risky) normalizes to 10.0 first, then inverts to 1.0 — the bottom of the axis
Formula: Normalized Value = (((raw - min) / (max - min)) × 9) + 1	Formula: Adjusted = (10 - Normalized Value) + 1 ← inversion step
Raw = 0 → Normalized = 1.0 (lowest on chart) Raw = max → Normalized = 10.0 (highest on chart)	Raw = 0 → Normalized = 1.0 → Inverted = 10.0 (highest on chart — zero risk is best!) Raw = max → Normalized = 10.0 → Inverted = 1.0 (lowest on chart — maximum risk is worst)

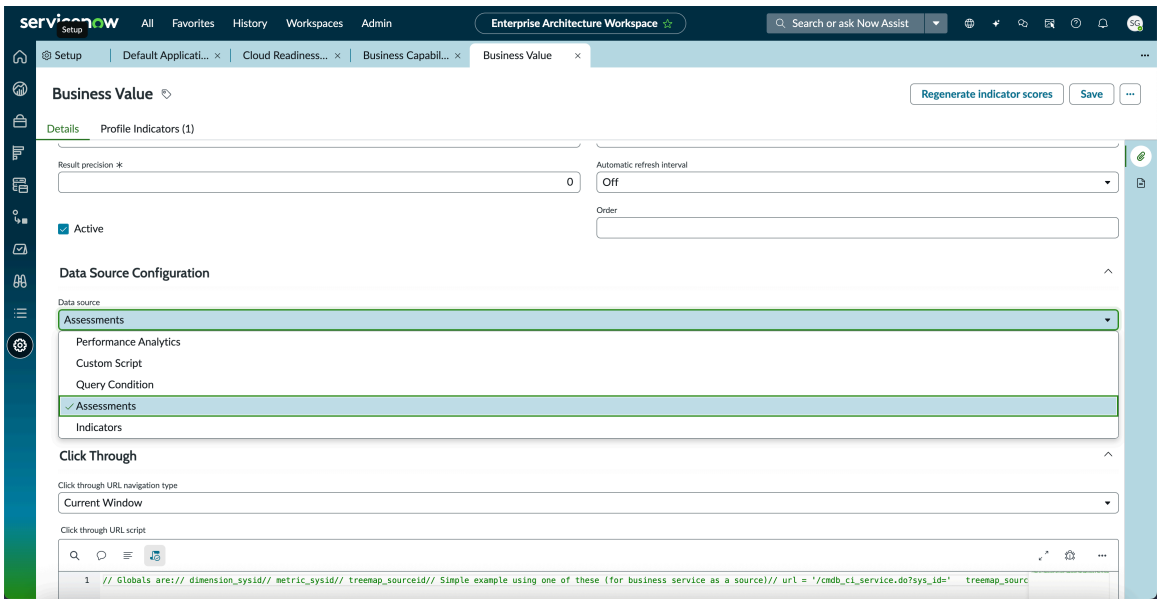
Indicator data sources

This use case uses Assessments as the data source, but EA Workspace supports five data source types. The choice of data source depends on what data is available and how frequently it is updated:

Data source	How it works	Example indicators	Best used for
Assessments	Survey-based ratings collected from stakeholders via the Service Portal. Assessors rate each application on a defined scale.	Business Value, Technical Risk, and Functional Fit	This use case
Performance Analytics (PA)	Scorecard data from an existing PA indicator (For example: incident count, change volume). Automatically sourced — no manual surveys are needed.	Number of Incidents via Service and Number of Changes via Service	Operational health indicators
Custom Script	A script that returns a per-application weight. Useful for	Portfolio TCO and Overall Score	Financial and composite indicators

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Data source	How it works	Example indicators	Best used for
	complex calculations or external data lookups.		
Query Condition	A configurable table query (For example: count open vulnerabilities per app). No code required.	Usage (active users)	Simple count-based indicators
Indicators	Aggregates scores from child indicators into a parent indicator score.	Application Operational Metrics, and Business impact	Roll-up and composite scoring



Note: Indicators from different data source types can coexist in the same scoring profile. For example, a profile might combine an Assessments indicator (Business Value), a Performance Analytics indicator (Number of Incidents), and a Custom Script indicator (Portfolio TCO). Each indicator type feeds into the same normalization and scoring pipeline regardless of its data source.

Applications Not Assessed — Visibility on the chart

If a business application has not been assessed for one or both axis indicators for the selected fiscal period, it will not appear on the bubble chart. A bubble requires indicator scores for both the X-axis and Y-axis indicator for the same fiscal period.

Applications with scores for only one axis are silently excluded. This applies regardless of data source type. An application that was not included in a PA breakdown, not assessed in a survey, or not returned by a custom script will have no score record. Therefore, no bubble is displayed.

To identify applications that are scored on one axis but not the other:

- Navigate to apm_app_indicator_score.list
- Filter by fiscal period = the period shown on the chart Filter by indicator = your X-axis indicator
- Compare the configuration item list to the same filter for your Y-axis indicator

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Applications missing from either list will not render a bubble.

Note: When an application is newly added to the portfolio after assessments have been generated, its assessment questions are not automatically included in existing assessment instances. You must regenerate assessments from the indicator's record to include new applications in the next assessment cycle.

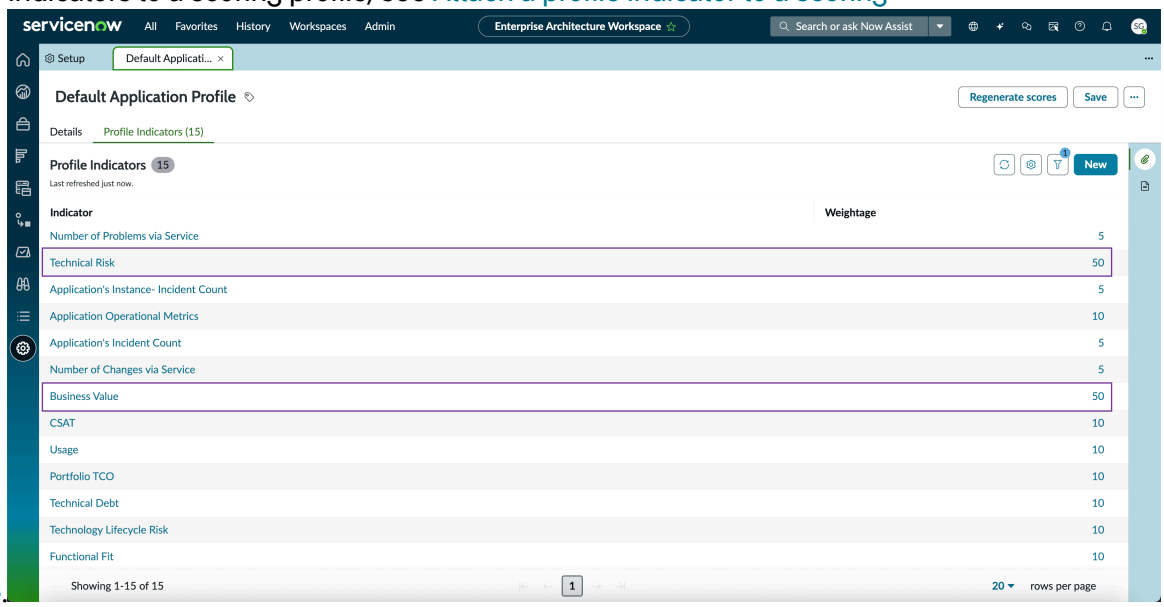
Step 2: Set up the scoring profile

As an admin, navigate to **Workspaces** > **Enterprise Architecture Workspace** > **Setup** > **Scoring Profiles** > **Default Application Profile** and confirm that both indicators are listed in the Profile Indicators related list with the following weights:

Scoring profile — indicator weights

Indicator	Weight
Business Value	50
Technical Risk	50

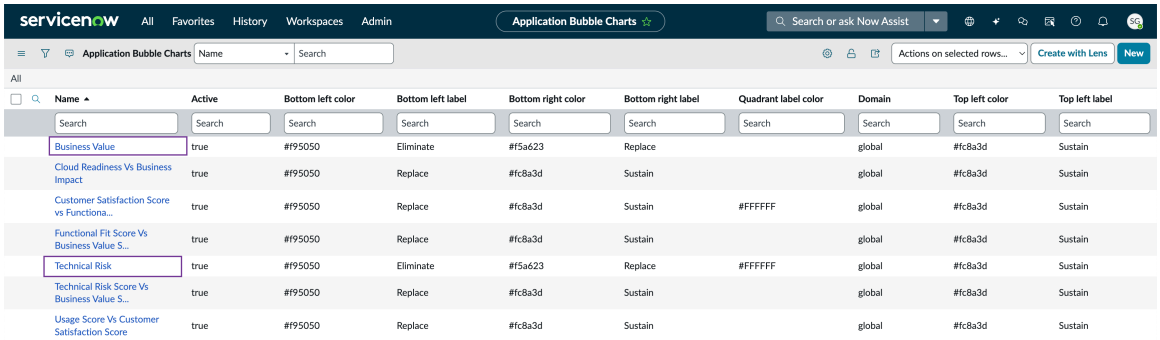
Equal weights mean each indicator contributes equally to the overall application score. Verify that all five business applications have their **Application scoring profile** field set to **Default Application Profile**. For information on how to attach profile indicators to a scoring profile, see Attach a profile indicator to a scoring profile.



Step 3: Add indicators to the bubble chart table

Navigate to the Application Bubble Chart [apm_bubble_chart] table and confirm that both **Business Value** and **Technical Risk** are registered. The available X and Y axis options on the bubble chart are derived from this table. The indicator scores are gathered from the Indicator Scores [apm_app_indicator_score] table.

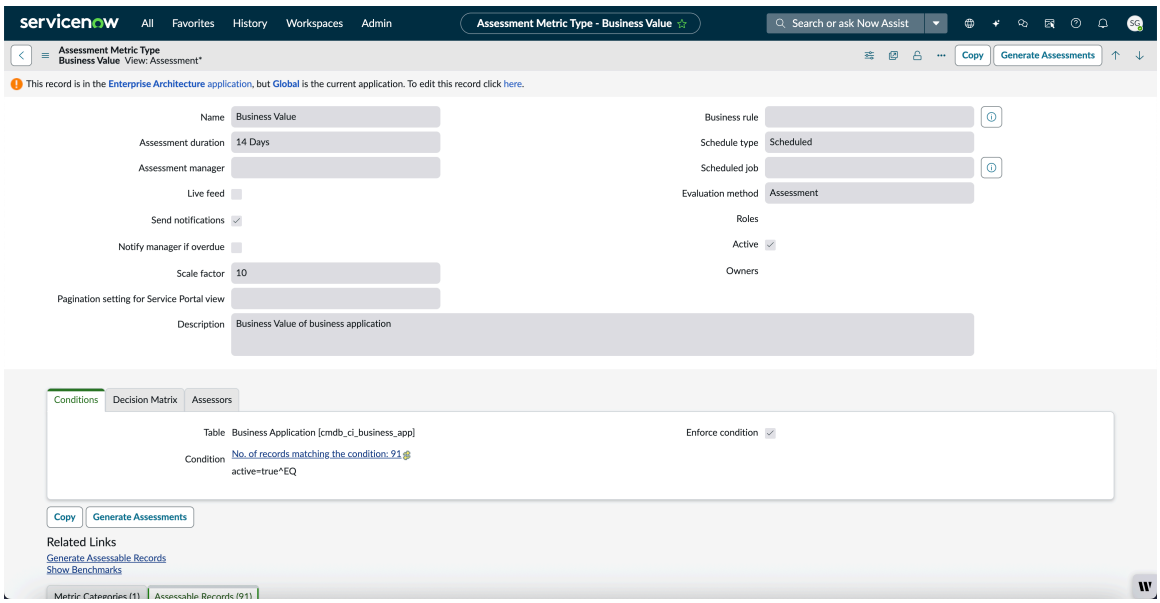
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Note: Only indicators registered in the Application Bubble Chart [apm_bubble_chart] table appear as axis options on the bubble chart. Adding an indicator to a scoring profile alone is not sufficient. For details on how to add X and Y axis indicators, see Add or edit an application indicator.

Step 4: Stakeholders complete assessments

The EA team sends out assessment surveys. Stakeholders rate each application on Business Value and Technical Risk. After all responses are collected, the platform aggregates them per application into the following raw scores (application weights):



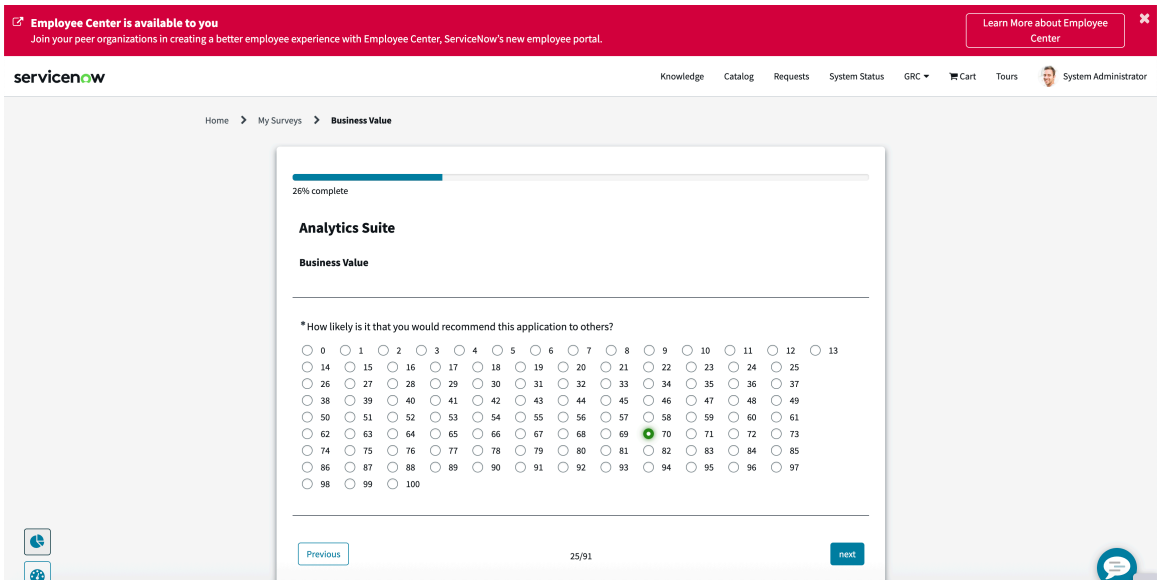
Raw assessment scores (application weights)

Application	Business Value (raw)	Technical Risk (raw)
App A — CRM Platform	85	20
App B — Legacy ERP	30	90
App C — Analytics Suite	70	40

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Raw assessment scores (application weights) (continued)

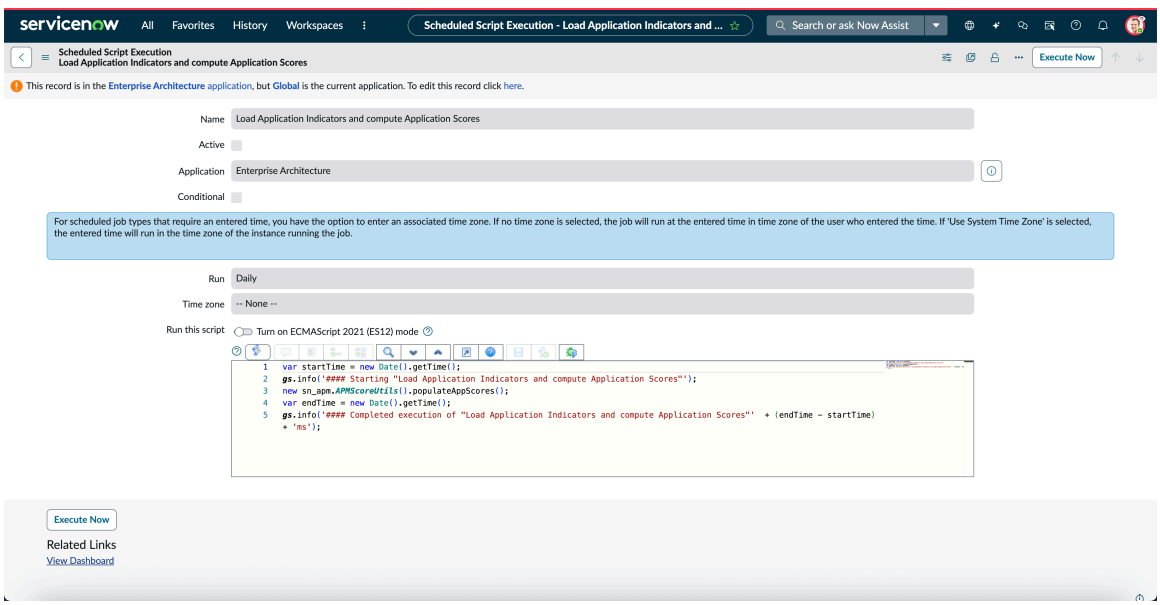
Application	Business Value (raw)	Technical Risk (raw)
App D — HR Portal	55	60
App E — Internal Wiki	20	75



Note: Raw scores here are assessment aggregate values on a 0–100 scale. These are the application weights — the inputs to normalization. They are not directly plotted on the bubble chart.

Step 5: The scoring job runs and calculates normalized values

The admin runs the **Load Application Indicators and compute Application Scores** scheduled job. The system calculates a Normalized Value for each application per indicator, scaling all values to a 1–10 range relative to each other.



Verifying that the job ran successfully

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- **System log**: Navigate to syslog.list, filter Message contains Load Application Indicators, Created = Last 30 minutes. A successful run shows two entries: #### Starting... and #### Completed execution of... <elapsed>ms. A missing completion entry means the job failed mid-run — add Level = Error to the filter to find the cause.
- **Indicator scores**: Navigate to apm_app_indicator_score.list, filter by Fiscal period = <FY26: Q2> and Configuration Item = any business application (from this use case). Both Business Value and Technical Risk rows must appear with a non-zero Normalized value. If rows are missing, check that all assessment instances were Complete or Canceled before regeneration ran.
- **Progress Worker path**: If you used sn_apm_regenerate_application_scores.do instead of the scheduled job, search syslog for APM: Regenerate application scores on <date> — this is the log marker for the background worker path.

Normalization formula:

This scales raw scores, so all applications are comparable on a 1–10 range regardless of absolute values. The lowest-scoring application always maps to 1.0 and the highest to 10.0, with all others distributed proportionally between.

```
Normalized Value = (((appWeight - minWeight) / (maxWeight -
 minWeight)) x 9) + 1
```

For indicators with Minimize direction, the normalized value is then inverted so that a lower raw value (better condition) results in a higher chart position:

```
Adjusted Normalized Value = (10 - Normalized Value) + 1
```

Business Value — normalized values (direction: Maximize)

Min = 20 (App E) · Max = 85 (App A) · Range = 65.

Business Value — normalization calculation

Application	Raw score	Calculation	Normalized Value
App A — CRM Platform	85	(((85-20)/65)x9)+1	10.00
App B — Legacy ERP	30	(((30-20)/65)x9)+1	2.38
App C — Analytics Suite	70	(((70-20)/65)x9)+1	7.92
App D — HR Portal	55	(((55-20)/65)x9)+1	5.85
App E — Internal Wiki	20	(((20-20)/65)x9)+1	1.00

Technical Risk — normalized values (direction: Minimize, inverted)

Min = 20 (App A) · Max = 90 (App B) · Range = 70.

Technical Risk — normalization and inversion calculation

Application	Raw score	Step 1: Normalize	Step 2: Invert	Final Normalized Value
App A — CRM Platform	20	1.00	(10-1.00)+1	10.00
App B — Legacy ERP	90	10.00	(10-10.00)+1	1.00
App C — Analytics Suite	40	3.57	(10-3.57)+1	7.43

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Technical Risk — normalization and inversion calculation (continued)

Application	Raw score	Step 1: Normalize	Step 2: Invert	Final Normalized Value
App D — HR Portal	60	6.43	(10-6.43)+1	4.57
App E — Internal Wiki	75	8.57	(10-8.57)+1	2.43

Tip: App B has the highest raw Technical Risk score (90), meaning it is the riskiest application. After inversion, it receives a normalized value of 1.00 — the lowest possible — placing it at the bottom of the Y-axis on the bubble chart. This makes the visual intuitive: riskier applications appear lower.

Step 6: Indicator scores and overall application scores are calculated

The system calculates each application's indicator score — the normalized value weighted by the indicator's share of the scoring profile — and sums them into an overall application score.

Indicator Score formula:

```
Indicator Score = Normalized Value x (Indicator Weight / Total
 Weights)
```

In this example, the weight share for each indicator is 50 / (50 + 50) = 0.5.

Indicator scores and overall application scores

Application	BV normalized	BV indicator score	TR normalized	TR indicator score	Overall score
App A — CRM Platform	10.00	5.00	10.00	5.00	10.00
App C — Analytics Suite	7.92	3.96	7.43	3.72	7.68
App D — HR Portal	5.85	2.93	4.57	2.29	5.22
App E — Internal Wiki	1.00	0.50	2.43	1.22	1.72
App B — Legacy ERP	2.38	1.19	1.00	0.50	1.69

These values are stored across two separate tables:

- **Indicator Score** [apm_app_indicator_score] — holds the per-indicator, per-application, per-fiscal-period score records. The Normalized Value in this table is what the X and Y axes on the bubble chart read directly.
- **Overall Application Score** [apm_app_score] — holds the aggregate score per application per fiscal period, calculated by summing all Indicator Scores. This is visible in the **List** view of Application Rationalization and is used as the Bubble Size when the **Overall Score** option is selected in the chart settings.

Note: The X and Y axis positions on the bubble chart are read from Indicator Score [apm_app_indicator_score] table. The overall score only affects bubble size.

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Verify the business application default filter

Before a scored business application can appear on the bubble chart, verify the business application default filter. This filter is an encoded query stored in the *sn_apm_ws.business_application_default_filter* system property.

The default value is:

```
install_status!=2@install_status!=2000@life_cycle_stage!=End of
 Life@life_cycle_stage!=EMPTY
```

This means the chart excludes any business application that is in Retired or Decommissioned install status, or whose lifecycle stage is End of Life or empty. In this scenario, all five Acme Corp applications have an active install status and a current lifecycle stage. All five pass the filter and are eligible to appear as bubbles.

Important: If your organization has customized this property — for example, by adding a company scope filter such as company.sys_id=YOURCOMPANYID — any scored application that does not match the custom filter will be silently excluded from the chart, even if it has valid indicator scores for both axes. This is one of the most common causes of missing bubbles. To verify, apply the encoded query on the Business Applications [cmdb_ci_business_app.list] table and confirm your scored applications appear in the results.

The data pipeline

The bubble chart rendering depends on the following data chain. Verify that the following components are aligned for the chart to render data.

Link	Component	What it does	Where to check
1	Scoring profile property	Determines which scoring profile the bubble chart queries against.	System Property: *sn_apm_ws.app_indicator_scoring_p*
2	Profile indicator configuration	Maps indicators to the scoring profile with weights and configuration.	Table: Profile indicator [apm_application_profile_indicator]
3	Bubble chart configuration	Maps specific indicators to the X, Y, and Z (bubble size) axes of the chart.	Table: Application Bubble Chart [apm_bubble_chart]
4	Indicator score data	Actual score records for business applications, per indicator, per fiscal period.	Table: Indicator Score [apm_app_indicator_score]
5	Business application default filter	Controls which business applications are visible in application rationalization.	System Property: *sn_apm_ws.business_application_de*

Step 7: Reading the bubble chart

Before interpreting the chart, check the following details.

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Pre-flight checklist — things to verify before reading the chart

#	What to check	What good looks like
1	Correct scoring profile configured? [*sn_apm_ws.app_indicator_scoring_profile*]	Contains the sys_id of the profile under which indicator scores were created. If blank, the system uses the Default Application Profile. Only one sys_id is accepted — comma-separated values are not supported.
2	Indicators mapped to that profile? [apm_application_profile_indicator]	At least two indicators (for the X and Y axes) are listed in the Profile Indicators related list with non-zero weights.
3	Bubble chart configuration set up? [apm_bubble_chart]	An active record exists whose X and Y Indicator fields reference indicators that are also listed in the scoring profile from check 2.
4	Indicator scores exist for the selected fiscal period? [apm_app_indicator_score]	Records exist for business applications, for the fiscal period selected in the chart UI, under the same scoring profile. Both X and Y axis indicators must have scores — a bubble only renders if both axes have data for the same fiscal period.
5	Scored apps pass the default filter? (*sn_apm_ws.business_application_score_default_filter*)	The business applications with indicator scores are included by the encoded query. Verify by applying the filter on `cmdb_ci_business_app.list` and confirming the scored apps appear.

Role required: sn_apm.apm_analyst.

The EA architect navigates to **Workspaces** > **Enterprise Architecture Workspace**, opens the Application Rationalization page by selecting the application rationalization icon (), and then selects **Bubble chart**.

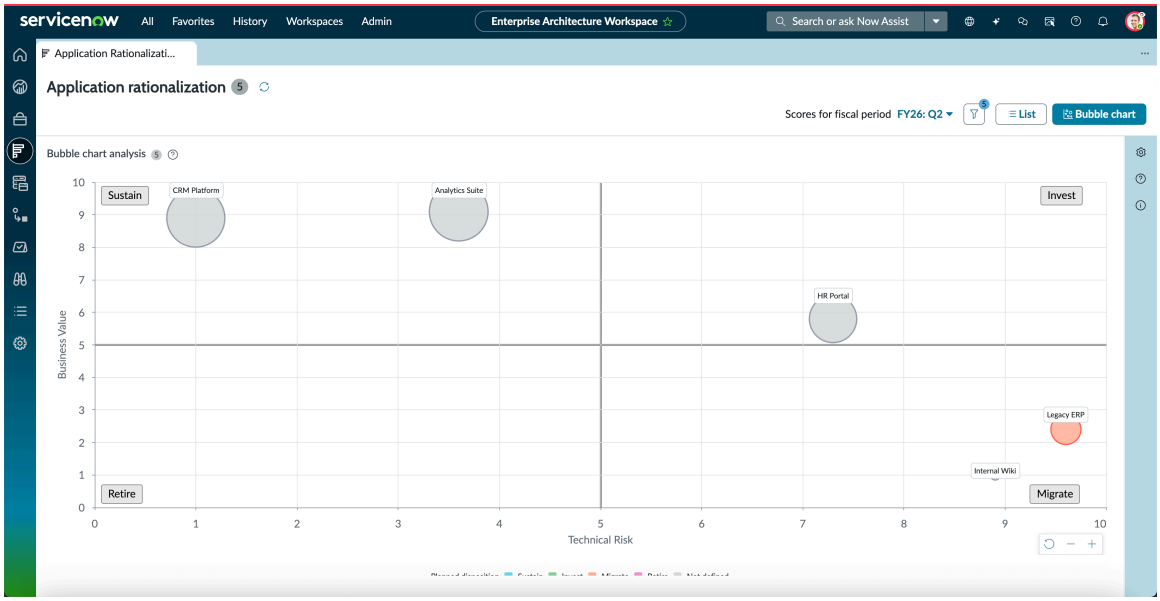
The architect selects the settings icon () to configure the chart and selects **Apply**:

- **X-axis:** Technical Risk
- **Y-axis:** Business Value
- **Bubble size:** Overall Application Score
- **Bubble labels:** Toggle enabled, to display business application names on the chart.

Note: The bubble chart plots the **Normalized Value** (1–10 scale) on each axis — not the raw assessment score and not the weighted indicator score. The axis scale is fixed at 0–10. For a bubble to appear on the chart, indicator scores for the selected fiscal period must be available for both the X-axis and Y-axis indicators.

After selecting **Apply**, business application bubbles are displayed on the chart. Each application appears at the intersection of its normalized values for the two chosen indicators:

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Bubble chart — application positions and quadrant assignments

Application	X (TR norm)	Y (BV norm)	Quadrant	Implication
App A — CRM Platform	1.00	10.00	Sustain	High value, low risk — maintain and monitor
App C — Analytics Suite	3.57	7.92	Sustain	Strong value, manageable risk — keep steady
App D — HR Portal	6.14	5.85	Invest	Moderate value, elevated risk — invest to reduce risk
App E — Internal Wiki	8.17	1.00	Migrate	Low value, high risk — migrate or replace
App B — Legacy ERP	10.00	2.38	Migrate	Low value, very high risk — urgent action needed

Note: Business application bubbles whose X and Y axis values are within the value range of +/-0.25 of each other are grouped. A grouped bubble displays the total number of business application bubbles it contains. On selecting a grouped bubble, the info pane appears, displaying the list of individual business applications that are part of the grouped bubble.

Note: The bubble chart displays up to 500 bubbles by default. If you have more than 500 assessed business applications, configure the *sn_apm_ws.appRationalizationMaximumBubbles* system property to increase this limit. For details, see Change the number of bubbles displayed on the bubble chart.

You can also generate insights into business applications using Now Assist. For information, see Generate insights into business applications.

Step 8: Taking action from the bubble chart

The architect identifies App B (Legacy ERP) in the Migrate quadrant. Its Business Value normalized score (2.38) and Technical Risk normalized score (1.00) indicate low value and very high risk, making it a priority for retirement. The architect takes the following actions directly from the bubble chart.

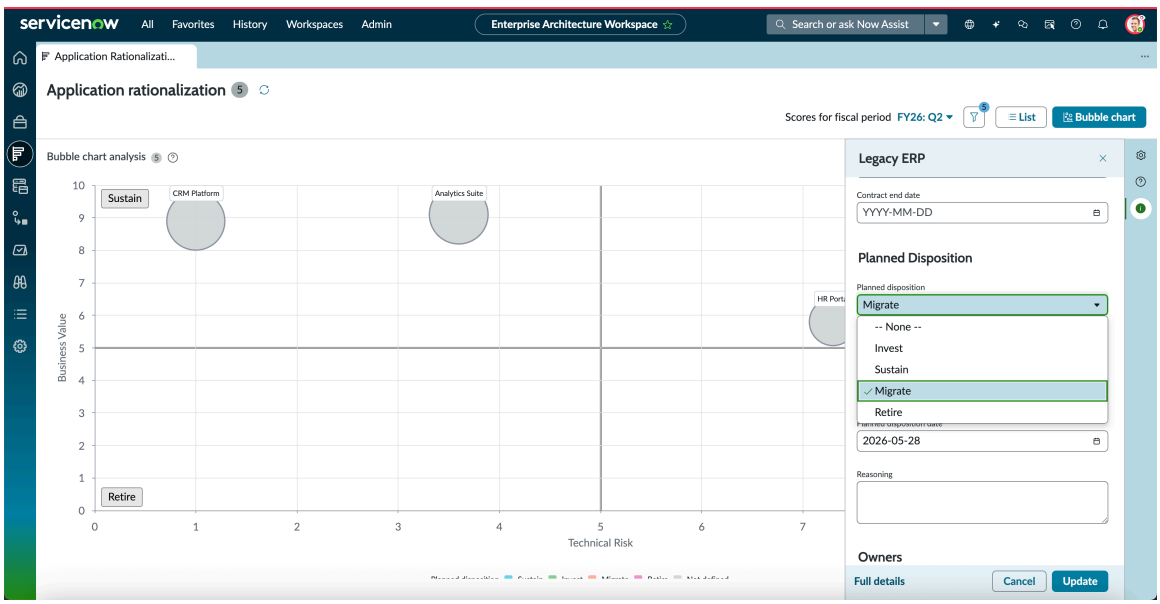
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Set planned disposition

The architect selects the bubble for App B and performs the following, depending on the bubble type:

Set planned disposition actions by bubble type

Bubble type	Action
Single bubble	1. Select the bubble for App B. 2. In the pop-up window, select the context menu icon (⋮) and select **Set planned disposition**. 3. In the Set planned disposition window, select **Migrate** from the **Planned disposition** list, enter a **Planned disposition date**, and add the justification in the **Reasoning** field. 4. Select **Update**.
Grouped bubble	1. Select the grouped bubble. The info pane appears, displaying the list of individual business applications within the group. 2. Select the context menu icon (⋮) next to App B and select **Set planned disposition**. 3. In the Set planned disposition window, select **Migrate** from the **Planned disposition** list, enter a **Planned disposition date**, and add the justification in the **Reasoning** field. 4. Select **Update**.



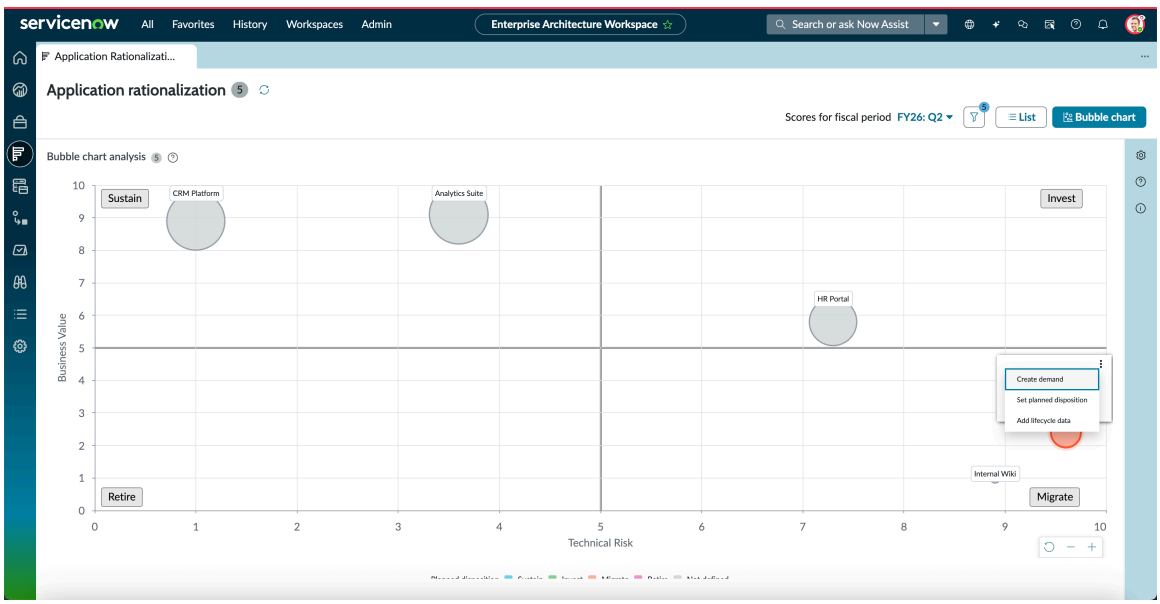
Create a demand

The architect also creates a demand for the retirement initiative directly from the bubble chart:

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Create demand actions by bubble type

Bubble type	Action
Single bubble	**1.** Select the bubble for App B. **2.** In the pop-up window, select the context menu icon (⋮) and select **Create demand**. **3.** On the Create demand form, fill in the fields and select **Create**. For a description of the field values, see Create demand form.
Grouped bubble	**1.** Select the grouped bubble. The info pane appears. **2.** Select the context menu icon (⋮) next to App B and select **Create demand**. **3.** On the Create demand form, fill in the fields and select **Create**. For a description of the field values, see Create demand form.



The architect also notes that App E (Internal Wiki) sits in the Migrate quadrant but has a slightly higher Technical Risk normalized value (2.43) compared to App B. Before setting a disposition, the architect selects the App E bubble to open the side panel. The architect then selects **Full details** to review the full business application record without leaving the bubble chart. For more details, see Edit business application details in bubble chart view.

Summary: the full flow at a glance

The following sequence summarizes how a raw assessment score is set to a bubble position on the chart:

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1. **Stakeholder assessments** produce a raw score per application (the application weight).
2. **The scoring job** normalizes raw scores to a 1–10 scale relative to all other applications in the set (Normalized Value). For Minimize-direction indicators, the value is inverted so that a lower raw score results in a higher chart position.
3. **Weights are applied** to each normalized value (Normalized Value x weight share = Indicator Score).
4. **Indicator Scores are summed** to produce the Overall Application Score.
5. **Scores are stored** in two tables: Indicator Scores [apm_app_indicator_score] table (per-indicator scores — drives axis positions) and Overall Application Score [apm_app_score] table (overall aggregate score — drives bubble size when Overall Score is selected).
6. **The default application filter** (*sn_apm_ws.business_application_default_filter*) is applied. Only applications that pass this encoded query filter are eligible to appear as bubbles.
7. **The bubble chart plots the Normalized Value** on the X and Y axes. The axis scale is fixed at 0–10. Bubble color reflects the planned disposition value set for each application.

Key behaviors this example illustrates

Position is relative, not absolute. An application's bubble position depends on how it compares to all other applications in the evaluated set — not on its raw score alone. If you add or remove applications from the portfolio, the normalized values recalculate and bubbles shift.

The chart plots normalized values. Even though the scoring profile uses weighted indicator scores to calculate the overall application score, the X and Y axes show the normalized value (1–10). Changing indicator weights does not move bubbles left or right — it only changes the overall score, which controls bubble size when configured that way.

Minimize-direction indicators are inverted on the chart. Technical Risk is set to Minimize. Because Technical Risk is on the X-axis, a riskier application appears further right. The Invest quadrant (top-right) represents applications with high business value but elevated technical risk — applications worth investing in to reduce that risk.

Fiscal period alignment is critical. If the indicators are set to Quarter frequency and the fiscal period filter on the chart is set to a month, no data appears. The period filter must match the indicator frequency.

Bubble size adds a third dimension. Configuring an indicator or the overall score as the Bubble Size lets you compare a third metric visually without adding another axis. For example, using Portfolio TCO as the bubble size shows cost alongside value and risk.

Closely scored applications are grouped. Bubbles whose X and Y axis values are within +/-0.25 of each other are combined into a single grouped bubble showing a count. Select a grouped bubble to open the info pane and see the individual applications inside.

Related topics

- Use bubble chart view
- Analyze applications using the bubble chart
- Create a demand using the bubble chart
- Set the planned disposition of a business application
- Add business application lifecycle data using bubble chart

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Edit business application details in bubble chart view

Change the number of bubbles displayed on the bubble chart

Use list view

Manage demands, business applications, add lifecycle data, planned disposition and modify associated demands and project details for business applications.

Note: You can zoom on this page to 200% or 400% through your browser settings without the loss of content or functionality. Page layouts are transformed into a vertical, stacked view automatically.

Create a demand using the list view

Create a demand for an application from the list view.

Before you begin

Role required: sn_apm.apm_analyst

About this task

Use a demand as a step to identify cost-saving opportunities on the business applications and meet your targets. The strategy that you associate with the demand action decides the strategy for the application.

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Application Rationalization page by selecting the application rationalization icon ( ).
3. Select the row context menu icon (⋮) next to the business application that you want to create a demand for and select **Create demand**.
4. On the Create demand form, fill in the fields.
   For a description of the field values, see Create demand form.
5. Select **Create**.
   The new demand is displayed under the business application.

Related topics

Edit a demand associated with a business application

Set the planned disposition of a business application

Set the planned disposition of a business application to track future decisions on the application.

Before you begin

Role required: sn_apm.apm_analyst

About this task

Setting the planned disposition of a business application results in better data maintenance, improved data findability, and better management of application maintenance costs.

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Application Rationalization page by selecting the application rationalization icon ( ).

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3. Select the row context menu icon (⋮) next to the business application that you want to set the planned disposition status for and select **Set planned disposition**.
4. In the Set planned disposition window, do the following:
   a. Select the planned disposition status from the Planned disposition drop-down list.
   b. Select a target date for the planned disposition. The target date must be the current date or a future date.
   c. Enter the justification for selecting that planned disposition status in the **Reasoning** field.
5. Select **Update**.

Related topics

Edit business application details in list view

Add business application lifecycle data using the list view

Add business application lifecycle data using the list view

Create or edit the life cycle of a business application to better manage the business application.

Before you begin

The application model (field name: Model ID) is required to create application model life cycle for a business application. The application model ID can either be entered manually or can be automatically created and added to the business application by executing or scheduling the *`CSDM Product Model Assignment`* script. For details on how to run the *`CSDM Product Model Assignment`* script, see Auto-generate product models for logical CIs.

Role required: sn_apm.apm_analyst

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Application Rationalization page by selecting the application rationalization icon ( ).
3. Select **List**.
4. Select the row context menu icon (⋮) next to the business application that you want to add business application lifecycle data for and select **Add lifecycle data**.
5. On the Application model lifecycle details form, fill in the fields.
   For a description of the field values, see Application model life-cycle details form.
6. Select **Create**.

Related topics

Edit business application details in list view

Generate insights into business applications

Edit business application details in list view

You can make updates to the business application record directly from the list, without leaving the list view.

Before you begin

Role required: sn_apm.apm_analyst

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Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Application Rationalization page by selecting the application rationalization icon ().
3. Select the business application that you want to edit details for.

   The side panel appears and the business application details are displayed.

   Note:
   - Select **Full details** to view more details about the business application.
   - You can also generate insights into a business application using Now Assist, by selecting the **Generate Insights** button available in the **Insights** tab on the side panel. For more details, see Generate insights into business applications.

4. On the Business application form, fill in the fields.

   For a description of the field values, see Business application form.

5. Select **Update**.

Related topics

Set the planned disposition of a business application

Add business application lifecycle data using the list view

Generate insights into business applications

Edit a demand associated with a business application

Use application rationalization to edit existing demands associated with business applications.

Before you begin

You can make updates to the demand record directly from the list without leaving the list view.

Role required: sn_apm.apm_analyst

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Application Rationalization page by selecting the application rationalization icon ().
3. Select the expand row icon () next to the business application that you want to edit the associated demand details for.
   A list of demands associated with that business application is displayed.
4. Select the demand that you want to edit.
   A new pane appears on the List view screen and the details of the demand are displayed.

   Note: Select **Full details** to view more details regarding the demand.

5. On the Edit demand form, fill in the fields.
   For a description of the field values, see Demand form.
6. Select **Update**.

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Related topics

Edit a project associated with a business application

Edit a project associated with a business application

Use application rationalization to edit existing projects associated with business applications.

Before you begin

You can make updates to the demand record directly from the list without leaving the list view.

Role required: sn_apm.apm_analyst

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Application Rationalization page by selecting the application rationalization icon ().
3. Select the expand row icon () next to the business application that you want to edit the associated project details for.
   A list of projects associated with that business application is displayed.
4. Select the project that you want to edit.
   A new pane appears on the List view screen and the details of the project are displayed.

   Note: Select **Full details** to view more details about the project.

5. On the Edit a project form, fill in the fields.
   For a description of the field values, see Edit a project form.
6. Select **Update**.

Related topics

Edit a demand associated with a business application

Export application rationalization data to Excel or CSV

Export the application rationalization list view data to Microsoft Excel or CSV to obtain insights, share with stakeholders, and prepare for analysis.

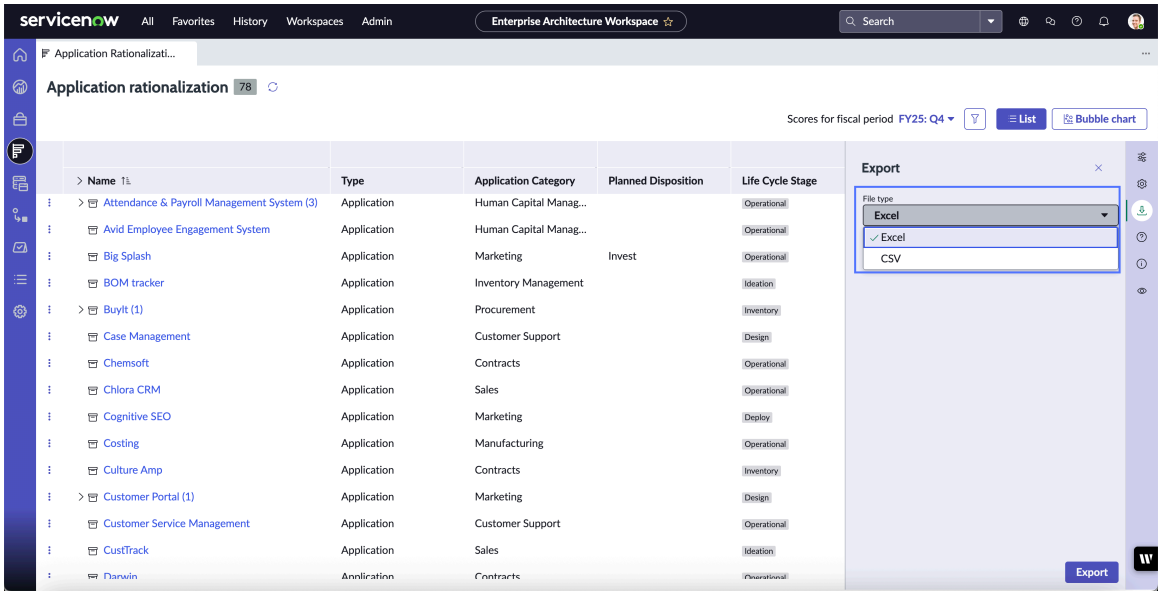
Before you begin

Role required: sn_apm.apm_user

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Application Rationalization page by selecting the application rationalization icon ().
3. Select the export icon () on the Application Rationalization page.
4. From the File type drop-down on the Export window, select **Excel** or **CSV** to export the data to a Microsoft Excel or CSV file respectively.

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5. Select **Export**.

Result

A file with the selected format is downloaded and saved in your local system.

Apply filters on the Application Rationalization page

You can apply filters on the Application Rationalization page in the Enterprise Architecture Workspace. Based on the applied filters, the bubble chart and list view are updated so that you can view data for a specific business application. Your filter preferences are saved and applied the next time you visit the page.

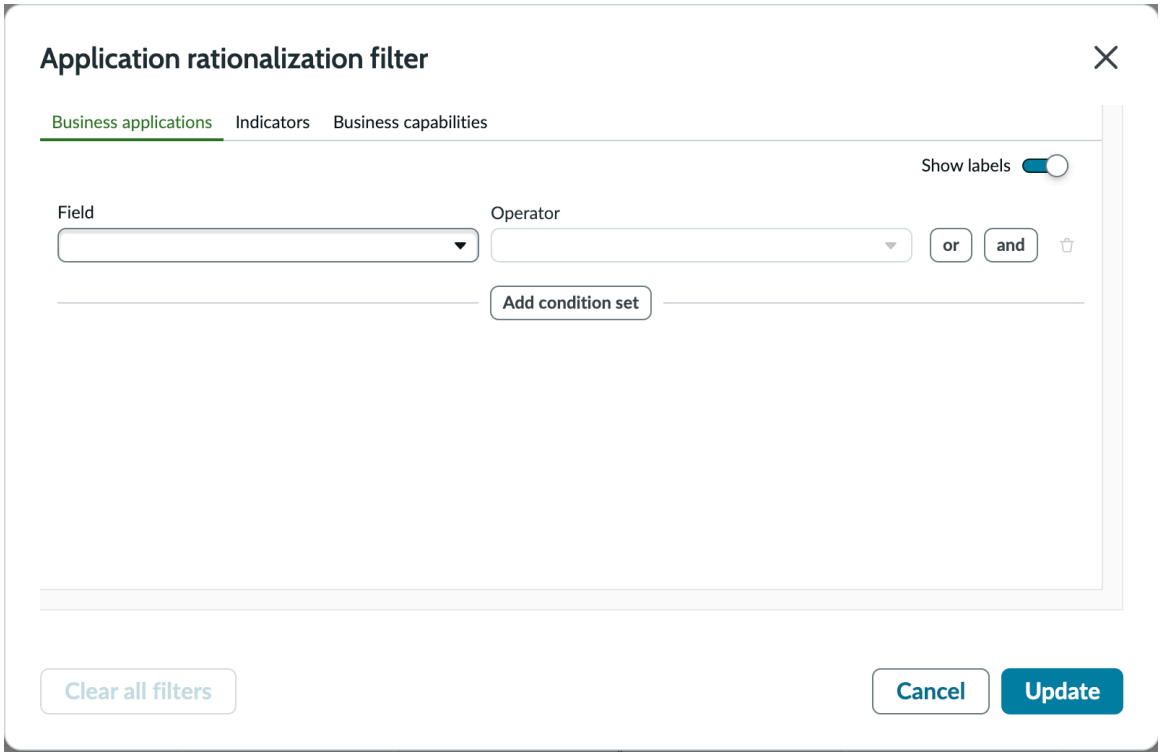
Before you begin

Role required: sn_apm.apm_read

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Application Rationalization page by selecting the application rationalization icon ( ).
3. On the Bubble chart or List view page, select the Application rationalization filter icon ( ). The Application rationalization filter pop-up window appears.

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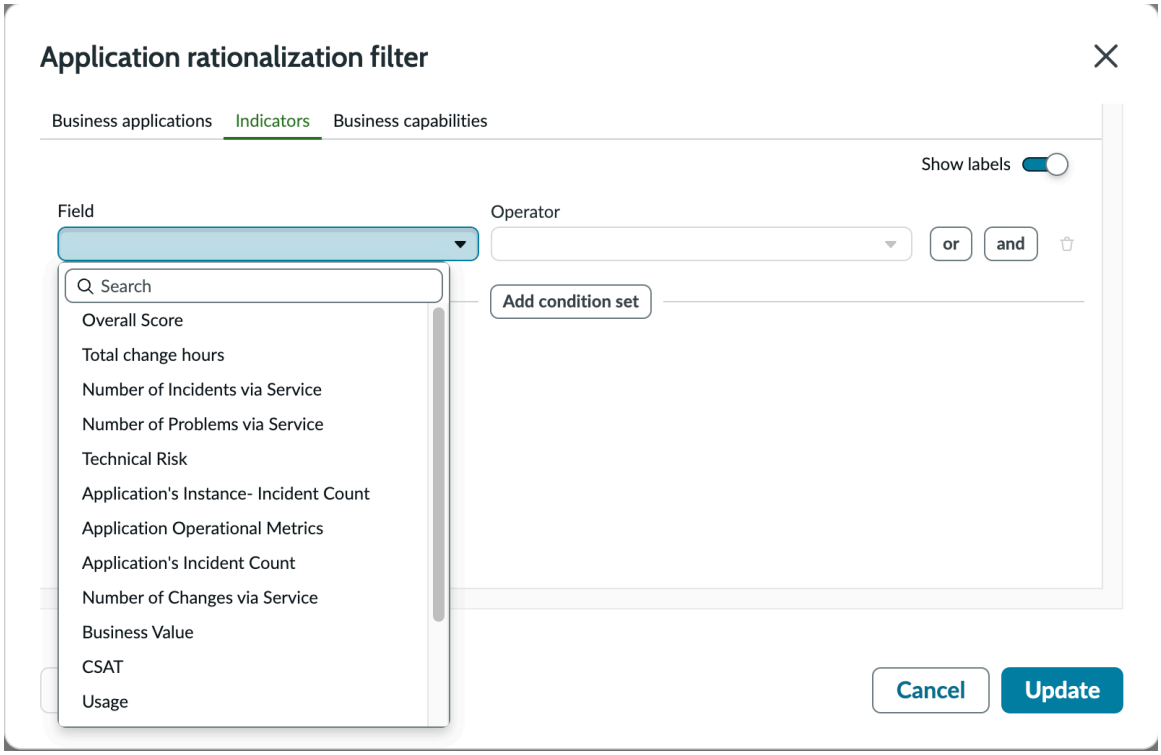


4. To filter business applications based on specific data, select any of the following tabs:
   - **Business applications**
   - **Indicators**
   - **Business capabilities**

   You can add filters on all the three tabs simultaneously.
5. Add conditions to filter the business applications.

   You can add multiple conditions.

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6. Select **Update**.
   The bubble chart and the list view pages are updated based on your applied filters. Also, an indicator is displayed on top of the filter icon to show the number of filters applied.

Note:

- You can also clear all applied filters by selecting the **Clear all filters** button.
- The List view page displays all business applications, whereas the Bubble chart page displays only assessed applications. As a result, filter results may differ between the two pages.
- When you apply a business capability-based filter, business applications associated with the selected capability and also its child capabilities are displayed.

Related topics

Rationalization of business applications

Working with application rationalization

Working with Technology Lifecycle Management (TLM) in EA Workspace

Technology Lifecycle Management provide visibility, governance, and actionable insights into the technologies used across the enterprise.

You can zoom on this page to 200% or 400% through your browser settings without the loss of content or functionality. Page layouts are transformed into a vertical, stacked view automatically.

Filter software results using an encoded query in TLM

Filter out unwanted software products and reduce the number of results to skip unwanted software and their lifecycles to be shown in the **Lifecycle Timeline** view of a business application. By default, the TPM picks licensable software. Use this encoded query when you want TPM to include other software (non-licensable) and filter the result.

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Before you begin
Role required: admin

About this task

Important:

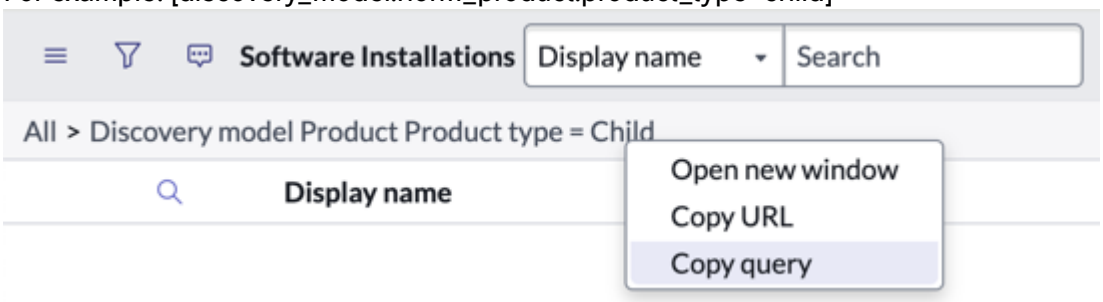
Technology Lifecycle Management (TLM) was previously known as Technology Portfolio Management (TPM). TPM and TLM refer to the same feature. Table names and scheduled job names continue to use TPM and haven't been renamed.

Whether your instance displays TPM or TLM also depends on your application versions. TLM labels appear only when both the Enterprise Architecture Workspace application (version 9.2.1 or later) and the Technology Lifecycle Management plugin, sn_apm_tpm (version 1.11.0 or later), are installed. If either application is on an earlier version, the interface continues to show TPM.

The TPM can track technology lifecycles for both licensable and non-licensable software. When you import non-licensable software, you may end up importing a large number of unnecessary software. You can restrict the number of results by specifying an encoded query as the value of the **sn_apm_tpm.softwareDiscoveryModelProductFilterForTPM** system property. When you set a value for this system property and run the TPM scheduled job, you can see the search results that satisfy your encoded query.

Procedure

1. Generate an encoded query string through a filter on the **Software Installations** page.
   a. Navigate to the **Software Installations** [cmdb_sam_sw_install] page.
   b. Apply a filter as per your requirement.
   c. Select **Run**.
   d. Right-click at the end of the filter breadcrumb and select **Copy query** from the context menu. For example: [discovery_model.norm_product.product_type=child]



2. Navigate to the System Property [sys_properties] table list view.
   a. Select **All**.
   b. In the navigation filter, enter `sys_properties.list` and press Enter.
3. Open the record for the **sn_apm_tpm.softwareDiscoveryModelProductFilterForTPM** system property.
4. Set the system property's value to an encoded query.
   For example: [discovery_model.norm_product.product_type=child]. If the system prompts you to change the application scope so that you can edit the record, select the provided link.

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5. Select **Update**.
6. Run the scheduled job *Populate TPM Discovered Technologies and Lifecycles*.
   a. Navigate to **All** > **#System Definition** > **#Scheduled Jobs**.
   b. Find and open the# scheduled job*Populate TPM Discovered Technologies and Lifecycles*.
   c. Select#**#Execute Now**.

Result
The technologies and lifecycle values are updated in the TPM Discovered Technologies [sn_apm_tpm_discovered_technology_list] table.

Related topics
- Update TPM data for a business application or application service
- Restart the TPM Discovered Technologies and Lifecycles job
- View technology lifecycle details
- View TPM risk details
- Update the system property to gather software products from a CMDB table
- View technology portfolio audit risk details
- Update verification status of TPM audit details
- View TPM logs

Update TPM data for a business application or application service

Manually update the Technology Lifecycle Management (TLM) lifecycle data for software and hardware models in your business applications and application services.

Before you begin
Role required: sn_apm.apm_user

About this task
Important:

Technology Lifecycle Management (TLM) was previously known as Technology Portfolio Management (TPM). TPM and TLM refer to the same feature. Table names and scheduled job names continue to use TPM and haven't been renamed.

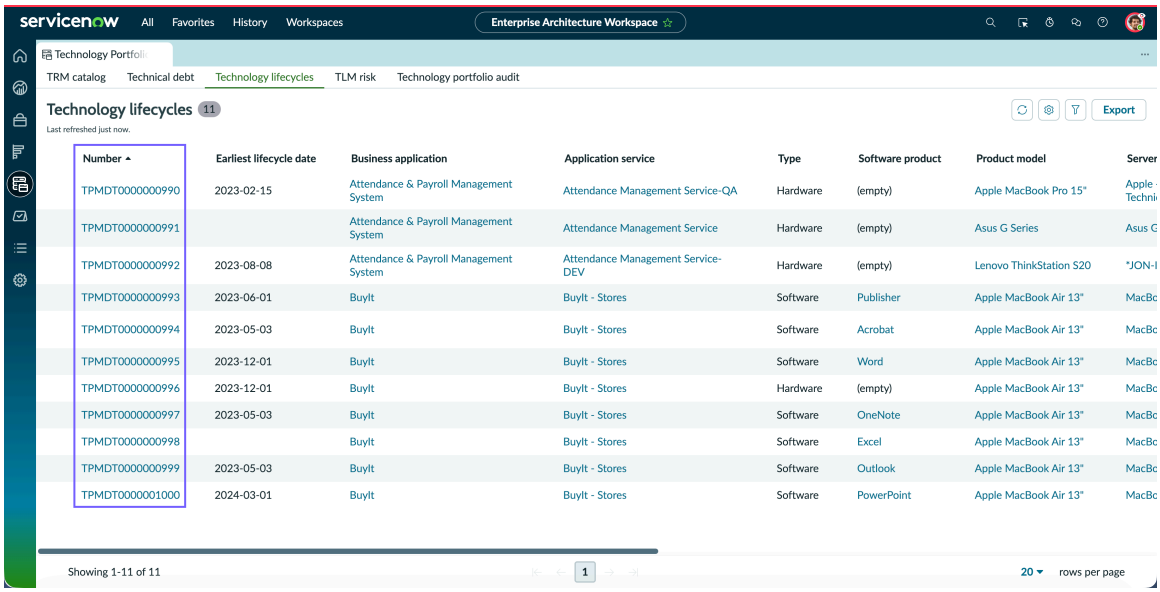
Whether your instance displays TPM or TLM also depends on your application versions. TLM labels appear only when both the Enterprise Architecture Workspace application (version 9.2.1 or later) and the Technology Lifecycle Management plugin, sn_apm_tpm (version 1.11.0 or later), are installed. If either application is on an earlier version, the interface continues to show TPM.

You can refresh the TLM lifecycle data manually for a selected business application or application service. A scheduled job *Populate TPM Discovered Technologies and Lifecycles* is also run on schedule or on-demand to update the lifecycle data for all business applications and application services.

Note: The data for software products is displayed only when the Software Asset Management (SAM) Foundation or Software Asset Management (SAM) Professional plugin is installed.

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TLM lifecycle record identifiers are automatically generated on creating a TLM record using the Technology Lifecycle Management (sn_apm_tpm) plugin version 1.9.0. However, for TLM lifecycle records generated using previous versions of the TLM plugin don't have any lifecycle record identifiers. The TLM record identifiers of these TLM lifecycle records must be generated using the Populate Number field in TPM Discovered Technologies job. For information, see Run a scheduled job to populate Technology Lifecycle Management lifecycle record identifier.



On selecting a TLM lifecycle record identifier, more information on the TLM lifecycle record is displayed.

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Portfolio List view by selecting the portfolio icon ( ).
3. Expand Application Portfolio and select **Business Applications**.
4. Select the relevant business application.
5. Select the three-dot menu ( ) and select **Update TPM Data**.

Result

An on-demand job starts to update the TPM data.

Related topics

Restart the TPM Discovered Technologies and Lifecycles job

Scheduled jobs for TLM in the EA Workspace

Restart the TPM Discovered Technologies and Lifecycles job

You can restart the *TPM Discovered Technologies and Lifecycles* job if it encounters any interruptions or failures.

Before you begin

Role required: admin

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About this task

Important:

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Whether your instance displays TPM or TLM also depends on your application versions. TLM labels appear only when both the Enterprise Architecture Workspace application (version 9.2.1 or later) and the Technology Lifecycle Management plugin, sn_apm_tpm (version 1.11.0 or later), are installed. If either application is on an earlier version, the interface continues to show TPM.

The restart feature enables you to resume the *TPM Discovered Technologies and Lifecycles* job from where it stopped. This ensures that the data population process is completed without having to start the job from the beginning.

The **Restart** button is set to active on the **TPM Discovered Technology Run Log** page after one hour from the time since when there's no update to the run log. You can determine whether the job faced any interruption or whether it failed by analyzing the **Records Processed** field value. If the count of TLM discovered technologies in the system stops increasing while the job is running, the job may have stalled or failed.

Procedure

1. Navigate to **Workspaces** > *Enterprise Architecture Workspace*.
2. Open the Setup page by selecting the Setup icon  .
3. Select the expand row icon () next to **Logs**.
4. Select the relevant TLM log that you want to restart the *TPM Discovered Technologies and Lifecycles* job for.
5. Select **Restart**.

Related topics

Exploring Technology Lifecycle Management (TLM) in Enterprise Architecture Workspace

Update TPM data for a business application or application service

View TPM logs

Scheduled jobs for TLM in the EA Workspace

View technology lifecycle details

View Technology Lifecycle Management (TLM) lifecycle timelines in Enterprise Architecture Workspace to track product's lifecycle phases.

Before you begin

The lifecycle data for software products is displayed only when the Basic Software Asset Management or Software Asset Management Professional plugin is installed.

Role required: sn_apm.apm_user

About this task

The TLM lifecycle data enables you to manage your technology portfolio effectively, ensuring your business applications and their related application services are updated or replaced timely.

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Note: For each TLM lifecycle phase, the end date of one phase is the start date of the next phase. For information on lifecycle end-date calculation logic, see View TPM and TRM lifecycle timelines on the Gantt chart.

Each software technology lifecycle record also shows which TRM product and product lifecycle govern its obsolescence status. For field details, see Governing TRM product fields.

Procedure

1. Navigate to **Workspaces** > *Enterprise Architecture Workspace*.
2. Open the Technology Portfolio page by selecting the Technology Portfolio icon .
3. Select **Technology lifecycles**.

Related topics

- Update TPM data for a business application or application service
- View technology portfolio audit risk details
- Filter software results using an encoded query in TLM
- Update the system property to gather software products from a CMDB table
- Update verification status of TPM audit details
- Restart the TPM Discovered Technologies and Lifecycles job
- View TPM logs
- View TPM risk details
- Governing TRM product fields

View TPM risk details

View all the Technology Lifecycle Management (TLM) risk data for software products that are facing high and moderate technology risks.

Before you begin

Role required: sn_apm.apm_user

About this task

Important:

Technology Lifecycle Management (TLM) was previously known as Technology Portfolio Management (TPM). TPM and TLM refer to the same feature. Table names and scheduled job names continue to use TPM and haven't been renamed.

Whether your instance displays TPM or TLM also depends on your application versions. TLM labels appear only when both the Enterprise Architecture Workspace application (version 9.2.1 or later) and the Technology Lifecycle Management plugin, sn_apm_tpm (version 1.11.0 or later), are installed. If either application is on an earlier version, the interface continues to show TPM.

You can use the TLM risk scores to manage and mitigate the risks associated with your software products and hardware models.

The TLM risk details of software products and hardware models are calculated based on their lifecycle dates. These dates include end of support, end of extended support, and end of life. The sum of the related software and hardware risk score is the risk score of an application service. The sum of the related application service risk score is the risk score of a business application.

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Procedure

1. Navigate to **Workspaces** > *Enterprise Architecture Workspace*.
2. Open the Technology Portfolio page by selecting the Technology Portfolio icon  .
3. Select **TPM risk**.

   To update the TPM risk scores, you must run the *Populate Technology Lifecycles Risks* job. For more details, see Schedule a job to generate TPM technology risk.

Related topics

Update TPM data for a business application or application service

Restart the TPM Discovered Technologies and Lifecycles job

Update the system property to gather software products from a CMDB table

View technology portfolio audit risk details

Update verification status of TPM audit details

View TPM logs

Update the system property to gather software products from a CMDB table

You can optionally customize the default values of the *sn_apm_tpm.configurationItemsWithSoftwareInstalls* system property, to capture the details of Technology Lifecycle Management (TLM) software products that aren't stored in the default CMDB tables, Computer (CMDB_CI_Computer) and all similar instances of the table, Docker Container (CMDB_CI_Docker_Container), and Serverless Hardwares (CMDB_CI_Serverless_Hardware).

Before you begin

This feature is available from Technology Lifecycle Management plugin (sn_apm_tpm) version 1.6.0.

Role required: admin

About this task

Important:

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Whether your instance displays TPM or TLM also depends on your application versions. TLM labels appear only when both the Enterprise Architecture Workspace application (version 9.2.1 or later) and the Technology Lifecycle Management plugin, sn_apm_tpm (version 1.11.0 or later), are installed. If either application is on an earlier version, the interface continues to show TPM.

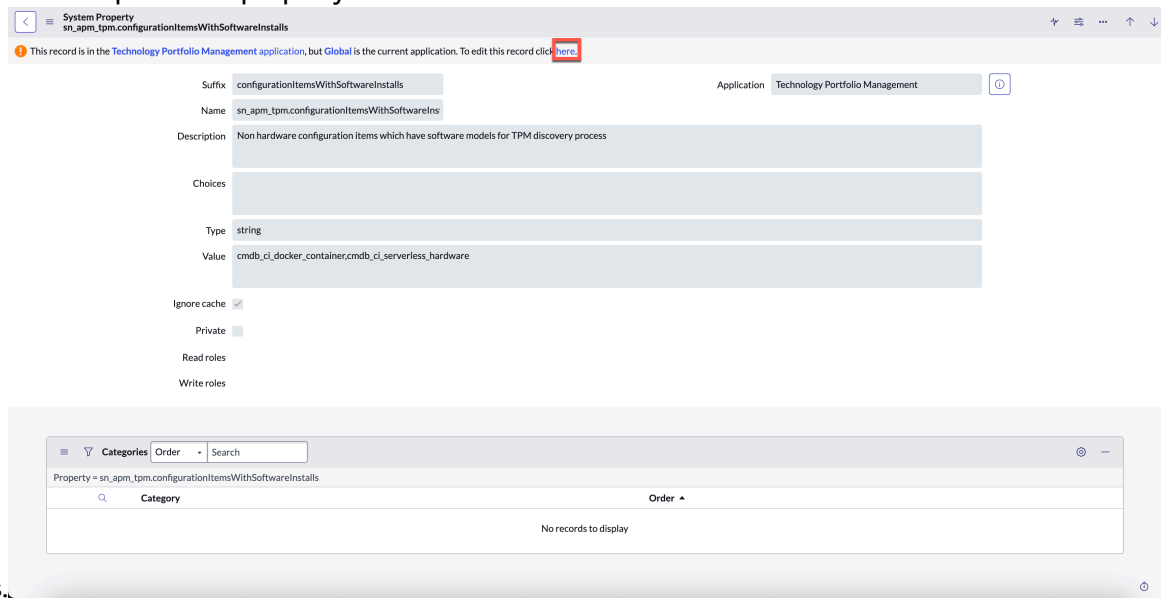
You can include other CMDB tables that contain software products, to fetch and view TLM software products data from those tables.

Procedure

1. Select **All** and in the navigation filter enter *sys_properties.list*.
2. Navigate to the *sn_apm_tpm.configurationItemsWithSoftwareInstalls* system property.

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3. Select **here** to update the property



details.

4. In the **Value** field, add the CMDB table name that contains the details of the TLM software products, in comma-delimited format.
5. Select **Update**.
   After the *`Populate TPM Discovered Technologies and Lifecycles`* job runs, the corresponding software records and their technology lifecycle details are populated in the list of TLM software products.

Related topics

Exploring Technology Lifecycle Management (TLM) in Enterprise Architecture Workspace

Update TPM data for a business application or application service

Restart the TPM Discovered Technologies and Lifecycles job

View technology portfolio audit risk details

You can view all your technology portfolio details in the Enterprise Architecture Workspace.

Before you begin

Role required: admin

Procedure

1. Navigate to **Workspace** > *`Enterprise Architecture Workspace`*.
2. Open the Technology Portfolio page by selecting the Technology Portfolio icon .
3. Select **Technology portfolio audit**.
   For a description of field values, see Technology portfolio audit form.

Update verification status of TPM audit details

Change the verification status of a software product or hardware model lifecycle in the TPM technology lifecycle exception table.

Before you begin

Role required: sn_apm.apm_analyst

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About this task

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Whether your instance displays TPM or TLM also depends on your application versions. TLM labels appear only when both the Enterprise Architecture Workspace application (version 9.2.1 or later) and the Technology Lifecycle Management plugin, sn_apm_tpm (version 1.11.0 or later), are installed. If either application is on an earlier version, the interface continues to show TPM.

You can acknowledge a heuristic lifecycle match of a product by changing its status to verified or rejected.

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Technology Portfolio page by selecting the Technology Portfolio icon  .
3. Select **Technology Portfolio Audit** tab.
4. Open a product type (Software or Hardware) by selecting it.
5. In the TPM Technology Lifecycle Exception form, set the **Verification Status** to either **Verified** or **Rejected**.
   If the lifecycle phase is set to **Verified**, then the exception count is reduced in the Technology Lifecycle table. If the lifecycle phase is set to **Rejected**, then the exception count is reduced and dates for that lifecycle phase will not appear in the Technology Lifecycle table.
6. **Optional:** Add comments in the **Comments** box.
7. Select **Save**.

Related topics

View technology portfolio audit risk details

View TPM logs

Track the progress of Technology Lifecycle Management (TLM) analysis by examining the TPM Discovered Technology Run Logs [sn_apm_tpm_discovered_technology_run_log] table. Each time the analysis is run, an entry is added to this table.

Before you begin

Role required: sn_apm.apm_user

Important:

Technology Lifecycle Management (TLM) was previously known as Technology Portfolio Management (TPM). TPM and TLM refer to the same feature. Table names and scheduled job names continue to use TPM and haven't been renamed.

Whether your instance displays TPM or TLM also depends on your application versions. TLM labels appear only when both the Enterprise Architecture Workspace application (version 9.2.1 or later) and the Technology Lifecycle Management plugin, sn_apm_tpm (version 1.11.0 or later), are installed. If either application is on an earlier version, the interface continues to show TPM.

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Procedure

1. Navigate to **Workspaces** > *Enterprise Architecture Workspace*.
2. Open the Setup page by selecting the Setup icon  .
3. Select the expand row icon ( ) next to **Logs**.
4. Select **TPM Logs**.

Related topics

- Exploring Technology Lifecycle Management (TLM) in Enterprise Architecture Workspace
- Restart the TPM Discovered Technologies and Lifecycles job
- Update TPM data for a business application or application service
- View technology lifecycle details
- View TPM risk details
- Update the system property to gather software products from a CMDB table
- View technology portfolio audit risk details
- Update verification status of TPM audit details

Run a scheduled job to populate Technology Lifecycle Management lifecycle record identifier

Run the Populate Number field in TPM Discovered Technologies job to populate missing Technology Lifecycle Management (TLM) lifecycle record identifiers.

Before you begin

Ensure the Technology Lifecycle Management (sn_apm_tpm) plugin version 1.9.0. is installed and activated.

Role required: admin

About this task

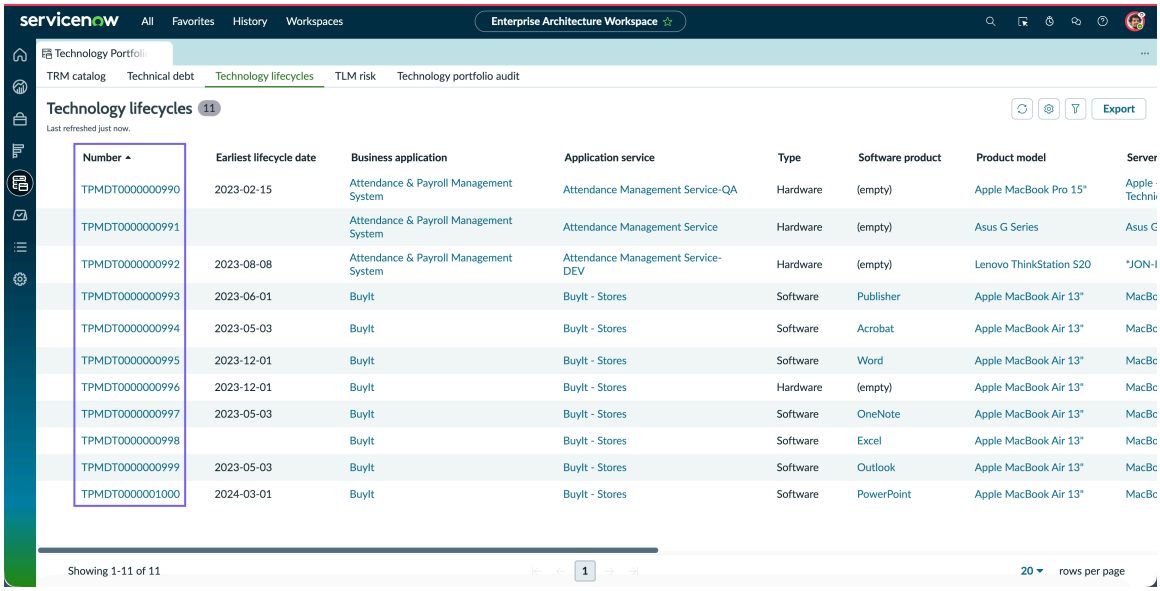
Important:

Technology Lifecycle Management (TLM) was previously known as Technology Portfolio Management (TPM). TPM and TLM refer to the same feature. Table names and scheduled job names continue to use TPM and haven't been renamed.

Whether your instance displays TPM or TLM also depends on your application versions. TLM labels appear only when both the Enterprise Architecture Workspace application (version 9.2.1 or later) and the Technology Lifecycle Management plugin, sn_apm_tpm (version 1.11.0 or later), are installed. If either application is on an earlier version, the interface continues to show TPM.

TLM lifecycle record identifiers are automatically generated on creating a TLM record using the Technology Lifecycle Management (sn_apm_tpm) plugin version 1.9.0. However, for TLM lifecycle records generated using previous versions of the TLM plugin don't have any lifecycle record identifiers. The TLM record identifiers of these TLM lifecycle records must be generated using the Populate Number field in TPM Discovered Technologies job.

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On selecting a TLM lifecycle record identifier, more information on the TLM lifecycle record is displayed.

Procedure

1. Navigate to **All** > **#System Definition** > **#Scheduled Jobs**.
2. Find and open the# scheduled job*`Populate Number field in TPM Discovered Technologies`*.
3. Select**#Execute Now**.

> **Note:** You must verify that your application scope is set to Technology Lifecycle Management. For information on how to change the application scope, see Application picker

Result

The missing TLM lifecycle record identifiers are generated for the older TLM lifecycle records.

Related topics

Activate the Technology Lifecycle Management (TLM) plugin

Exploring Technology Lifecycle Management (TLM) in Enterprise Architecture Workspace

Update TPM data for a business application or application service

Run a scheduled job to generate TPM lifecycle data

Run a scheduled job to fetch the technology lifecycle data for your technology portfolio.

Before you begin

Role required: admin

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About this task

Important:

Technology Lifecycle Management (TLM) was previously known as Technology Portfolio Management (TPM). TPM and TLM refer to the same feature. Table names and scheduled job names continue to use TPM and haven't been renamed.

Whether your instance displays TPM or TLM also depends on your application versions. TLM labels appear only when both the Enterprise Architecture Workspace application (version 9.2.1 or later) and the Technology Lifecycle Management plugin, sn_apm_tpm (version 1.11.0 or later), are installed. If either application is on an earlier version, the interface continues to show TPM.

The scheduled job *Populate TPM Discovered Technologies and Lifecycles* is created to fetch the technology lifecycle data for your technology portfolio. This job can be run on-demand to calculate the technology lifecycle risk. The scheduled job executes the script generating the lifecycle risk dates for your software and hardware models. These dates include end of support date, end of extended support date, and end of life date.

Note: The data for software products is displayed only the Software Asset Management (SAM) Foundation or Software Asset Management (SAM) Professional plugin is installed.

Procedure

1. Navigate to **All** > **#System Definition** > **#Scheduled Jobs**.
2. Find and open the# scheduled job*Populate TPM Discovered Technologies and Lifecycles*.
3. Select#**#Execute Now**.

Result

After executing the scheduled job, the engine automatically stores the technologies and lifecycle values in the TPM Technology Lifecycle [sn_apm_tpm_technology_lifecycle] table. It updates the values in the table each time after you run the job.

What to do next

To know the status of the scheduled job, refer to the TPM Discovered Technology Run Logs [sn_apm_tpm_discovered_technology_run_log] table. To view the technology lifecycle information, refer to the TPM Technology Lifecycle [sn_apm_tpm_technology_lifecycle] table. You can view the results in the Portfolio > Technology Portfolio Management > Logs page.

Related topics

Technology lifecycle risk score in Enterprise Architecture Workspace

Schedule a job to generate TPM technology risk

Execute the#*Populate Technology Lifecycle Risks* scheduled job to generate the TPM technology lifecycle risks and populate the result in the TPM Technology Lifecycle Risks [sn_apm_tpm_technology_risk] table.

Before you begin

Role required: admin

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About this task

Important:

Technology Lifecycle Management (TLM) was previously known as Technology Portfolio Management (TPM). TPM and TLM refer to the same feature. Table names and scheduled job names continue to use TPM and haven't been renamed.

Whether your instance displays TPM or TLM also depends on your application versions. TLM labels appear only when both the Enterprise Architecture Workspace application (version 9.2.1 or later) and the Technology Lifecycle Management plugin, sn_apm_tpm (version 1.11.0 or later), are installed. If either application is on an earlier version, the interface continues to show TPM.

The scheduled job populates the risk scores for business applications (BA), application services (AS), software products, and hardware models. The scores are calculated for a fiscal period of type month in the Technology lifecycle risks (sn_apm_tpm_technology_risk) table.

The scores of software products and hardware models are calculated based on their lifecycle dates (EOS, EOES, EOL), where 100 is the maximum score. The sum of the related software and hardware risk score is the risk score of an application service. And, the sum of the related application service risk score is considered as the risk score of a business application.

These risk scores are displayed in the risk column of a TPM Gantt chart. The same scores for a business application is served as an application weight for calculating Technology Lifecycle Risk indicator score for a fiscal period.

Procedure

1. Navigate to **All** > **System Scheduler** > **#Scheduled Jobs** > **#Scheduled Jobs**.
2. Find and select the#*Populate Technology Lifecycle Risks* scheduled job.
3. Select#**Execute Now**.

Working with Technology Reference Model (TRM) in EA Workspace

The Technology Reference Model provides a structured, centralized view of all technology products; hardware, software, and platforms used across the enterprise.

You can zoom on this page to 200% or 400% through your browser settings without the loss of content or functionality. Page layouts are transformed into a vertical, stacked view automatically.

Related topics

Technology Reference Model in Enterprise Architecture Workspace

View all TRM phases

You can view the list of all Technology Reference Model (TRM) phases in the Enterprise Architecture Workspace.

Before you begin

Role required: sn_apm.apm_user

Procedure

1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Setup page by selecting the Setup icon  .

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3. Select the expand row icon ( ) next to *TRM* **Phases**.
4. Select **All**.

Related topics

- Manage TRM phases
- View all TRM categories
- View all TRM products grouped by product category
- View all TRM products
- Request a TRM product in Enterprise Architecture Workspace
- Request a TRM product lifecycle in Enterprise Architecture Workspace
- Create a TRM product in Enterprise Architecture Workspace
- Associate an Architectural Artifact to a TRM product
- Create TRM product lifecycles in Enterprise Architecture Workspace
- View Technology Reference Model technical debts
- Update TRM technical debt data using scheduled job
- Add or edit a TRM phase

View all TRM categories

You can view the list of all Technology Reference Model (TRM) categories in the Enterprise Architecture Workspace.

Before you begin

Role required: sn_apm.apm_user

Procedure

1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Setup page by selecting the Setup icon .
3. Select the expand row icon ( ) next to *TRM* **Categories**.
4. Select **All**.

Related topics

- Manage TRM categories
- Add or edit a TRM category
- View Technology Reference Model technical debts
- View all TRM phases
- Create a TRM product in Enterprise Architecture Workspace
- View all TRM products
- Update TRM technical debt data using scheduled job
- Request a TRM product in Enterprise Architecture Workspace
- View all TRM products grouped by product category
- Request a TRM product lifecycle in Enterprise Architecture Workspace

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Associate an Architectural Artifact to a TRM product

Create TRM product lifecycles in Enterprise Architecture Workspace

View all TRM products grouped by product category

You can view all your Technology Reference Model (TRM) products, grouped by category, in the Enterprise Architecture Workspace.

Before you begin

You can add or hide the displayed columns as per your requirement by selecting the Personalize icon ( ).

Role required: sn_apm.apm_user

Procedure

1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Technology Portfolio page by selecting the Technology Portfolio icon .
3. In the **TRM catalog** tab, select the expand row icon ( ) next to the TRM product category that you want to view the TRM products for.
   A list of TRM products is displayed.

Related topics

View Technology Reference Model technical debts

View all TRM phases

Create a TRM product in Enterprise Architecture Workspace

View all TRM categories

View all TRM products

Update TRM technical debt data using scheduled job

Request a TRM product in Enterprise Architecture Workspace

Request a TRM product lifecycle in Enterprise Architecture Workspace

Associate an Architectural Artifact to a TRM product

Create TRM product lifecycles in Enterprise Architecture Workspace

View all TRM products

You can view all available Technology Reference Model (TRM) products in the Enterprise Architecture Workspace.

Before you begin

You can add or hide the displayed columns as per your requirement by selecting the **List Actions** icon ( ) and then selecting **Edit columns**.

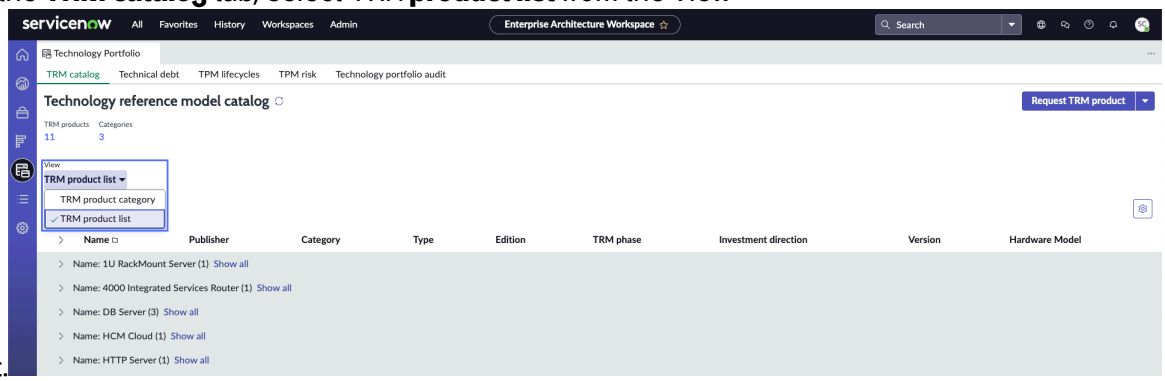
Role required: sn_apm.apm_user

Procedure

1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Technology Portfolio page by selecting the Technology Portfolio icon .

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3. In the **TRM catalog** tab, select *TRM* **product list** from the View list.



4. Select the expand row icon ( ) next to the TRM product to view more details.

Related topics

- View Technology Reference Model technical debts
- View all TRM phases
- Create a TRM product in Enterprise Architecture Workspace
- View all TRM categories
- Update TRM technical debt data using scheduled job
- Request a TRM product in Enterprise Architecture Workspace
- View all TRM products grouped by product category
- Request a TRM product lifecycle in Enterprise Architecture Workspace
- Associate an Architectural Artifact to a TRM product
- Create TRM product lifecycles in Enterprise Architecture Workspace

Request a TRM product in Enterprise Architecture Workspace

Submit a request to add a software or hardware product to the TRM library and optionally include one or more lifecycle records with the request.

Before you begin

Role required: sn_apm.apm_user

Procedure

1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Technology Portfolio page by selecting the Technology Portfolio icon .
3. In the **TRM catalog** tab, select **Request** *TRM* **product**.
4. On the **Details** tab, fill in the fields.

   For a description of the field values, see Request TRM product form.

5. **Optional:** Include lifecycle records with the request by selecting the **TRM product lifecycles** tab, then select **Create lifecycle**.

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Note:

- For software products: You can add up to 5 version and edition combinations, with a maximum of 10 phases per combination.
- For hardware products: You can add up to 5 hardware models, with a maximum of 10 phases per hardware model.

a. For a software product, enter the **Version**, **Edition**, **TRM phase**, **Phase start date**, and **Phase end date**.

b. For a hardware product, select the **Hardware model**, then fill in the **TRM phase**, **Phase start date**, and **Phase end date**.
The **Model number** and **Barcode** fields are populated automatically when you select a hardware model.

c. To add more phases to the same version or hardware model, select the add TRM lifecycle phase icon +.

d. To add another version and edition group or hardware model group, select **Add version and edition** for software product or select **Add model** for hardware model.

6. Select **Submit**.

Result

A confirmation message appears with the request number, for example: `Request for TRM product is created successfully: TRMPREQ0000000`. Select the request number to track the status of the request. The request is routed to an Enterprise Architect for approval.

Related topics

View Technology Reference Model technical debts

View all TRM phases

Create a TRM product in Enterprise Architecture Workspace

View all TRM categories

View all TRM products

Update TRM technical debt data using scheduled job

View all TRM products grouped by product category

Request a TRM product lifecycle in Enterprise Architecture Workspace

Associate an Architectural Artifact to a TRM product

Create TRM product lifecycles in Enterprise Architecture Workspace

Run a job to sync TRM product names in EA Workspace

Approve or reject TRM requests

Request a TRM product lifecycle in Enterprise Architecture Workspace

Submit a request to add one or more lifecycle records to an existing TRM product.

Before you begin

Role required: sn_apm.apm_user

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Procedure

1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Technology Portfolio page by selecting the Technology Portfolio icon ( ).
3. In the **TRM catalog** tab, select the more actions icon next to **Request** *TRM* **product**, then select **Request** *TRM* **product lifecycles**.
4. In the **TRM product** field, select the existing product to add lifecycles to.
5. In the **TRM product lifecycles** section, select **Add version and edition** for a software product or **Add model** for a hardware product, then fill in the lifecycle fields.

   Note:

   - For software products: You can add up to 5 version and edition combinations, with a maximum of 10 phases per combination.
   - For hardware products: You can add up to 5 hardware models, with a maximum of 10 phases per hardware model.

   a. For a software product, enter the **Version**, **Edition**, **TRM phase**, **Phase start date**, and **Phase end date**.

   b. For a hardware product, select the **Hardware model**, then fill in the **TRM phase**, **Phase start date**, and the **Phase end date**.
   The **Model number** and **Barcode** fields are populated automatically when you select a hardware model.

   c. To add more phases to the same version or hardware model, select the add TRM lifecycle phase icon (+).

   d. To add another version and edition group or hardware model group, select **Add version and edition** for software product or select **Add model** for hardware model.

   For a description of the field values, see Request TRM product lifecycle form.

6. Select **Submit**.

Result

A confirmation message appears with the request number. The request is routed to an Enterprise Architect for approval. After approval, the lifecycle records are created and linked to the selected product.

Related topics

View Technology Reference Model technical debts

View all TRM phases

Create a TRM product in Enterprise Architecture Workspace

View all TRM categories

View all TRM products

Update TRM technical debt data using scheduled job

Request a TRM product in Enterprise Architecture Workspace

View all TRM products grouped by product category

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- Associate an Architectural Artifact to a TRM product
- Create TRM product lifecycles in Enterprise Architecture Workspace
- Request TRM product lifecycle form
- Approve or reject TRM requests

Request a TRM product from the service catalog

Submit a request from the service catalog to add a software or hardware product to the TRM library. Optionally, include one or more lifecycle records with the request.

Before you begin

Role required: sn_apm.apm_user

Procedure

1. Navigate to **All** > **Service Portal Home** > **Request Something** > **Technology Reference Model Management**.
2. Select **Request TRM Product**.
3. Fill in the fields on the form.

   For field information, see Request TRM Product form the Service Catalog form.
4. **Optional:** In the **TRM product lifecycles** section, select **Add** to include lifecycle records with the request.

   a. In the **Add Row** dialog, fill in the lifecycle fields.

      (Optional) For field information, see Request TRM Product Lifecycle form.

   b. Select **Add** to save the lifecycle row.
5. Select **Submit**.

Result

A confirmation message appears with the request number, for example: `Request for TRM product is created successfully:` TRMPREQ0000000. Select the request number to view the request details and the associated lifecycle records.

Related topics

- Request TRM Product form the Service Catalog form
- Request a TRM product lifecycle from the service catalog
- Request a TRM product in Enterprise Architecture Workspace
- Approve or reject TRM requests

Request a TRM product lifecycle from the service catalog

Submit a request from the service catalog to add one or more lifecycle records to an existing TRM product.

Before you begin

Role required: sn_apm.apm_user

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Procedure

1. Navigate to **All** > **Service Portal Home** > **Request Something** > **Technology Reference Model Management**.
2. Select **Request TRM Product Lifecycle**.
3. Fill in the fields on the form.

   For field information, see Request TRM Product Lifecycle form.
4. In the **TRM product lifecycles** section, select **Add** to add lifecycle records.

   a. In the **Add Row** dialog, fill in the lifecycle fields.

      For field information, see Request TRM Product Lifecycle form.

   b. Select **Add** to save the lifecycle row.
5. Select **Submit**.

Result

A confirmation message appears with the request number, for example: `Request for TRM product lifecycle is created successfully: TRMPLCREQ0000000`. Select the request number to view the request details and the associated lifecycle records.

Related topics

Request TRM Product Lifecycle form

Request a TRM product from the service catalog

Request a TRM product lifecycle in Enterprise Architecture Workspace

Approve or reject TRM requests

View or update your TRM requests

View all your product requests, product lifecycle requests, track their statuses, and edit your existing requests. You can also manage the approvers for your request

Before you begin

Role required: sn_apm.apm_user

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. In the Needs Attention section, select the **My Requests** tab.
   You can see the list of requests of requests that are raised by you.
3. Select a product request number to open it.
4. Update the details and select **Save**.

Related topics

Approve or reject TRM requests

Technology Reference Model in Enterprise Architecture Workspace

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Approve or reject TRM requests

As an Enterprise Architect, approve or reject a TRM product or product lifecycle requests submitted by other users.

Before you begin

The user must be part of the Enterprise Architect Group.

Role required: sn_apm.apm_analyst

About this task

When an Enterprise Architecture user submits a TRM product request or a TRM product lifecycle request, the Enterprise Architect group receives an email notification.

A TRM product request can include one or more associated lifecycle requests. The product request record displays the requested lifecycles in the **Requested Lifecycles** tab and any existing lifecycles for the same product in the **Existing Lifecycles** tab.

A standalone TRM product lifecycle request can include multiple child lifecycle records submitted in a single bulk request. The parent lifecycle request record shows all child lifecycle records in the **Requested Lifecycles** tab. Approving or rejecting the parent request determines the outcome for all associated child lifecycle records.

Notification recipients are determined by the requester, which is resolved differently depending on the request type:

TRM product requests

The Requestor is the user set in the **Owner** field of the **Request** *TRM* **product** form. Notifications for the request are sent to this user. If the **Owner** field is left empty, the logged-in user is treated as the Requestor by default, and notifications are sent to them.

TRM product lifecycle requests

The Requestor is always the logged-in user. Lifecycle-related notifications are therefore sent to that user.

Procedure

1. Navigate to **Workspaces** > *Enterprise Architecture Workspace*.
2. In the Needs Attention section, select the **My Approvals** tab.
3. Select a request number to open it.
   The Approvals list includes both TRM product requests (TRMPREQ) and TRM product lifecycle requests (TRMLCREQ).
4. Review the request details and the associated lifecycle records.
   - Select the **Requested Lifecycles** tab to view the lifecycle records included in this request. Each lifecycle record shows the version, edition (for software products) or hardware model (for hardware products), requested TRM phase, and phase start and end dates.
   - Select the **Existing Lifecycles** tab to view any lifecycles already on the product to help you identify potential conflicts before approving.
5. Select **Approve** or **Reject**.
   Edit the request details such as **Requested TRM phase**, **Category**, and **Business Justification** before approving, if needed. Select **Update** to save edits without triggering an approval decision.

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Result

- When a TRM product request is approved, the TRM product and all associated lifecycle records are created in the system simultaneously. The requester receives an email notification.
- When a standalone TRM product lifecycle request is approved, all child lifecycle records in the request are created and linked to the parent product. The requester receives an email notification.
- When a request is rejected, no product or lifecycle records are created. The requester receives an email notification.

Related topics

View or update your TRM requests

Technology Reference Model in Enterprise Architecture Workspace

Request a TRM product in Enterprise Architecture Workspace

Request a TRM product lifecycle in Enterprise Architecture Workspace

Request a TRM product from the service catalog

Request a TRM product lifecycle from the service catalog

Create a TRM product in Enterprise Architecture Workspace

Create a TRM product and optionally add one or more product lifecycles in a single operation.

Before you begin

You must be part of the Enterprise Architect Group.

Role required: sn_apm.apm_analyst

Procedure

1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Technology Portfolio page by selecting the Technology Portfolio icon  .
3. Select the more actions icon  next to **Request** *TRM* **product**, then select **Create** *TRM* **product**.
4. On the **Details** form, fill in the fields.

   For a description of the field values, see Request TRM product form.

5. Include lifecycle records, by selecting the **TRM product lifecycles** tab, then select **Create Lifecycle**.

   Note:

   - For software products: You can add up to 5 version and edition combinations, with a maximum of 10 phases per combination.
   - For hardware products: You can add up to 5 hardware models, with a maximum of 10 phases per hardware model.

   a. For a software product, enter the **Version**, **Edition**, **TRM phase**, **Phase start date**, and **Phase end date**.

   b. For a hardware product, select the **Hardware model**, then fill in the **TRM phase**, **Phase start date**, and the **Phase end date**.

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The **Model number** and **Barcode** fields are populated automatically, when you select a hardware model.

c. To add more phases to the same version or hardware model, select the Add icon.

d. To add another version and edition group or hardware model group, select **Add version and edition** for software product or select **Add model** for hardware model.

For a description of the field values, see Create TRM product lifecycle form.

6. Select **Create**.

Result

A confirmation message appears with the request number, for example: `TRM product and lifecycles are created.` The new *TRM* product and all associated lifecycle records are visible in the Technology reference model catalog.

Related topics

View Technology Reference Model technical debts

View all TRM phases

View all TRM categories

View all TRM products

Update TRM technical debt data using scheduled job

Request a TRM product in Enterprise Architecture Workspace

View all TRM products grouped by product category

Request a TRM product lifecycle in Enterprise Architecture Workspace

Associate an Architectural Artifact to a TRM product

Create TRM product lifecycles in Enterprise Architecture Workspace

Create TRM product lifecycle form

Create TRM product lifecycles in Enterprise Architecture Workspace

Add one or more lifecycle records to an existing TRM product.

Before you begin

You must be part of the Enterprise Architect Group.

Role required: sn_apm.apm_analyst

Procedure

1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Technology Portfolio page by selecting the Technology Portfolio icon ( ).
3. Select the more actions icon ( ) next to **Request** *TRM* **product**, then select **Create** *TRM* **product lifecycles**.
4. In the **TRM product** field, select the product to add lifecycles to.
5. In the **TRM product lifecycles** section, add lifecycle records.

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Note:

- For software products: You can add up to 5 version and edition combinations, with a maximum of 10 phases per combination.
- For hardware products: You can add up to 5 hardware models, with a maximum of 10 phases per hardware model.

a. For a software product, enter the **Version** and **Edition**, then fill in the **TRM phase**, **Phase start date**, and optionally the **Phase end date** for the first phase row.

b. For a hardware product, select the **Hardware model**, then fill in the **TRM phase**, **Phase start date**, and optionally the **Phase end date**.

c. To add more phases to the same version or hardware model, select the add TRM lifecycle phase icon (+).

d. To add another version and edition group or hardware model group, select **Add version and edition**.

See Create TRM product lifecycle form

6. Select **Create**.

Result

A confirmation message appears with the request number. The new lifecycle records are visible under the product in the Technology reference model catalog.

Related topics

View Technology Reference Model technical debts

View all TRM phases

Create a TRM product in Enterprise Architecture Workspace

View all TRM categories

View all TRM products

Update TRM technical debt data using scheduled job

Request a TRM product in Enterprise Architecture Workspace

View all TRM products grouped by product category

Request a TRM product lifecycle in Enterprise Architecture Workspace

Associate an Architectural Artifact to a TRM product

Associate an Architectural Artifact to a TRM product

As an Enterprise Architect, you can associate an architectural artifact to a TRM product.

Before you begin

You must be part of the Enterprise Architect Group.

Role required: sn_apm.apm_analyst

Procedure

1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Technology Portfolio page by selecting the Technology Portfolio icon  .
3. Open any existing *TRM* product.

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4. Select **New**.
5. On the form, fill in the fields.

   For field information, see Create architectural artifact form.

   To edit any existing artifact, select the artifact and make the necessary changes.

6. Select **Submit**.
   An architectural artifact gets created and associated to the TRM product. The Related Entities tab of the artifact shows the TRM product associated to it.

Related topics

- Create TRM product lifecycles in Enterprise Architecture Workspace
- View Technology Reference Model technical debts
- View all TRM phases
- Create a TRM product in Enterprise Architecture Workspace
- View all TRM categories
- View all TRM products
- Update TRM technical debt data using scheduled job
- Request a TRM product in Enterprise Architecture Workspace
- View all TRM products grouped by product category
- Request a TRM product lifecycle in Enterprise Architecture Workspace

View product capabilities associated with a Technology Reference Model product

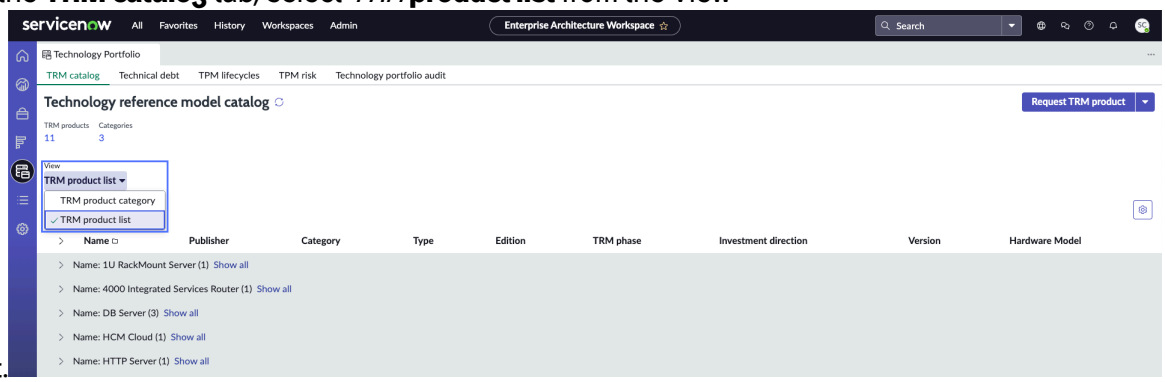
You can view the list of product capabilities associated with Technology Reference Model (TRM) product, in the Enterprise Architecture Workspace.

Before you begin

Role required: sn_apm.apm_user

Procedure

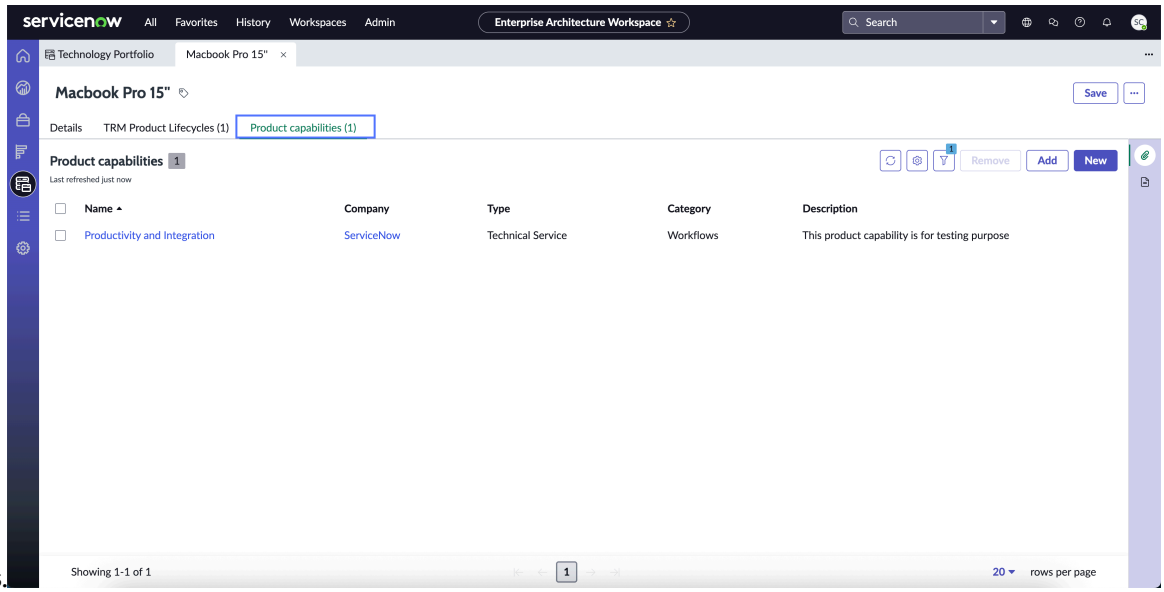
1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Technology Portfolio page by selecting the Technology Portfolio icon .
3. In the **TRM catalog** tab, select *TRM* **product list** from the View list.



4. Select the expand row icon ( ) next to the TRM product that you want to view the associated product capabilities for.

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5. Select the TRM product.
6. Select **Product capabilities**.



Result

A list of product capabilities associated with the TRM product is displayed.

Related topics

- Exploring product capabilities
- Create product capabilities and associate it with a Technology Reference Model product
- Add an existing product capability to a Technology Reference Model product
- Remove product capabilities from a TRM product

Create product capabilities and associate it with a Technology Reference Model product

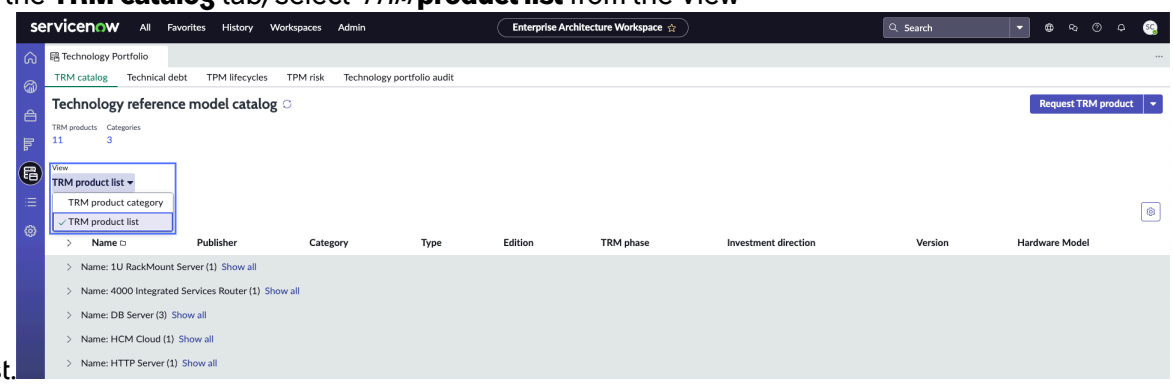
You can create product capabilities and associate it with Technology Reference Model (TRM) products in the Enterprise Architecture Workspace.

Before you begin

Role required: sn_apm.apm_user

Procedure

1. Navigate to **Workspace** > *`Enterprise Architecture Workspace`*.
2. Open the Technology Portfolio page by selecting the Technology Portfolio icon .
3. In the **TRM catalog** tab, select *TRM* **product list** from the View list.

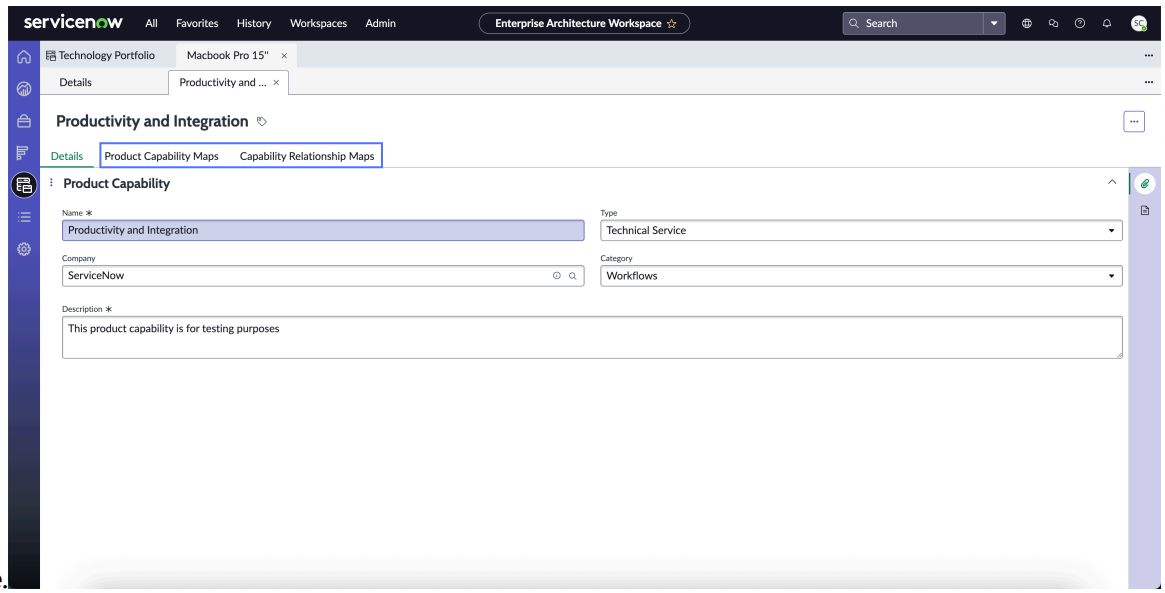


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4. Select the expand row icon ( ) next to the TRM product that you want to create and associate new product capabilities to.
5. Select the TRM product.
6. Select **Product capabilities**.
7. To create a new product capability and associate with the TRM product, select **New**.
8. In the Create New Product Capability page, fill in the form fields.

   For field information, see Create product capability form.

9. Select **Save**.



Result

The product capability is added to the TRM product.

Related topics

- Exploring product capabilities
- View product capabilities associated with a Technology Reference Model product
- Add an existing product capability to a Technology Reference Model product
- Remove product capabilities from a TRM product

Add an existing product capability to a Technology Reference Model product

You can add existing product capabilities to Technology Reference Model (TRM) products in the Enterprise Architecture Workspace.

Before you begin

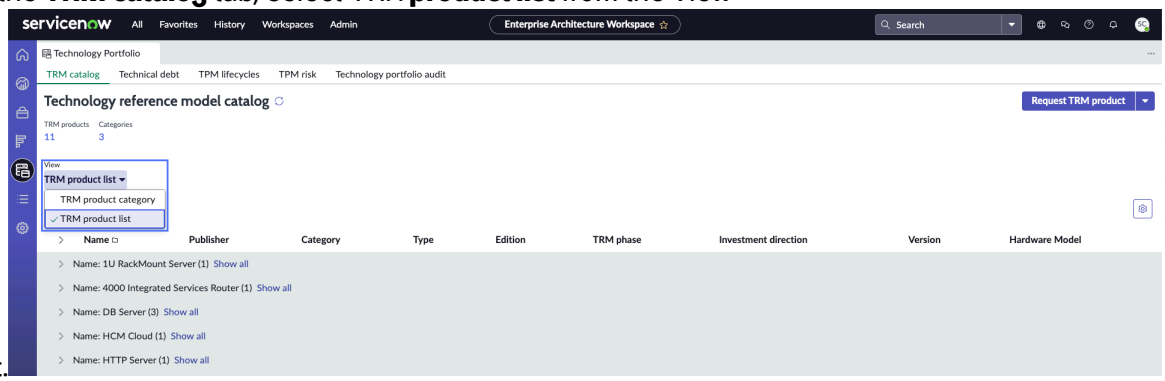
Role required: sn_apm.apm_user

Procedure

1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Technology Portfolio page by selecting the Technology Portfolio icon .

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3. In the **TRM catalog** tab, select *TRM* **product list** from the View list.



4. Select the expand row icon ( ) next to the TRM product that you want to add existing product capabilities to.
5. Select the TRM product.
6. Select **Product capabilities**.
7. Select **Add**.
8. In the **Add product capability** pop-up window, select the existing product capability.
9. Select **OK**.

Result

The existing product capability is added to the TRM product.

Related topics

- Exploring product capabilities
- View product capabilities associated with a Technology Reference Model product
- Create product capabilities and associate it with a Technology Reference Model product
- Remove product capabilities from a TRM product

Remove product capabilities from a TRM product

You can remove the product capabilities associated with Technology Reference Model (TRM) products in the Enterprise Architecture Workspace, confirming only the relevant and current product capabilities are associated with the TRM products.

Before you begin

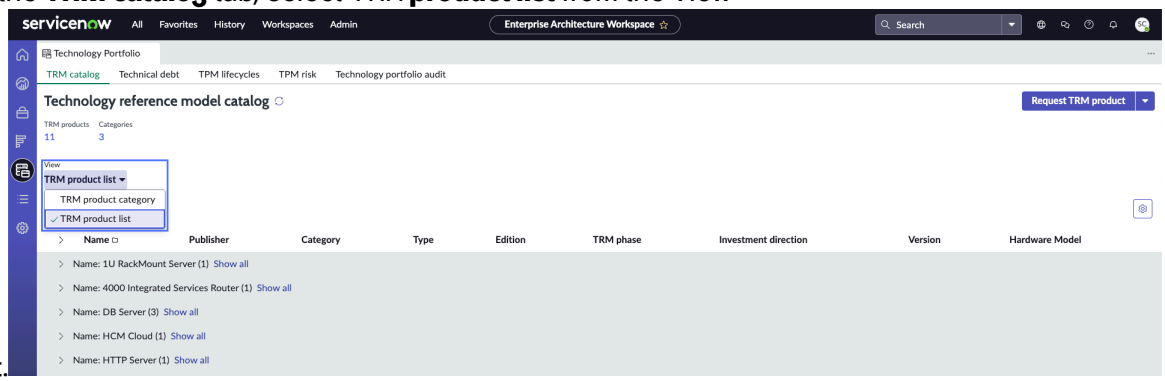
Role required: sn_apm.apm_user

Procedure

1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Technology Portfolio page by selecting the Technology Portfolio icon .

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3. In the **TRM catalog** tab, select *TRM* **product list** from the View list.



4. Select the expand row icon ( ) next to the TRM product that you want to remove the product capabilities for.
5. Select the TRM product.
6. Select **Product capabilities**.
7. Select the check box next to the product capability that you want to remove and select **Remove**.
   A confirmation message appears.
8. Select **Remove**.

Result

The product capability is removed from the TRM product.

Related topics

- Exploring product capabilities
- View product capabilities associated with a Technology Reference Model product
- Create product capabilities and associate it with a Technology Reference Model product
- Add an existing product capability to a Technology Reference Model product

View business applications associated with a Technology Reference Model product

You can view the list of business applications associated with Technology Reference Model (TRM) products, in the Enterprise Architecture Workspace (EA Workspace).

Before you begin

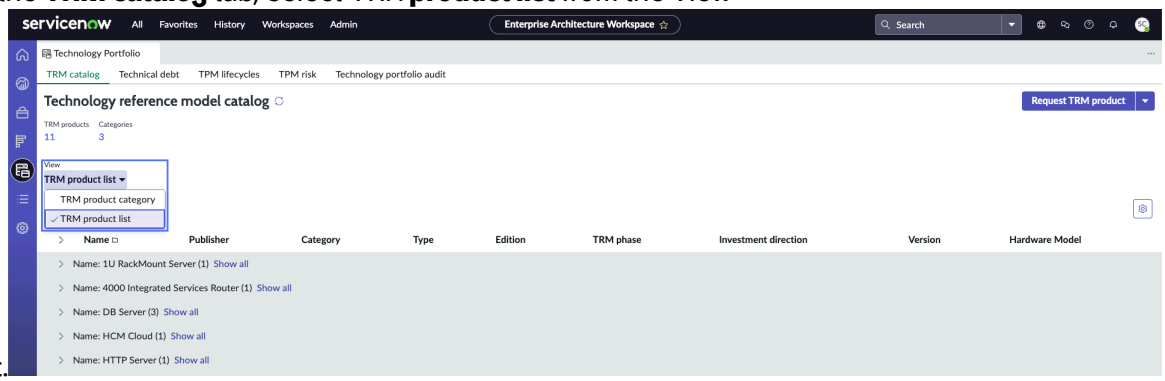
Role required: sn_apm.apm_user

Procedure

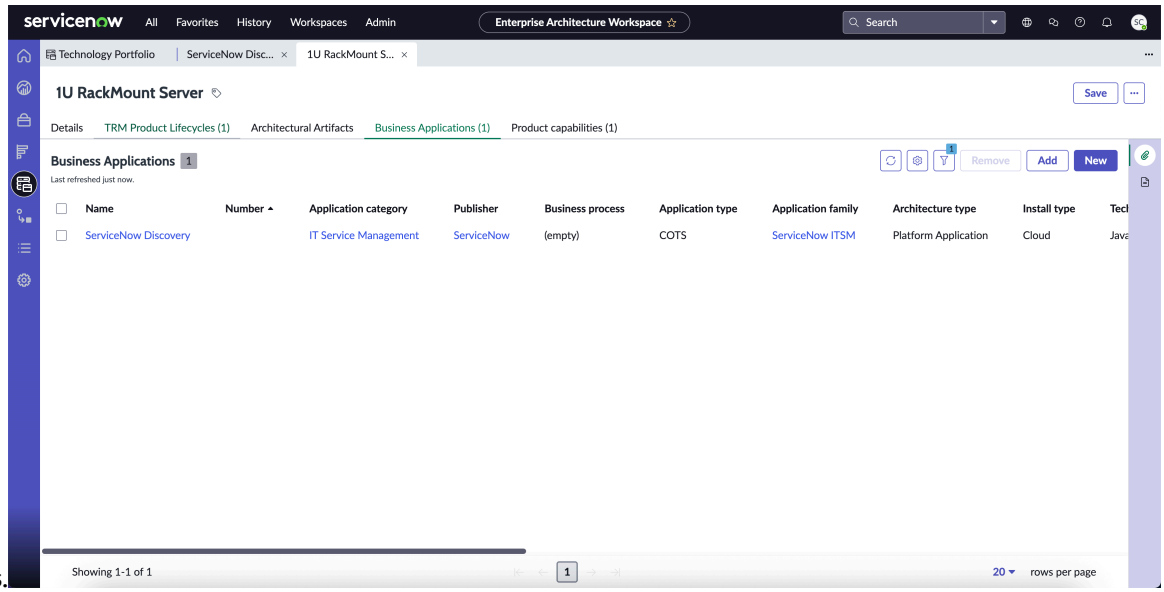
1. Navigate to **Workspace** > *`Enterprise Architecture Workspace`*.
2. Open the Technology Portfolio page by selecting the Technology Portfolio icon .

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3. In the **TRM catalog** tab, select *TRM* **product list** from the View list.



4. Select the expand row icon ( ) next to the TRM product that you want to view the associated business applications for.
5. Select the TRM product.
6. Select **Business Applications**.



Result

A list of business applications associated with the TRM product is displayed.

Related topics

- Technology Reference Model in Enterprise Architecture Workspace
- Exploring business applications
- Working with Technology Reference Model (TRM) in EA Workspace
- Working with an application portfolio

Create a business application and associate with a Technology Reference Model product

You can create business applications and associate it with Technology Reference Model (TRM) products in the Enterprise Architecture Workspace (EA Workspace).

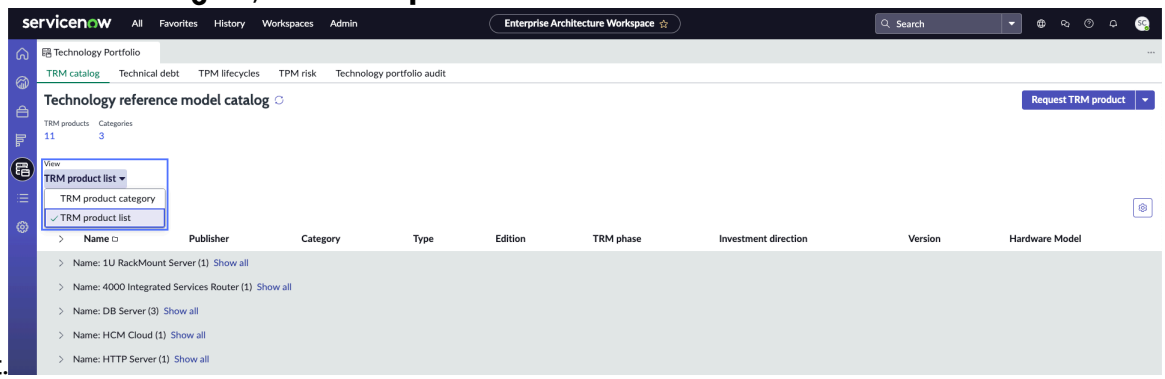
Before you begin

Role required: sn_apm.apm_analyst

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Procedure

1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Technology Portfolio page by selecting the Technology Portfolio icon .
3. In the **TRM catalog** tab, select *TRM* **product list** from the View list.



4. Select the expand row icon ( ) next to the TRM product that you want to create and associate new business applications to.
5. Select the TRM product.
6. Select **Business Applications**.
7. To create a business application and associate with the TRM product, select **New**.
8. In the Create New Business Application page, fill in the form fields.

   For field information, see Business application form.
9. Select **Save**.

Result

The business application is added to the TRM product.

Related topics

- Technology Reference Model in Enterprise Architecture Workspace
- Exploring business applications
- Working with Technology Reference Model (TRM) in EA Workspace
- Working with an application portfolio

Add an existing business application to a Technology Reference Model product

You can add existing business application to Technology Reference Model (TRM) products in the Enterprise Architecture Workspace.

Before you begin

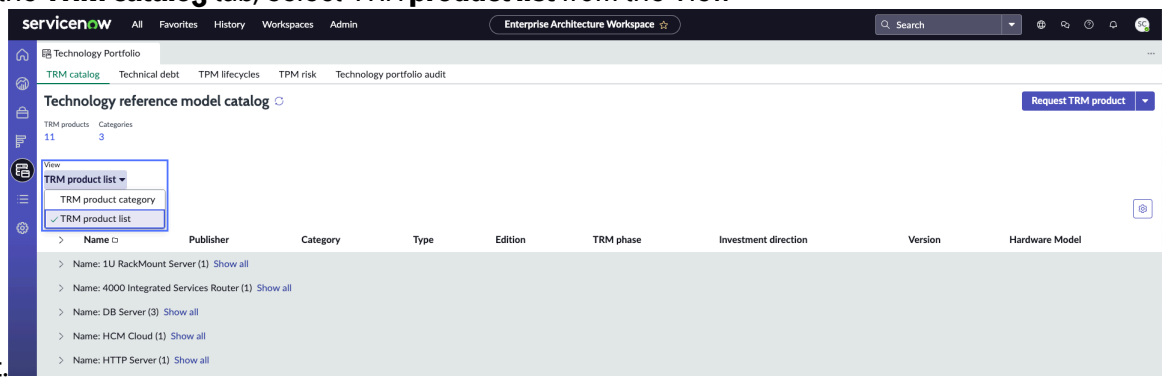
Role required: sn_apm.apm_user

Procedure

1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Technology Portfolio page by selecting the Technology Portfolio icon .

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3. In the **TRM catalog** tab, select *TRM* **product list** from the View list.



4. Select the expand row icon ( ) next to the TRM product that you want to add existing business applications to.
5. Select the TRM product.
6. Select **Business Applications**.
7. Select **Add**.
8. In the **Add business application** pop-up window, select the existing business application.
9. Select **OK**.

Result

The existing business application is added to the TRM product.

Related topics

- Technology Reference Model in Enterprise Architecture Workspace
- Exploring business applications
- Working with Technology Reference Model (TRM) in EA Workspace
- Working with an application portfolio

Remove business applications associated with a Technology Reference Model product

You can remove the business applications associated with Technology Reference Model (TRM) products in the Enterprise Architecture Workspace, confirming only the relevant and current business applications are associated with the TRM products.

Before you begin

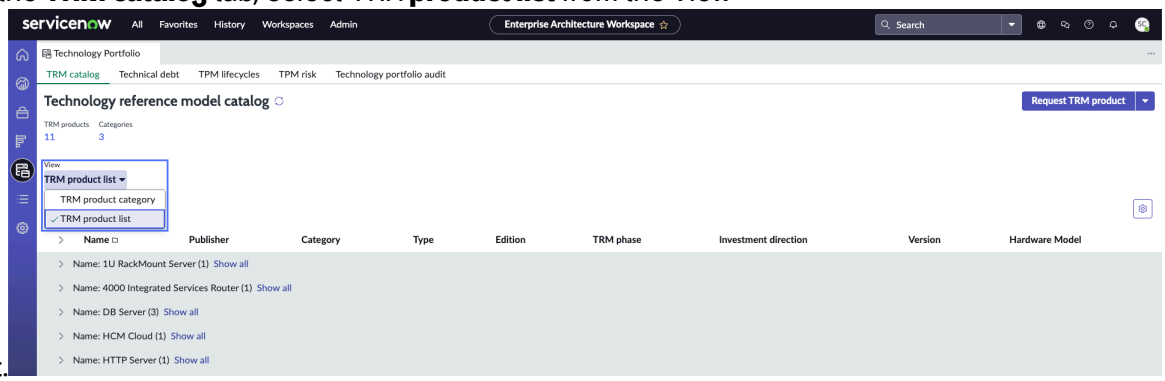
Role required: sn_apm.apm_user

Procedure

1. Navigate to **Workspace** > *`Enterprise Architecture Workspace`*.
2. Open the Technology Portfolio page by selecting the Technology Portfolio icon .

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3. In the **TRM catalog** tab, select *TRM* **product list** from the View list.



4. Select the expand row icon ( ) next to the TRM product that you want to remove the business application for.
5. Select the TRM product.
6. Select **Business Applications**.
7. Select the check box next to the business applications that you want to remove and select **Remove**.
   A confirmation message appears.
8. Select **Remove**.

Result

The business application is removed from the TRM product.

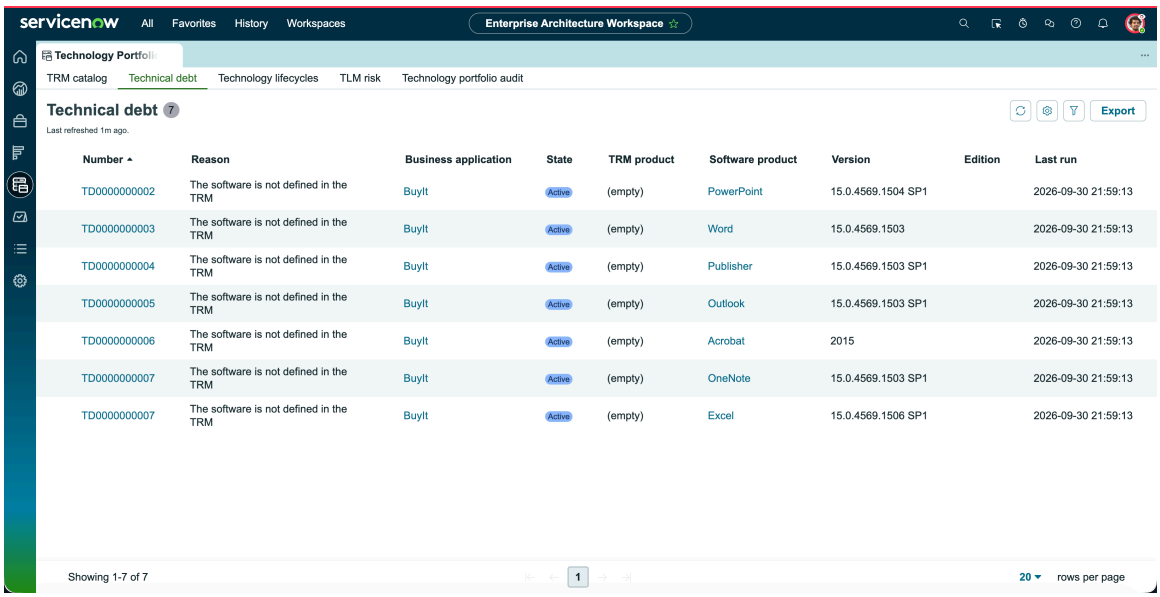
View Technology Reference Model technical debts

View Technology Reference Model (TRM) technical debts created for products that aren't aligned with TRM phases and standards.

Before you begin

Role required: sn_apm.apm_analyst

About this task



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The *Populate TRM technical debts in the EA Workspace* scheduled job creates entries in the TRM Technical Debt [sn_apm_trm_standards_technical_debt] table. This table references software in business applications that is not aligned with TRM software phases.

The table identifies software that either is not defined in TRM or has TRM product lifecycles that restrict software usage. For information about technical debt calculation, see Technical debt calculation.

Note: The *Populate TRM technical debts in the EA Workspace* scheduled job is available only when the Software Asset Management (SAM) Foundation or Software Asset Management (SAM) Professional plugin is installed.

Technical debt records persist across job runs instead of being deleted and re-created. Each record moves between Active, Resolved, and Archived states. For details, see TRM technical debt states and transitions.

Procedure

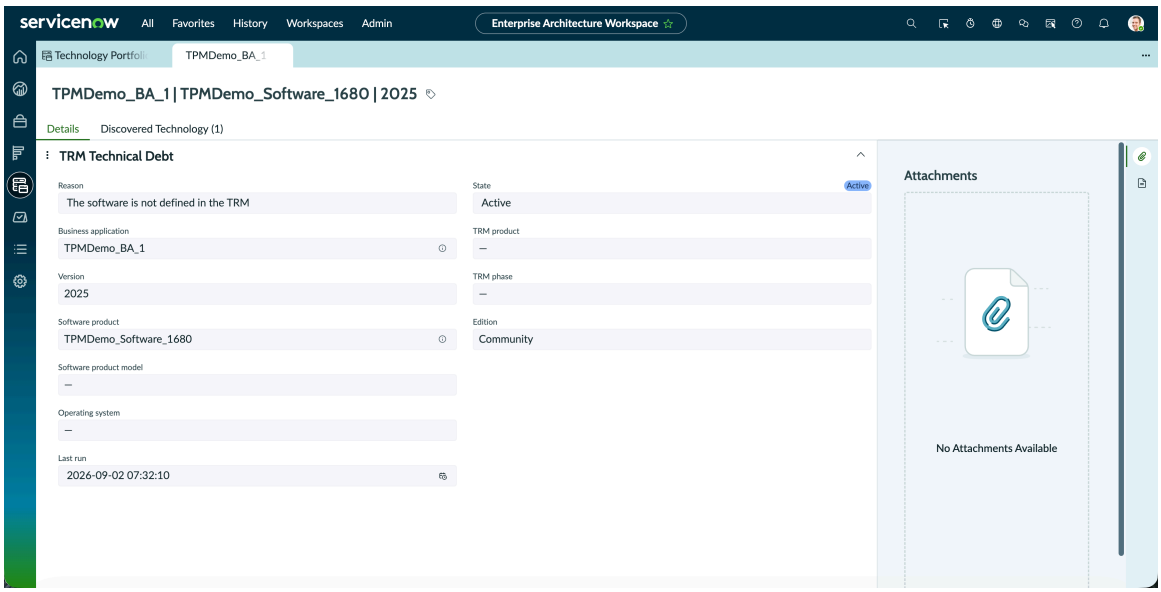
1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Select the Technology Portfolio icon to open the Technology Portfolio page.
3. Select **Technical Debt**.

   Note: You can also open this list directly by selecting the **Business applications with TRM technical debt** card in the **Portfolio Overview and Health** section on the *Enterprise Architecture Workspace* home page.

4. In the **Number** column, select a value to open the technical debt record.

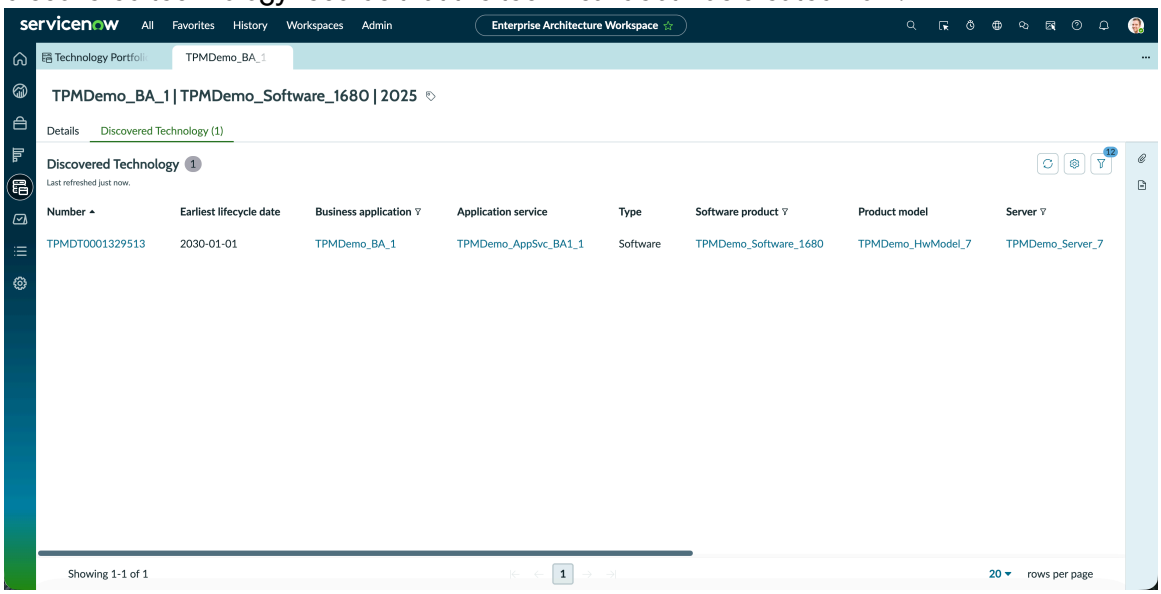
   Note: Technical debt records created before an upgrade to *Enterprise Architecture Workspace* version 10.1.3 display **(empty)** in the **Number** column. Select **(empty)** to open these records.

   For field information, see TRM technical debt form.



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5. In the technical debt record, select the **Discovered Technology** related list to view the TPM discovered technology records that the technical debt was created from.



Result

The list displays TRM products, associated business application details, and the reason for each technical debt. Use this information to identify and address alignment issues in your technology portfolio.

Related topics

- View all TRM phases
- Create a TRM product in Enterprise Architecture Workspace
- View all TRM categories
- View all TRM products
- Update TRM technical debt data using scheduled job
- Request a TRM product in Enterprise Architecture Workspace
- View all TRM products grouped by product category
- Request a TRM product lifecycle in Enterprise Architecture Workspace
- Associate an Architectural Artifact to a TRM product
- Create TRM product lifecycles in Enterprise Architecture Workspace
- Technology Reference Model in Enterprise Architecture Workspace
- View or update your TRM requests
- TRM technical debt states and transitions
- Configure technical debt settings

Update TRM technical debt data using scheduled job

Run the scheduled job to update technical debt data based on Technology Reference Model (TRM) phases. This job identifies products not approved for use in your enterprise and can be scheduled to run periodically.

Before you begin

Role required: admin

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About this task

Running this job populates technical debt records for business applications based on the TRM phases you define. The job compares installed products against approved TRM phases to identify technical debt.

Note: The *Populate TRM technical debts in the EA Workspace* scheduled job is available only when the Software Asset Management (SAM) Foundation or Software Asset Management (SAM) Professional plugin is installed.

Procedure

1. Navigate to **All** > **System Definition** > **Scheduled Jobs**.
2. Search for and open the *Populate TRM technical debts in the EA Workspace* scheduled job.
3. Select **Execute Now**.

Result

After executing the scheduled job, the Technical Debt [sn_apm_trm_standards_technical_debt] table gets updated with the latest technical debt data for your application portfolio. It updates the values in the table each time after you run the job.

Existing technical debt records aren't deleted and re-created on each run. Instead, each record's **State** moves between Active, Resolved, and Archived based on what the job finds. For details, see TRM technical debt states and transitions.

Related topics

View Technology Reference Model technical debts

TRM technical debt states and transitions

Technical debt settings

Governing TRM product fields

Update the retention period for archived technical debts

Change how long an Archived technical debt record is retained before the *Delete Archived Tech Debts* scheduled job permanently deletes it.

Before you begin

Role required: sn_apm.apm_admin

About this task

The *sn_apm_tpm.monthsToDeleteArchivedTechDebt* property controls how many months an Archived technical debt record is kept before permanent deletion. The *Delete Archived Tech Debts* scheduled job runs automatically on the first day of every month and reads this property. It deletes Archived records whose **Updated** value is older than the configured number of months. The default retention period is 12 months.

Procedure

1. Select **All** and in the navigation filter enter *sys_properties.list*.
2. Open the *sn_apm_tpm.monthsToDeleteArchivedTechDebt* system property.
3. In the **Value** field, enter the number of months to retain Archived technical debt records before permanent deletion.

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4. Select **Update**.
   The *Delete Archived Tech Debts* job applies the new retention period when it runs automatically on the first day of the next month. To apply the change immediately, run the job manually. For information, see Run the Delete Archived Tech Debts job.

Related topics

- TRM technical debt states and transitions
- Run the Delete Archived Tech Debts job
- Scheduled jobs for TLM in the EA Workspace

Run the Delete Archived Tech Debts job

Run the *Delete Archived Tech Debts* scheduled job manually or modify its default monthly schedule to match your maintenance window.

Before you begin
Role required: admin

About this task
The job runs monthly by default on day 1 at 00:00:00 in the instance time zone. You can modify the schedule to align with your maintenance windows. You can also run the job on demand to immediately remove archived technical debt records that exceed the retention period.

Procedure

1. Navigate to **All** > **System Definition** > **Scheduled Jobs**.
2. In the Name column, search for and open *Delete Archived Tech Debts*.
3. **Optional:** To modify the schedule, update the **Run**, **Day**, **Time zone**, or **Time** fields.
4. **Optional:** Select **Update** to save your changes.
5. To run the job immediately instead of waiting for its next scheduled run, select **Execute Now**.

Result
The job deletes archived technical debt records whose **Updated** value is older than the retention period set in the system property *sn_apm_tpm.monthsToDeleteArchivedTechDebt*. For details on setting that retention period, see Update the retention period for archived technical debts.

Related topics

- Update the retention period for archived technical debts
- TRM technical debt states and transitions
- Scheduled jobs for TLM in the EA Workspace

Run a job to sync TRM product names in EA Workspace

Run a scheduled job to sync the names of Technology Reference Model (TRM) products with the names of their linked Software Asset Management (ServiceNow Otto for SAM) software products.

Before you begin
Role required: admin

About this task
When you create a TRM product by associating it with a ServiceNow Otto for SAM software product, the TRM product inherits the ServiceNow Otto for SAM software product name at creation time. If the ServiceNow Otto for SAM software product name is later updated — for

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example, when a vendor renames a product or when the content library is updated with a corrected name — the linked TRM product name is not automatically updated. You can run this scheduled job on an ad hoc basis whenever you need to sync TRM product names with the latest ServiceNow Otto for SAM software product.

Note: ServiceNow Otto for SAM software products are managed in the Software Product (samp_sw_product) table, which is outside the EA Workspace. Name changes must be synced manually using this job.

Procedure

1. Navigate to **All** > **System Definition** > **Scheduled Jobs**.
2. Open the scheduled job *Sync TRM Product Names with Software Products*.

   Note: The scheduled job is set to run on demand and is inactive by default. If a banner appears indicating that the record is in the EA Workspace application but your current application is Global, you don't need to change the application scope. The **Execute Now** button is still available.

3. Select **Execute Now**.

Result

The names of TRM products of type **Software** that are linked to a ServiceNow Otto for SAM software product are updated. The updated names match the latest ServiceNow Otto for SAM software product names in the TRM Products (sn_apm_trm_standards_product) table. Only TRM products whose names differ from their linked ServiceNow Otto for SAM software product are updated; the rest are skipped.

To verify the job outcome, navigate to **All** > **System Logs** > **Application Logs** and search for *SyncTRMProductNames*. The log entry shows:

- Update count: Number of TRM product names that were updated
- Skip count: Number of TRM products skipped because their names already matched, or because the software product reference was invalid
- Error count: Number of records that could not be updated

Related topics

Request a TRM product in Enterprise Architecture Workspace

Create a TRM product in Enterprise Architecture Workspace

View all TRM products

View all TRM products grouped by product category

Export Technology Reference Model product category data to Excel or CSV

Export the Technology Reference Model (TRM) list view data to Microsoft Excel or CSV so that you can use the data to share with stakeholders and prepare for analysis.

Before you begin

Role required: sn_apm.apm_user

Procedure

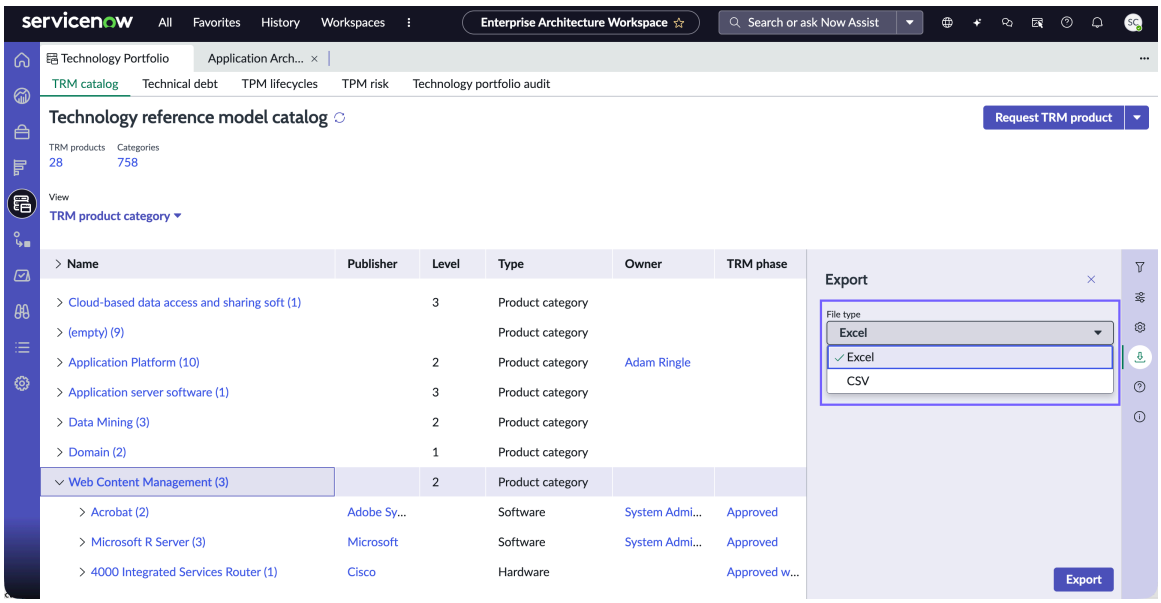
1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Technology Portfolio page by selecting the Technology Portfolio icon  .

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3. Select the export icon ( ) on the Technology reference model catalog page.

   Note: Verify that **TRM product category** is selected in the View drop-down.

4. From the File type drop-down on the Export window, select **Excel** or **CSV** to export the data to a Microsoft Excel or CSV file respectively.



5. Select **Export**.

Result
A file with the selected format is downloaded and saved in your local system.

Working with Gantt chart views in EA Workspace

The Gantt charts in the Enterprise Architecture Workspace allow toggling between TPM (Technology Portfolio Management) and TRM (Technology Reference Model) views. This enables enterprise architects to visualize key lifecycle stages such as deployment, maintenance, and retirement. Identify risks like outdated configurations or unsupported technologies.

Related topics

Gantt view of TLM and TRM lifecycle timelines

View TPM and TRM lifecycle timelines on the Gantt chart

Use the Gantt chart to view and track Technology Lifecycle Management (TLM) and Technology Reference Model (TRM) lifecycle timelines.

Before you begin
Role required: sn_apm.apm_analyst

Note: The lifecycle data for software products is displayed only when the Software Asset Management (SAM) Foundation or Software Asset Management (SAM) Professional plugin is installed.

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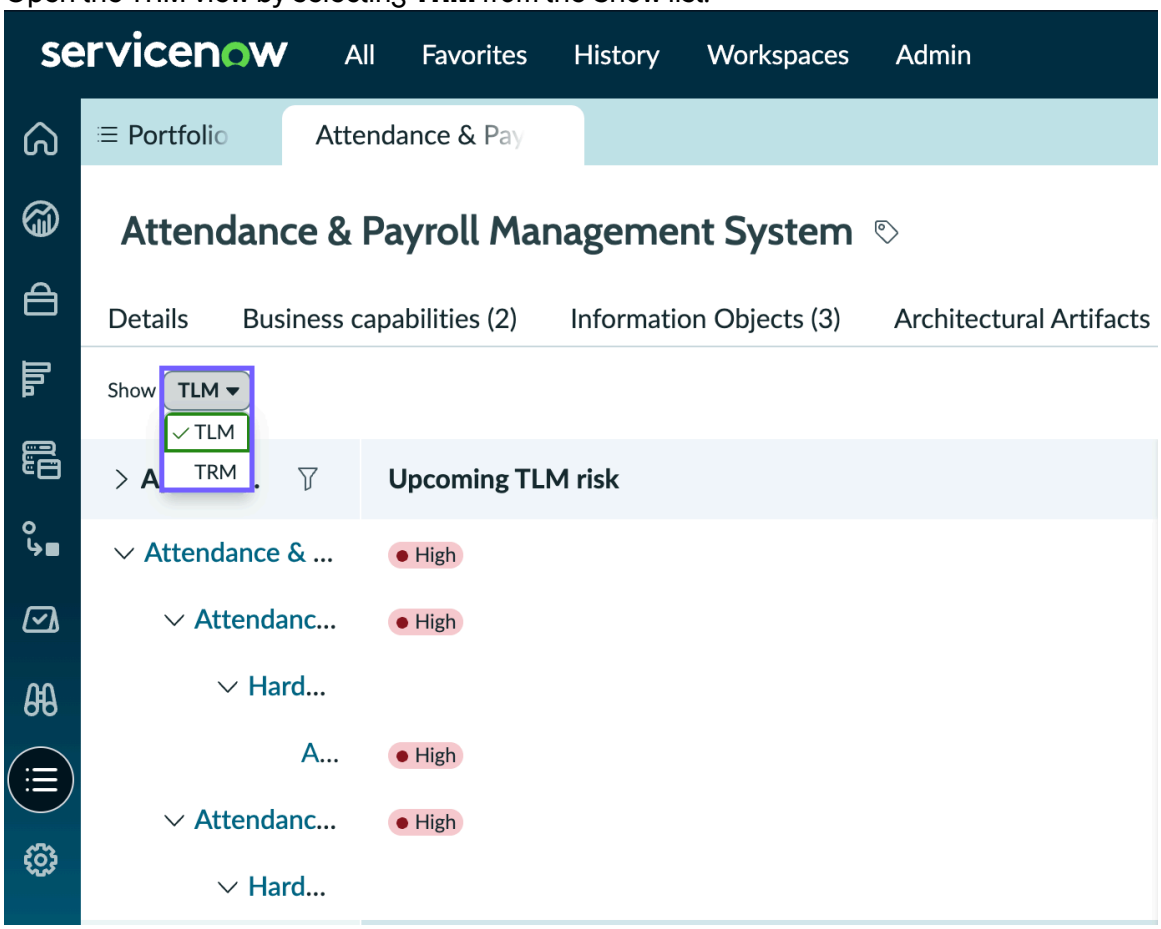
Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Portfolio List view by selecting the portfolio icon .
3. Next to **Business Applications**, select the expand row icon ( ) and then select **All**.
4. Select **All**.
5. Select the business application that you want to view the TLM and TRM lifecycle timelines for.
6. Select **More** if you don't see the **Lifecycle Timelines** tab.
7. Select **Lifecycle Timelines**.
   The Gantt chart appears for TLM and shows the business applications along with their application services.

   Note:

   By default, the TLM view is displayed.

8. Next to the business application and its associated application services, select the expand row icon ( ) to see the lifecycle timeline bars in the Gantt chart.
   Alternatively, you can select the expand icon ( ) next to the Application column header.
9. Open the TRM view by selecting **TRM** from the Show list.



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Related topics

- Working with Technology Reference Model (TRM) in EA Workspace
- Working with Technology Lifecycle Management (TLM) in EA Workspace
- Working with application rationalization

Working with Enterprise Modeling and Visualization

Enterprise Modeling and Visualization provides a structured, visual framework for managing the complex relationships between IT systems, business processes, and organizational goals.

With Enterprise Modeling and Visualization, you can create and maintain architecture diagrams using built-in shape libraries such as General, Common Service Data Model, Amazon Web Services, Enterprise Architecture Extended, ArchiMate, and Business Process Model and Notation. You can connect shapes with relationship lines and label connectors to represent architectural relationships.

Associate shapes with existing records, such as business applications, capabilities, and application services, and use the side panel to view or update record details directly from the canvas.

Note: The width of the side panel is saved to your user preferences. If you resize the panel, it opens at the same width the next time you open a diagram.

You can manage diagram evolution by saving changes as new versions. Versioning enables you to maintain a history of architecture decisions and switch between versions using the version selector. You can also compare different versions of a diagram and generate a summary of the changes.

The workspace supports collaboration and governance by enabling you to share diagrams with stakeholders and submit them for review and approval using the built-in approval workflow. After approval, you can synchronize the diagram with your repository to update the underlying records.

Note:

After upgrading from Q2 2025 or Q3 2025 releases to the Q4 2025 release of Enterprise Architecture Workspace, you might observe a color display difference. Newly created shapes display color, while existing shapes for the same entity don’t.

The Q4 2025 release of Enterprise Architecture Workspace release introduced color styling to the shape library. Consequently, diagrams created in Q3 don’t display color. Following the upgrade, new shapes added to these older diagrams display color, but the previously existing shapes remain uncolored.

To update the shapes in the previously created diagrams, do the following:

- For upgrades from Q3 to Q4- You must explicitly run the relevant fix script (script name: Clean edges and synchronize shape names and met", sys_id: "2a63972eff22621076fdfffffffffbe). This is because the script was present in the Q3 release and has been modified for Q4.
- The script runs automatically as part of the upgrade process.

Related topics

- Exploring Enterprise Modeling and Visualization in the EA Workspace
- Configure Enterprise Modeling and Visualization
- Compare Enterprise Modeling and Visualization diagrams

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Compare Enterprise Modeling and Visualization diagrams

Compare different versions of Enterprise Modeling and Visualization diagrams and learn the details of the differences from the summary that is generated by ServiceNow Otto® in the Enterprise Architecture Workspace.

Before you begin

Note: Depending on your license, you will have access to certain application features, generative AI skills, agentic workflows, and AI agents. For more information, see ServiceNow product tiers.

Important: This generative AI skill is turned on by default. The skill will be automatically available to appropriate role users for the application. For more information, see AI agents, skills, and agentic workflows on by default.

You can use Now LLM Service, Azure OpenAI, Google Gemini or Anthropic Claude on AWS as the AI model provider for all generative AI skills and AI agents. Use the Configuration Controls in AI Control Tower to define which options are available, then set the skill-level preferences in the AI Admin Hub console. For more information, see Large language models on the ServiceNow AI Platform.

The default AI model provider for this skill is Azure OpenAI.

Note: Starting with the September 2026 release, Gemma 4 joins our growing portfolio of open-weight models available through Now LLM Service. The latest industry advancements are available alongside sovereignty-focused options. All models are hosted and governed by ServiceNow with the same infrastructure and data protections. Older models will remain available for existing published AI skills, agents, and agentic workflows, but will no longer be available for new development or configuration. For details, see the KB3066214: ServiceNow Otto Model Upgrades article in the Now Support Knowledge Base.

Role required: sn_apm.apm_read and sn_apm.apm_user

About this task

Enterprise Modeling and Visualization diagrams often have complex architecture layers like business capabilities, application hierarchy, and process flows. Manual comparison can be time-consuming or error-prone. Using the diagram change analysis ServiceNow Otto skill, you can quickly generate a change summary.

You can compare any two diagram versions, not just adjacent versions. For example, you can compare version 3.0 with version 1.0, or version 4 with version 2.

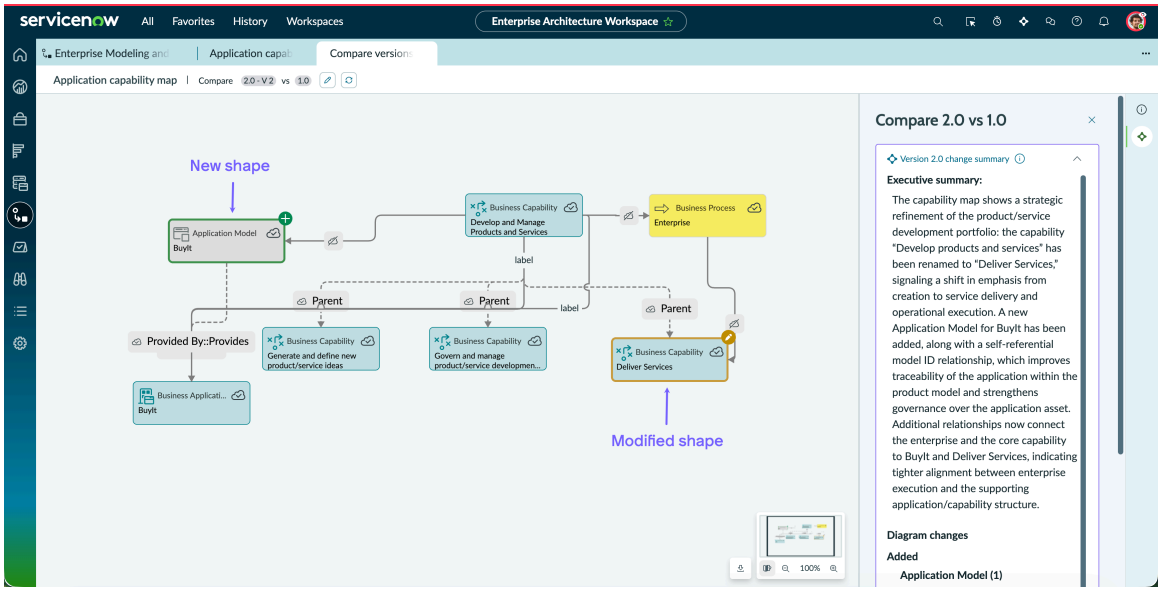
The change summary generated by ServiceNow Otto® includes an executive summary of changes between the primary version and the comparison version. The summary also includes details of shapes or entities that have been added, modified, or removed.

When you compare two diagram versions, the comparison screen highlights the differences on the canvas:

- New shapes added in the primary version are highlighted in green.
- New relationship lines added in the primary version are highlighted in green.
- Modified shapes are highlighted in yellow.

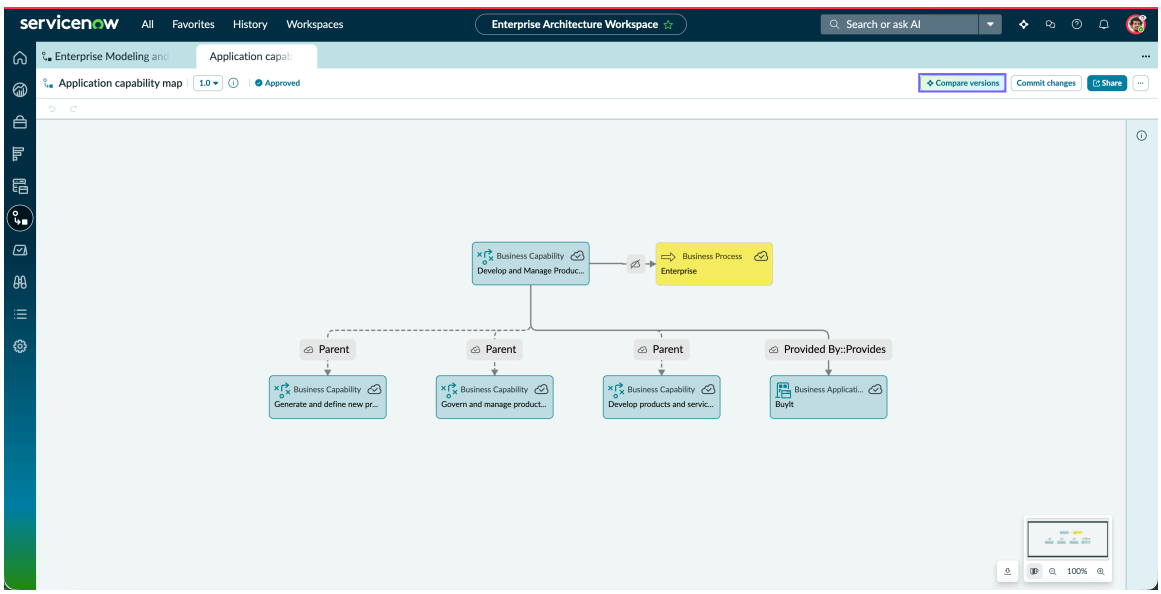
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- Modified relationship lines are highlighted in yellow.



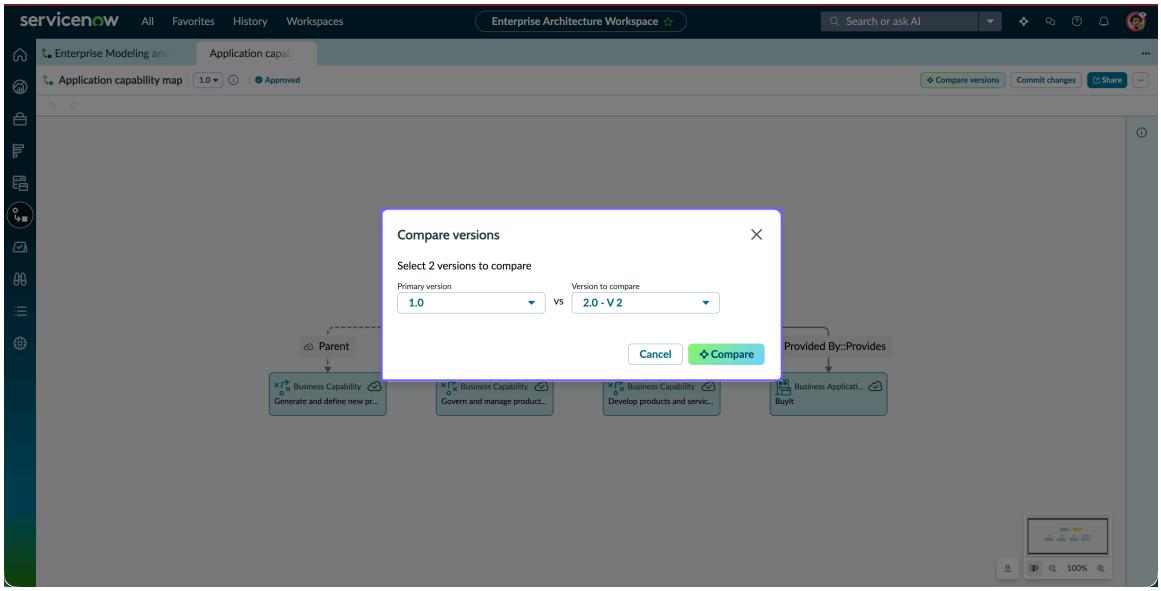
Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Modeling page by selecting the Enterprise Modeling and Visualization icon ( ).
3. Select the diagram that you want to compare versions for.
4. Select **Compare versions**.
   The **Compare versions** button isn't available when you open a diagram that has only one version.



The **Compare versions** pop-up window appears.

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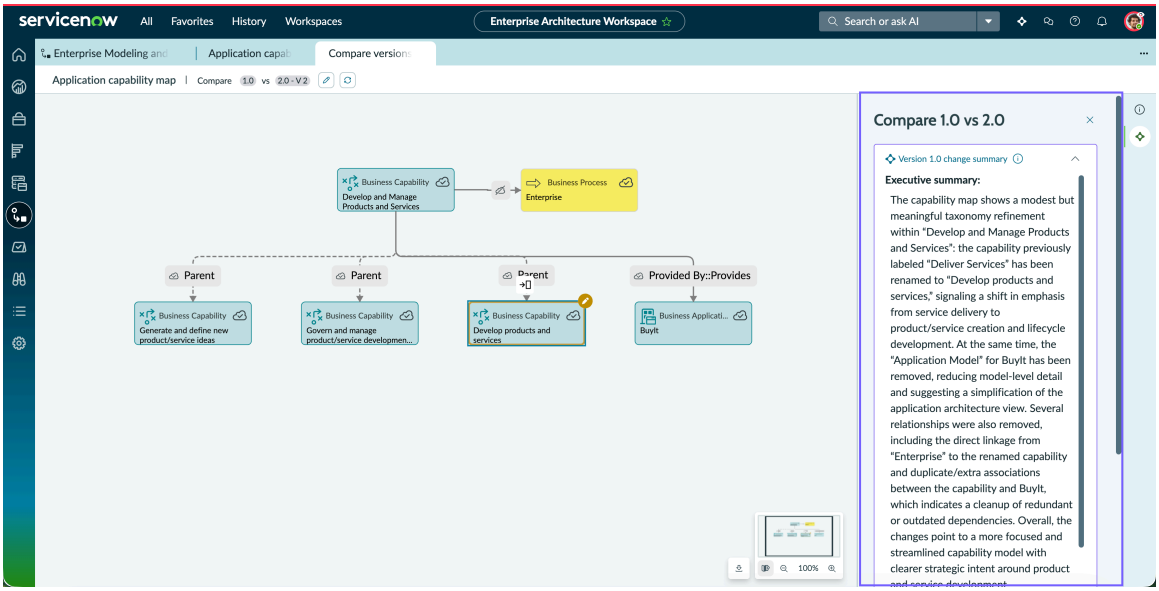


5. In the **Compare versions** pop-up window select the versions that you want to compare:
   a. Select the primary version of the diagram from the **Primary version** drop-down list.
   b. Select another version of the diagram from the **Version to compare** drop-down list.

   Note: You can compare any two versions, not just consecutive versions. For example, you can compare version 3.0 directly with version 1.0.

6. Select **Compare**.
   The **Compare versions** tab appears and a change summary is generated in the ServiceNow Otto side panel. The ServiceNow Otto side panel displays the following sections:
   - **Executive summary**: A ServiceNow Otto generated summary of the key changes between the selected versions.
   - **Diagram changes**: Changes to shapes, entities, or relationships that have been added, modified, or deleted.

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Note:

- Select the edit icon ( ) to change the existing diagram versions and generate a fresh diagram comparison summary.
- Select the refresh icon ( ) if you have changed the primary version of the diagram and want to generate a fresh diagram comparison summary.
- Select the helpful icon ( ) or not helpful icon ( ) to provide feedback on the change summary generated by ServiceNow Otto. This feedback helps ServiceNow Otto to generate better change summaries.
- Select the copy summary icon ( ) to copy the diagram change summary created by ServiceNow Otto.
- Select the ServiceNow Otto icon ( ) to close the side panel.

Related topics

Exploring ServiceNow Otto for Enterprise Architecture (EA)

Configure ServiceNow Otto for Enterprise Architecture (EA)

ServiceNow Otto for Enterprise Architecture (EA) access roles

Access Enterprise Architecture data using MCP tools

View all shape libraries

View all shape libraries available for the Enterprise Modeling and Visualization in the Enterprise Architecture Workspace.

Before you begin

Role required: sn_apm_mdtl_com.mdtl_com_user

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Setup page by selecting the Setup icon ( ).

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3. Select the expand row icon ( ) next to *Enterprise Modeling and Visualization*.
4. Select **Shape Libraries**.

Related topics

- View configuration for Enterprise Architecture Workspace
- View all entities
- View relationships configurations

View configuration for Enterprise Architecture Workspace

View all the configuration details of Enterprise Architecture Workspace.

Before you begin
Role required: sn_apm_mdtl_com.mdtl_com_user

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Setup page by selecting the Setup icon ( ).
3. Select the expand row icon ( ) next to *Enterprise Modeling and Visualization*.
4. Select **Modeling Configurations**.

Related topics

- View all shape libraries
- View all entities
- View relationships configurations

View all entities

View all entities available for the Enterprise Modeling and Visualization in the Enterprise Architecture Workspace.

Before you begin
Role required: sn_apm_mdtl_com.mdtl_com_user

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Setup page by selecting the Setup icon ( ).
3. Select the expand row icon ( ) next to *Enterprise Modeling and Visualization*.
4. Select **Entity Configurations**.

Related topics

- View all shape libraries
- View configuration for Enterprise Architecture Workspace
- View relationships configurations

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View relationships configurations

View all relationship configurations available for the Enterprise Modeling and Visualization in the Enterprise Architecture Workspace.

Before you begin

Role required: sn_apm_mdtl_com.mdtl_com_user

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Setup page by selecting the Setup icon ().
3. Select the expand row icon ( ) next to *Enterprise Modeling and Visualization*.
4. Select **Relationships**.

Related topics

- View all shape libraries
- View all entities
- View configuration for Enterprise Architecture Workspace
- Search shapes in a diagram
- Add related records in the modeling diagram
- Share a modeling diagram
- Commit diagram changes
- Save as a version
- Duplicate a modeling diagram
- Submit a modeling diagram for approval
- Synchronize a shape to the database
- Approve or reject a modeling diagram request
- Delete a shape

Show shape controls without hovering

Enable an accessibility preference to keep all contextual buttons and controls on diagram shapes visible at all times, without requiring you to hover.

Before you begin

Role required: sn_apm.apm_user

About this task

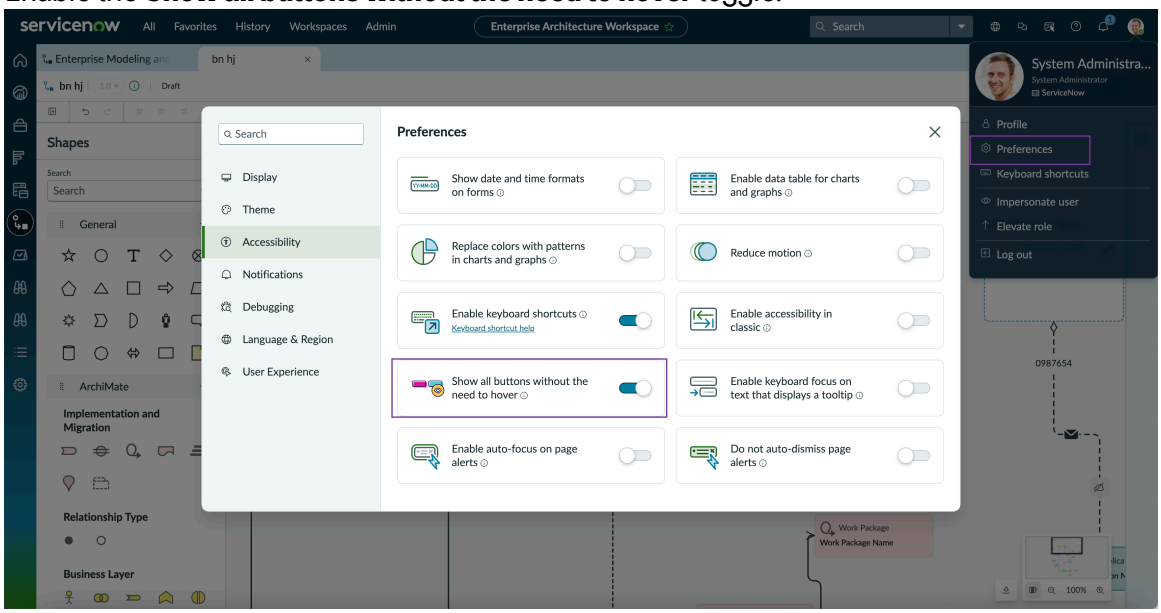
By default, contextual buttons and controls on diagram shapes are hidden and appear only when you hover over a shape. When you enable the **Show all buttons without the need to hover** toggle, all contextual buttons and controls remain visible on shapes at all times. This makes it easier to interact with shapes and navigate the canvas, particularly when using assistive technologies.

This preference applies to all shape types in the diagram canvas, including General shapes, ArchiMate shapes, AWS shapes, CSDM shapes, and BPMN shapes. The setting is saved per user and does not affect other users on the same instance.

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Procedure

1. Select your profile avatar in the top-right corner of the *Enterprise Architecture Workspace*.
2. Select **Preferences**.
3. In the Preferences dialog, select **Accessibility**.
4. Enable the **Show all buttons without the need to hover** toggle.



Create a blank diagram using modeling in the EA Workspace

Create a diagram and synchronize it to the ServiceNow database.

Before you begin

Role required: sn_apm.apm_user

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Modeling page by selecting the Modeling icon ( ).
3. Select **New**.
4. Select **Blank diagram**.
5. Enter a name for the artifact and select the architectural category it's associated with.
6. Select **Create diagram**.

Result

An empty diagram page opens in a new tab. You can add shapes and create a diagram.

Note:

- You can add a shape to the canvas by selecting the shape or by dragging it from the **Shapes** palette to the canvas.
- Before adding a shape, hover over its icon in the **Shapes** panel to see a preview popover showing a larger view of the shape and its label.

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Related topics

- Share a modeling diagram
- Save as a version
- Duplicate a modeling diagram
- Submit a modeling diagram for approval
- Synchronize a shape to the database
- Commit diagram changes
- Add related records in the modeling diagram
- Delete a shape
- Working with business capability map
- Working with business hierarchy map
- Working with business process map
- Working with ArchiMate Shapes
- Working with custom shapes

Set shape connector properties in Enterprise Modeling and Visualization

Configure the relationship type or visual style of a connector between shapes in an enterprise modeling diagram.

Before you begin

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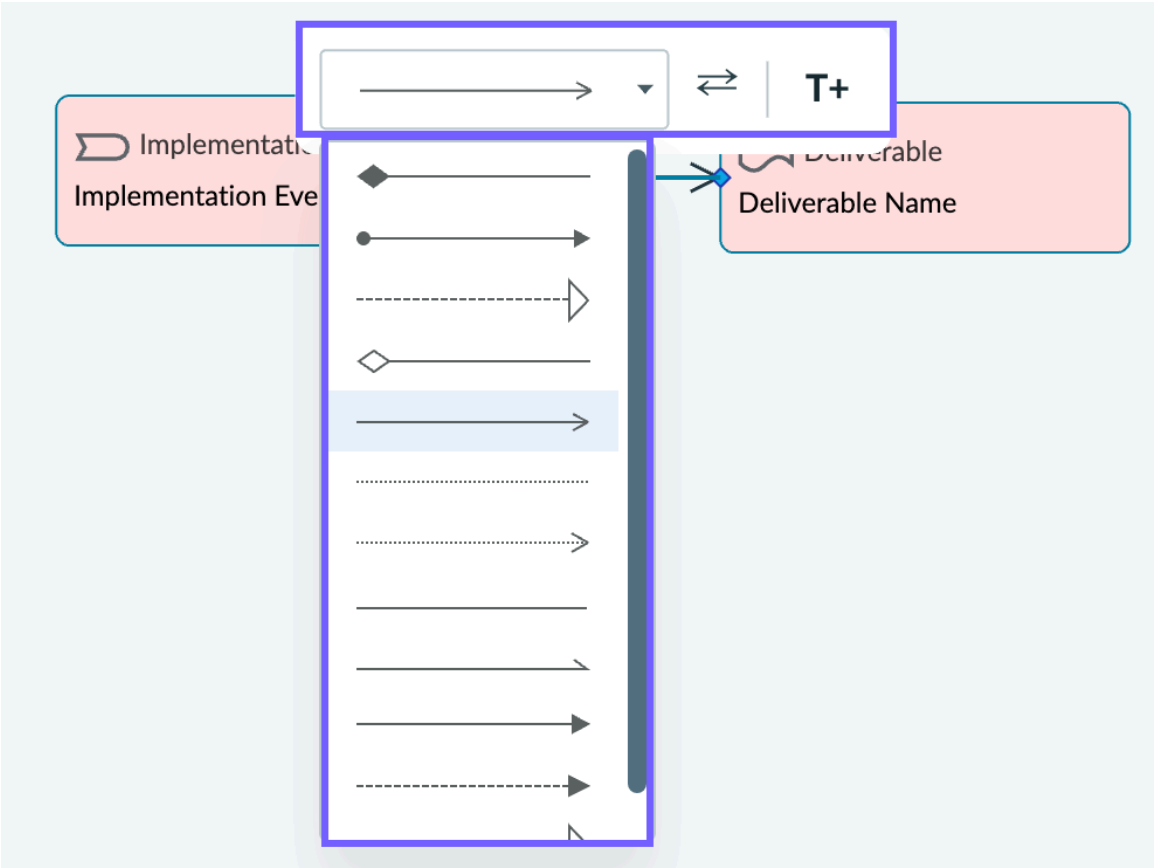
Role required: sn_apm.apm_user

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Modeling page by selecting the Enterprise Modeling and Visualization icon ( ).
3. Select a diagram from the Diagrams page or create a diagram.
4. Select a connector between two shapes.
   A toolbar appears above the connector.
5. In the toolbar, configure the connector based on the notation of the connected shapes.

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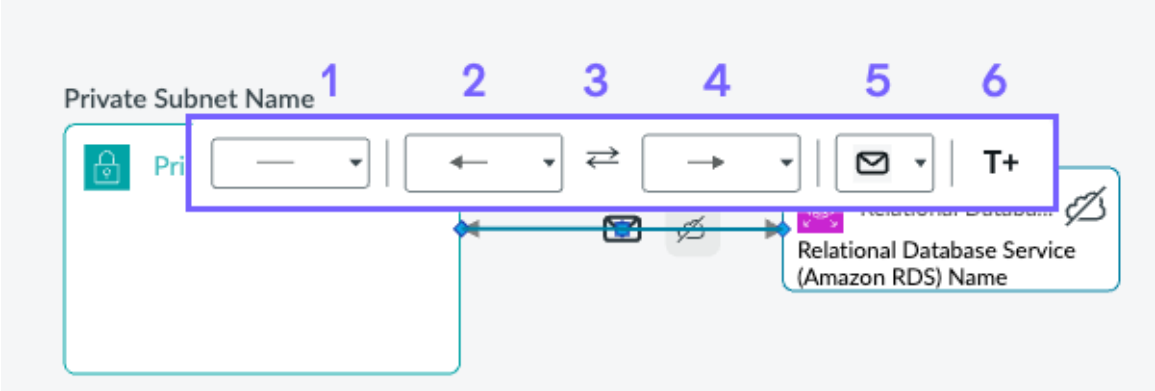
- For ArchiMate connectors (both shapes are ArchiMate shapes), open the **Link type** drop-down and select a relationship type.



- For non-ArchiMate and mixed connectors (at least one shape is non-ArchiMate), set the connector line properties using the toolbar controls.

Control	Option
Line style	Solid
	Dashed
	Dotted
Start arrow and **End arrow**	None
	Arrow
	Open arrow
	Open diamond
	Circle
	Bar
Icon	None
	Initiating message flow
	Non-initiating message flow

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Number	Control	Description
1	**Line style**	Sets the connector line to solid, dashed, or dotted.
2	**Start arrow**	Sets the arrowhead style at the starting end of the connector.
3	**Swap direction**	Reverses the connector orientation, switching the left and right sides.
4	**End arrow**	Sets the arrowhead style at the ending end of the connector.
5	**Icon**	Adds a BPMN message flow decorator icon to the connector.
6	**T+**	Adds a text label to the connector.

6. To reverse the connector direction, select **Swap direction**.
7. To add a text label to the connector, select **T+**.
   For details, see Add labels to connector lines between shapes in a diagram.

Related topics

- Create a blank diagram using modeling in the EA Workspace
- Shape connector properties in Enterprise Modeling and Visualization
- Add labels to connector lines between shapes in a diagram
- Working with ArchiMate Shapes
- Exploring Enterprise Modeling and Visualization in the EA Workspace

Add labels to connector lines between shapes in a diagram

You can enhance diagram clarity in Enterprise Modeling and Visualization by adding a descriptive text on the connector line between shapes. Connector line labels clarify the nature of the relationship between shapes, annotate the data flow direction, and provide contextual information.

Before you begin

https://service-now.portal.trainn.co/share/eEp2wTIUXYpGap4qcP7vkg/embed?autoplay=false

Role required: sn_apm.apm_user

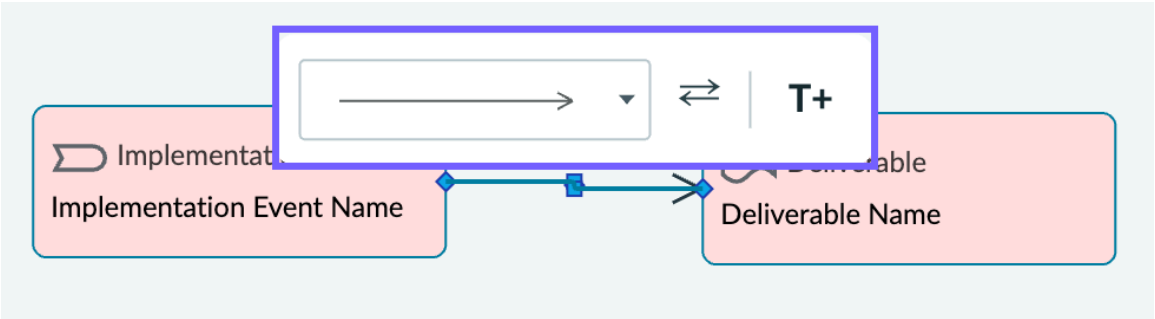
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Procedure

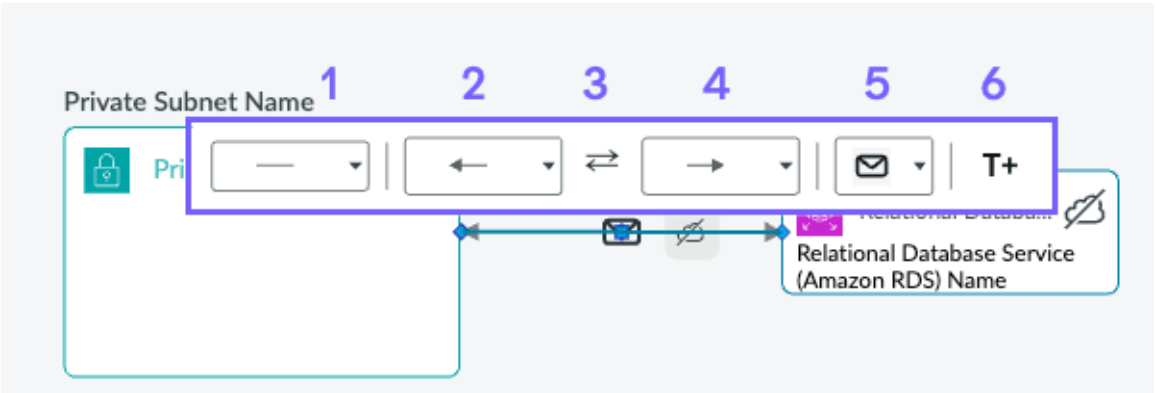
1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Modeling page by selecting the Enterprise Modeling and Visualization icon ( ).
3. Select a diagram from the Diagrams page where you want to add labels to the connector lines.
4. Select a connector line.

   A toolbar appears above the connector. The toolbar shows different controls depending on the notation of the connected shapes:

   - If both connected shapes are ArchiMate shapes, the toolbar shows the **Relationship type** drop-down, the **Swap direction** control, and the **T+** button.



   - If at least one connected shape is non-ArchiMate, the toolbar shows the **Line style**, **Start arrow**, **Swap direction**, **End arrow**, **Icon**, and **T+** controls.

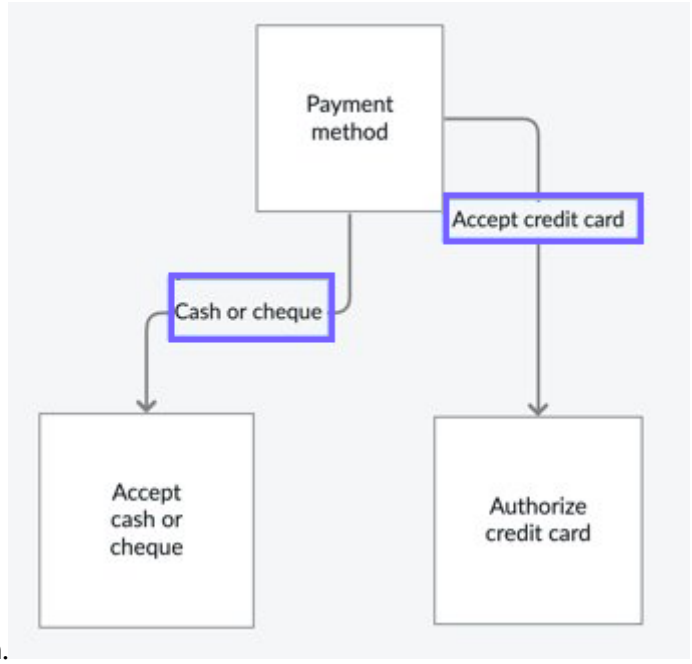


5. Select **T+** in the toolbar and enter a label for the connector line.

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Result

The connector line label is added to the diagram.



Related topics

- Exploring Enterprise Modeling and Visualization in the EA Workspace
- Shape connector properties in Enterprise Modeling and Visualization
- Set shape connector properties in Enterprise Modeling and Visualization

Working with business capability map

Model your business capabilities map using the Enterprise Modeling and Visualization. Update existing capability maps by adding other business capabilities and business applications.

Create a diagram for a business capability map

Create and model your business capability map using the Enterprise Modeling and Visualization.

Before you begin

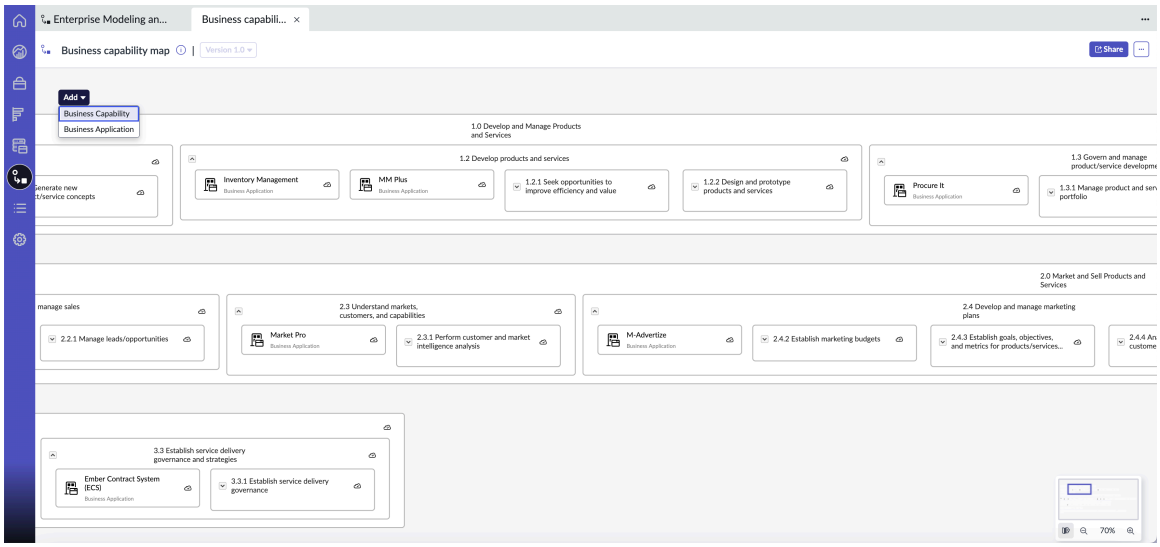
Role required: sn_apm.apm_user

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Modeling page by selecting the Enterprise Modeling and Visualization icon ( ).
3. Select the **New** drop-down menu.
4. Select **Business capability map**.
5. On the Create a business capability map form, fill in the details.
   For field information, see Create a business capability map form.
6. Select **Create diagram**.

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Result



The capability diagram gets created and opened in a new tab. You can add new capabilities and business applications to the map and edit it as required. The artifact gets added to the Architectural Artifacts related list for the capability.

Related topics

- Update a business capability map
- Add capabilities or applications to a capability map

Update a business capability map

Modify an existing business capability map by adding new capabilities, business applications, or changing the hierarchy of the existing capabilities.

Before you begin

Role required: sn_apm.apm_user

Note: You must have the Owner or Editor access to the artifact or diagram.

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Modeling page by selecting the Enterprise Modeling and Visualization icon ( ).
3. Open an existing capability map artifact from the **Diagrams** page.
   By default, two levels of hierarchy are displayed. Use the down arrow in a capability box to expand and see the next level capabilities.
4. Update the map as required.
   - Move the capabilities from one capability to another capability. Use the **Update hierarchies** button on the Business Portfolio page to refresh the IDs of all the capabilities according to the changes in the committed diagram.
   - To add a new business capability or a business application to the hierarchy map, select the **Add** drop-down menu and then select **Business Capability** or **Business Application**. Drag on the new capability or business application on to a business capability to add the relationship.
   - To apply a color to a capability, select the capability box and select the color that you want to apply from the color pallet.

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All the updates are auto-saved.

5. Select **Commit changes** to synchronize the diagram to the database.
   This option is available only when the diagram is approved. For more information, see Synchronize a shape to the database.
6. Select **Share** to share the diagram with individuals or groups.
   For more information, see Share a modeling diagram.
7. Select the More Actions menu ( ) to perform the following actions:
   - **Save as new version**: Select this option to create a version for the selected diagram. The version number is automatically added in the Version number field, and it isn't editable. For more information, see Save as a version.
   - **Duplicate**: Select this option to duplicate the diagram. For more information, see Duplicate a modeling diagram.
   - **Submit for approval**: Select this option to submit the diagram for approval. The approval process can be done through a configured workflow. By default, the approval request is submitted to the Enterprise Architect group. For more information, see Submit a modeling diagram for approval.

Related topics

Create a diagram for a business capability map

Add capabilities or applications to a capability map

Create diagram for a business hierarchy map

Update a business application hierarchy map

Add capabilities or applications to a capability map

Add a new or existing business capability or business application to the capability map using the Enterprise Modeling and Visualization.

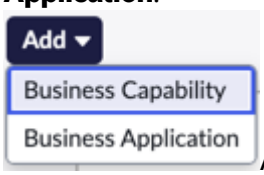
Before you begin

Role required: sn_apm.apm_user

Note: You must have the Owner or Editor access to the artifact or diagram.

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Modeling page by selecting the Modeling icon ( ).
3. Create a new diagram or select an existing diagram from the Diagrams page.
   By default, two levels of capability hierarchy are displayed. Use the down arrow in a capability box to expand and see the next level capabilities and associated business applications.
4. Select the **Add** drop-down menu and then select **Business Capability** or **Business Application**.



A new business capability or business application shape gets added to the canvas.

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5. Select the newly added shape and select the Open the side panel icon ( ) to open the side panel in the canvas.
6. Select and map an existing business capability or business application or create a new one.
   - To map an existing CI, select the **Choose Existing** button and select a CI from the drop-down list.

     Note: For capabilities, only level 0 capabilities are displayed in the list. Capabilities that are already available in the map aren't displayed in the list to select.

   - To create a CI, select the **Create New** button and enter the details.
7. Drag the configuration item (CI) to capability to create a relationship.
   The border of the configuration item (CI) box changes to dotted lines. After you commit the diagram successfully, the border line of the box changes to a solid line.
8. Apply colors to the capabilities as required.
9. Send the diagram for approval.
   After receiving the approval, you can see the **Commit changes** button. Use the **Commit changes** button to synchronize the diagram to the database.
10. Select **Commit changes** to synchronize the diagram to the database.
    This option is available only when the diagram is approved. For more information, see Synchronize a shape to the database.
11. Select **Share** to share the diagram with individuals or groups.
    For more information, see Share a modeling diagram.
12. Select the More Actions menu ( ) to perform the following actions:
    - **Save as new version**: Select this option to create a version for the selected diagram. The version number is automatically added in the Version number field, and it isn't editable.
    - **Duplicate**: Select this option to duplicate the diagram.
    - **Submit for approval**: Select this option to submit the diagram for approval. The approval process can be done through a configured workflow. By default, the approval request is submitted to the Enterprise Architect group.

Related topics

Create a diagram for a business capability map

Update a business capability map

Working with business hierarchy map

Model your business application hierarchy using the Enterprise Modeling and Visualization. Update an existing business hierarchy map by adding more shapes and relationships.

Create diagram for a business hierarchy map

Create and model your business application hierarchy map using the Enterprise Modeling and Visualization.

Before you begin

Role required: sn_apm.apm_user

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Procedure

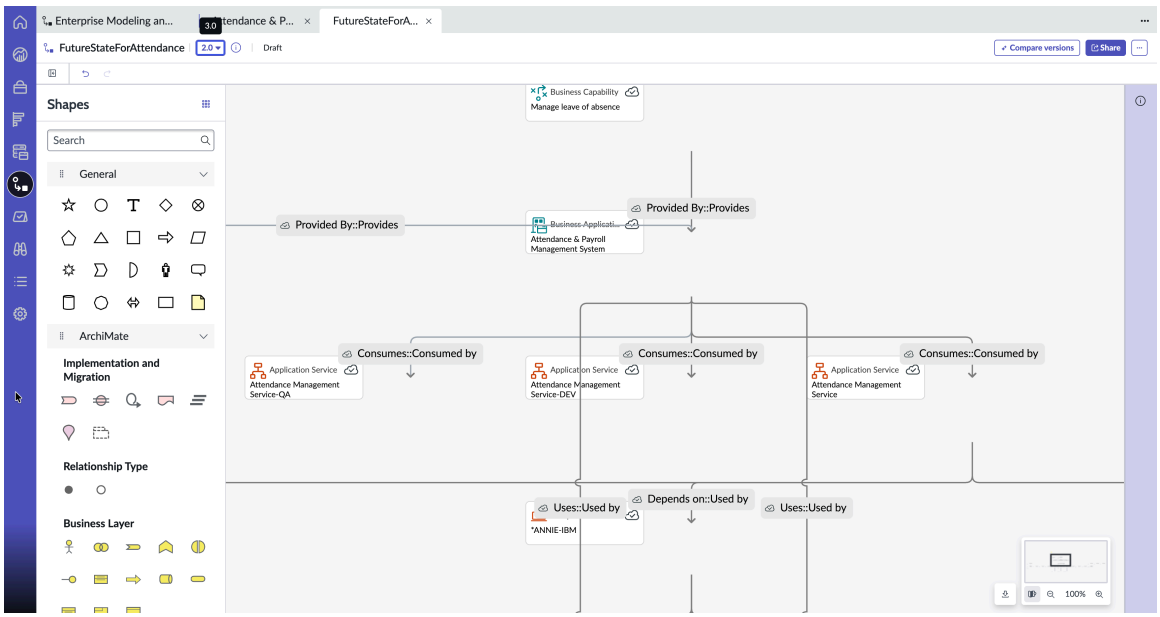
1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Modeling page by selecting the Enterprise Modeling and Visualization icon ( ).
3. Select **New** drop-down menu.
4. Select **Business hierarchy map**.
5. On the Create business hierarchy map form, fill in the details.
   For field information, see Create a business hierarchy map form.
6. Select **Create diagram**.

Result

The business hierarchy map gets created and opened in a new tab.

Note:

You can add a shape to the canvas by either selecting the shape or by dragging the shape from the **Shapes** palette to the canvas.



Related topics

- Update a business application hierarchy map
- Create a diagram for a business capability map

Update a business application hierarchy map

Modify an existing business application hierarchy map by adding or removing shapes and relationships.

Before you begin

Role required: sn_apm.apm_user

Note: You must have the Owner or Editor access to the artifact or diagram.

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Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Modeling page by selecting the Enterprise Modeling and Visualization icon ().
3. Open an existing business hierarchy map artifact from the **Diagrams** page.
4. Select the newly added shape and select the Open the side panel icon (→▯) to open the details panel for the selected shape in the canvas.
5. Select a shape in the diagram to see the following options:
   - Side panel icon (→▯) to update the details of a record.
   - Add related records icon (→▤) to add entities and relationship.
   - More Actions context menu (⋮) to see options for adding relationship or deleting a shape from the canvas.
6. Select **Commit changes** to synchronize the diagram to the database.
   This option is available only when the diagram is approved. For more information, see Synchronize a shape to the database.
7. Select **Share** to share the diagram with individuals or groups.
   For more information, see Share a modeling diagram.
8. Select the More Actions menu () to perform the following actions:
   - **Save as new version**: Select this option to create a version for the selected diagram. The version number is automatically added in the Version number field, and it isn't editable. For more information, see Save as a version.
   - **Duplicate**: Select this option to duplicate the diagram. For more information, see Duplicate a modeling diagram.
   - **Submit for approval**: Select this option to submit the diagram for approval. The approval process can be done through a configured workflow. By default, the approval request is submitted to the Enterprise Architect group. For more information, see Submit a modeling diagram for approval.

Related topics

Create a diagram for a business capability map

Update a business capability map

Add capabilities or applications to a capability map

Create diagram for a business hierarchy map

Working with business process map

Use the Enterprise Modeling and Visualization to create, update, and manage business process diagrams that represent the current and future state of your business workflows.

Working with business process diagrams in Enterprise Modeling and Visualization. A Business Process Model and Notation (BPMN) diagram is a visual representation of a structured sequence of tasks aimed at achieving specific outcomes. Use it to establish a shared, visual understanding of processes: who is involved, what actions are taken, and where decisions are made.

The **Shapes** palette provides a full BPMN 2.0 shape library organized into four sub-categories:

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- **General**: Structural shapes including pools, lanes, and data artifacts.
- **Event**: Shapes covering start, intermediate, end, and boundary events with all standard trigger types.
- **Activity**: Task shapes (including user task, service task, manual task, script task, business rule task, send task, and receive task), call activities, sub-processes, and marker shapes.
- **Gateway**: Gateway shapes for controlling process flow, including exclusive, inclusive, parallel, event-based, and complex gateways.

When you drag a shape from the **Shapes** palette to the canvas, the shape icon you drag matches the shape's appearance on the canvas. Hovering over a shape in the palette shows a preview before you place it.

You can perform the following actions when working with a business process map:

- Create business process map and associate it with a new or existing business process record.
- Add BPMN shapes to the canvas and connect them with relationship lines. Change the line type using the drop-down that appears directly on the connector.
- Replace a shape on the canvas with a different shape while retaining the original shape's label and connections.
- Update the properties of a shape by opening the side panel for the associated record.
- Modify diagram-level details such as the name and description of the business process.
- Save versions, share, duplicate, and submit diagrams for approval.
- Commit approved diagrams to synchronize changes to the database.

Note: Canvas controls, including shape context menus and the modify business process details icon, are accessible via keyboard. Use the **Tab** key to navigate to shapes and their controls without a mouse.

Note:

To keep connector ports visible on shapes at all times without hovering, enable the **Show all buttons without the need to hover** preference in **Preferences** > **Accessibility**. For more information, see Show shape controls without hovering.

Related topics

Business process map diagrams from images

Create a business process map diagram from an image

Review an AI-generated business process map diagram

Create a business process map diagram from an image

Upload an image of an existing process diagram to generate a new, editable business process map diagram in EA Workspace using the ServiceNow AI Lens ServiceNow Otto® skill.

Before you begin

Note: Depending on your license, you will have access to certain application features, generative AI skills, agentic workflows, and AI agents. For more information, see ServiceNow product tiers.

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Important: This generative AI skill is turned on by default. The skill will be automatically available to appropriate role users for the application. For more information, see AI agents, skills, and agentic workflows on by default.

The default AI model provider for this skill is Azure OpenAI.

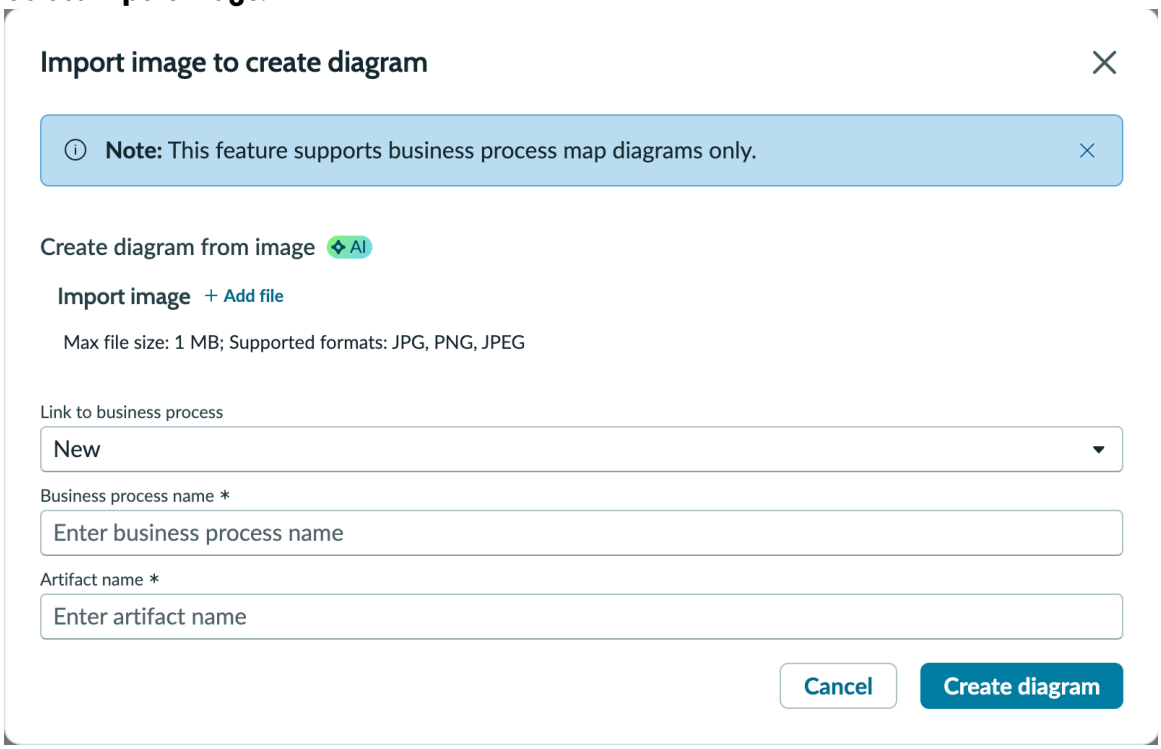
Starting with the September 2026 release, Gemma 4 joins our growing portfolio of open-weight models available through Now LLM Service. The latest industry advancements are available alongside sovereignty-focused options. All models are hosted and governed by ServiceNow with the same infrastructure and data protections. Older models will remain available for existing published AI skills, agents, and agentic workflows, but will no longer be available for new development or configuration. For details, see the KB3066214: ServiceNow Otto Model Upgrades article in the Now Support Knowledge Base.

Verify the following conditions are met:

- The source image is in PNG or JPEG format and does not exceed 1 MB.
- Role required: sn_apm.apm_user

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Modeling page by selecting the Enterprise Modeling and Visualization icon ( ).
3. Select **Import image**.



4. In the *Import image to create diagram* pop-up window, under **Create diagram from image**, select **Add file** and select your source image file.
   Max file size: 1 MB; Supported formats: PNG and JPEG.
5. From the **Link to business process** drop-down, select **New** to create business process, or select an existing business process.
6. Enter values for **Business process name** and **Artifact name**.

Note: The artifact name is automatically populated from the **Business process name**.

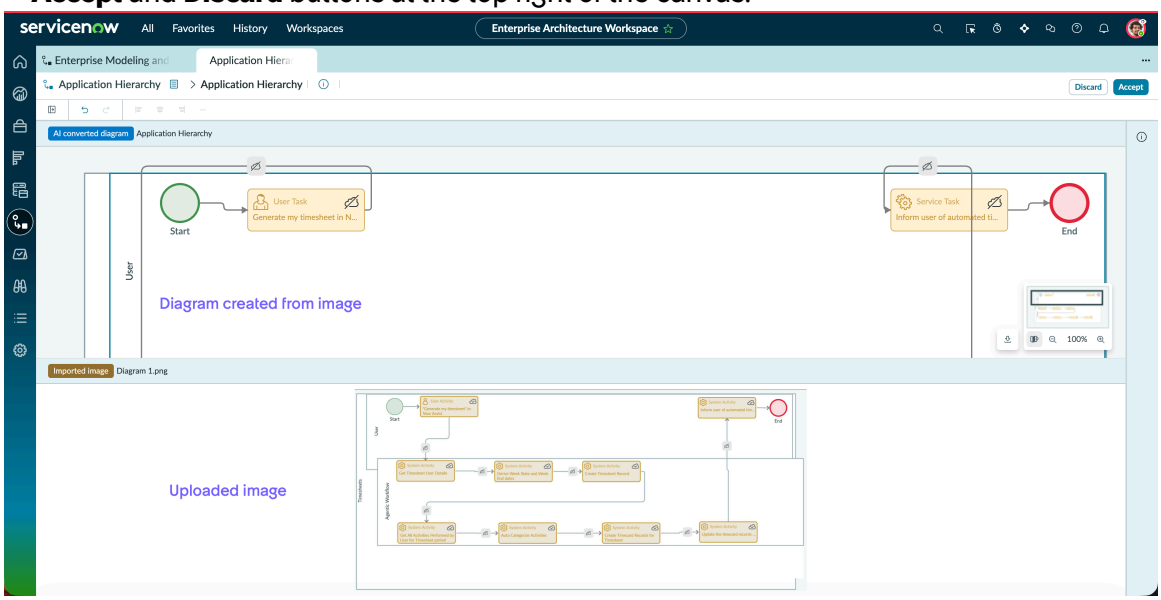
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7. Select **Create diagram**.

   An *Importing image* dialog appears. If the request fails or times out, an error message is displayed inside this dialog and you can retry. On success, the diagram canvas opens.

   The canvas opens showing:

   - The generated diagram in the upper pane with shapes, pools, lanes, and connections identified from the image.
   - The uploaded source image in the lower pane for reference. To resize the panes, drag the divider between them.
   - An **AI converted diagram** badge in the canvas header.
   - A **Shapes with low confidence scores** list in the canvas banner, if any shapes were identified with a confidence score below 70%. Affected shapes are marked with an orange border on the canvas.
   - **Accept** and **Discard** buttons at the top right of the canvas.



Note: The **Share** button, **Show Version**, and the more actions menu are hidden while the diagram is in review state.

What to do next

Review and accept the generated diagram. For instructions, see Review an AI-generated business process map diagram.

Related topics

- Business process map diagrams from images
- Review an AI-generated business process map diagram
- ServiceNow AI Lens
- Configure ServiceNow AI Lens
- Replace a shape in a diagram
- Exploring ServiceNow Otto for Enterprise Architecture (EA)
- Configure ServiceNow Otto for Enterprise Architecture (EA)
- ServiceNow Otto for Enterprise Architecture (EA) access roles

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Review an AI-generated business process map diagram

After ServiceNow AI lens generates a business process map (BPM) diagram from an uploaded image, review the diagram and resolve any low-confidence shapes, and accept or discard it.

Before you begin

Note: Depending on your license, you will have access to certain application features, generative AI skills, agentic workflows, and AI agents. For more information, see ServiceNow product tiers.

Important: This generative AI skill is turned on by default. The skill will be automatically available to appropriate role users for the application. For more information, see AI agents, skills, and agentic workflows on by default.

Before you begin

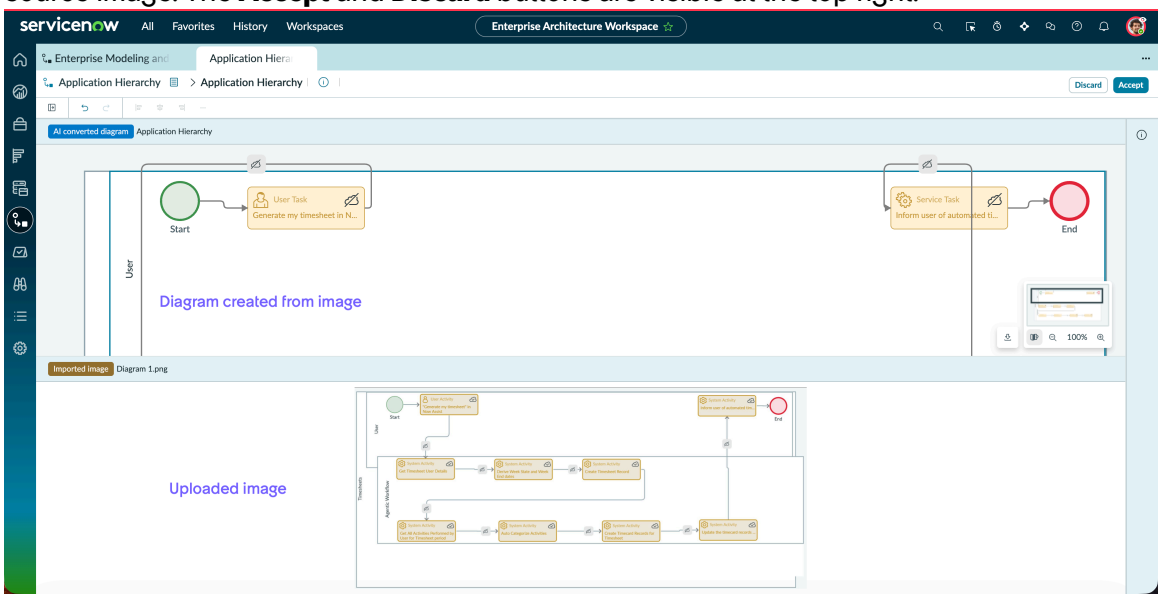
An AI-generated business process map diagram exists in review state. For instructions on creating a diagram from an image, see Create a business process map diagram from an image.

The default AI model provider for this skill is Azure OpenAI.

Role required: sn_apm.apm_user

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Modeling page by selecting the Enterprise Modeling and Visualization icon ( ).
3. Open the BPM diagram that is in review state.
   The canvas header displays an **AI converted diagram** badge. The upper pane shows the generated diagram and the lower pane shows the uploaded source image. The **Accept** and **Discard** buttons are visible at the top right.



Note: The **Share** button, **Show Version**, and the more actions menu are hidden until the diagram is accepted.

4. Verify that shapes, pools, lanes, and connections are correctly identified by comparing the generated diagram in the upper pane against the source image in the lower pane.

   Check the following:

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- Node accuracy: Confirm shape types and names match the source image. AI Lens extracts names from the image text.
- Events, gateways, and activities: Confirm that event, gateway, and activity shapes from the image are correctly represented with the corresponding shape types in the diagram.
- Edge accuracy: Confirm connections between shapes are correctly placed and that any labels on those connections are correctly captured.
- Pools and lanes: Confirm the number of pools and lanes in the diagram matches the source image.
- Grouping: Confirm shapes that were grouped in the source image are also grouped on the canvas. You can resize pools and lanes by dragging their borders.
- Generic rectangles: Shapes that AI Lens could not match to a known type in the shape library appear as generic rectangles. Identify the intended shape type and replace them using the **Shape Type** drop-down in the **Data** panel.

5. To replace a shape with a different type, select the shape on the canvas and then select the open the side panel icon (→▯).
   The **Data** panel is diplayed.
6. In the **Shape Type** field, open the drop-down and select the correct shape type from the list. The shape updates to the selected type. All existing connections to the shape and their labels are retained.
7. To update the record a shape is linked to without changing its shape type, perform the following: select the shape to open its **Data** panel, then use **Choose Existing** to link it to a different existing record, or **Create new** to stage a new record.

   a. Select the shape on the canvas and then select the open the side panel icon (→▯).

   b. Select **Choose Existing** to link it to a different existing record.

   c. Select **Create new** to link to an existing record.
   This allows you to correct entity links independently of shape types.
8. If the **Shapes with low confidence scores** drop-down is visible in the canvas banner, select it to view the list of shapes identified with a low confidence score.

   Affected shapes are marked with an orange border on the canvas. Select each affected shape to open its **Data** panel, then take one of the following actions:

   - Change the **Shape Type** in the **Data** panel to the correct type. The orange border is removed and the low-confidence count in the banner disappears.
   - Select **Accept** to accept all AI-generated shapes as-is and clear all low-confidence indicators at once.
9. Verify entity sync for shapes that represent records, by selecting each shape and checking the **Data** panel.
   - **Choose Existing**: AI Lens found a matching record in the corresponding database table and linked the shape to it automatically.
   - **Create new**: No matching record was found. A temporary record is staged for the shape. The record will be committed following the standard approval workflow for that table if you have the appropriate permissions.

   Note: Users without access to create records in a given database table will not have new records committed for the corresponding shapes, even after accepting the diagram.

10. When satisfied with the diagram, take one of the following actions:

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- To accept the diagram, select **Accept** at the top right of the canvas.

  The diagram transitions to draft state and the reference image pane closes. New records staged during diagram generation are committed following the standard approval workflow for the respective tables.

- To permanently delete the diagram, select **Discard** at the top right of the canvas. On the *Discard Review* dialog box, select **Discard** to confirm.

  Important: Discarding an AI-generated diagram deletes the diagram, all associated versions, the artifact, and the uploaded image. You're returned to the diagrams list view. This action can't be undone.

What to do next

After accepting, the diagram is in draft state and behaves as any other diagram in EA Workspace. The **Share** button, **Show Version**, and the more actions menu are restored. You can share the diagram with other users, associate it with an architectural artifact, and continue editing it as needed.

Related topics

- Business process map diagrams from images
- Create a business process map diagram from an image
- ServiceNow AI Lens
- Configure ServiceNow AI Lens
- Exploring ServiceNow Otto for Enterprise Architecture (EA)
- Configure ServiceNow Otto for Enterprise Architecture (EA)
- ServiceNow Otto for Enterprise Architecture (EA) access roles

Create a diagram for a business process map

Create business process diagrams and model the future state of the business processes using the Enterprise Modeling and Visualization.

Before you begin

Role required: sn_apm.apm_user

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Modeling page by selecting the Enterprise Modeling and Visualization icon ( ).
3. Select the **New** drop-down menu.
4. Select **Business process map**.
5. On the Create a business process map form, fill in the details.
   For field information, see Create a business process map form.
6. Select **Create diagram**.

Result

The business process map gets created and opened in a new tab.

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Note:

You can add a shape to the canvas by either selecting the shape or by dragging the shape from the **Shapes** palette to the canvas.

BPMN shapes are organized into sub-categories in the palette: **General**, **Event**, **Activity**, and **Gateway**. Expand a sub-category to browse its shapes.

When you drag a shape from the palette to the canvas, the shape displays its actual icon as you drag it. To preview a shape before placing it, hover over it in the palette. All BPMN shapes are compatible with both light and dark diagram themes.

Related topics

Update a business process map

Business Process Modeling Notation (BPMN) shapes

Business process modeling

Update a business process map

Modify an existing business process map by adding new events, activities, or gateways.

Before you begin
Role required: sn_apm.apm_user

Note: To update a diagram, you must have the Owner or Editor access to the artifact or diagram.

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Modeling page by selecting the Enterprise Modeling and Visualization icon ( ).
3. Open an existing business process map from the Diagrams page.
4. Add the required shapes and connections.

   Drag shapes from the **Shapes** palette to the canvas. BPMN shapes are organized into sub-categories — **Gateway**, **Event**, **Activity**, and **General**. For a full list of available shapes, see Business Process Modeling Notation (BPMN) shapes.

   For activity shapes such as user task or service task, select the Open the side panel icon ( ) to update the details of the associated record.

   To change the style of a connector, select the relationship line and choose a line type from the drop-down that appears directly on the line. BPMN shapes and general shapes have their own sets of line types.

5. **Optional:** To swap a shape with a different one, select the shape and use the **Shape type** option in the right panel.
   The replacement shape retains the original shape's label and connectors.
6. Select the More Actions context menu (⋮) to see options for deleting a shape from the canvas.
7. Select **Share** to share the diagram with individuals or groups.
   For more information, see Share a modeling diagram.
8. Select the More Actions menu ( ) to perform the following actions:

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- **Save as new version**: Select this option to create a version for the selected diagram. The version number is automatically added in the Version number field, and it isn't editable. For more information, see Save as a version.
- **Duplicate**: Select this option to duplicate the diagram. For more information, see Duplicate a modeling diagram.
- **Submit for approval**: Select this option to submit the diagram for approval. The approval process can be done through a configured workflow. By default, the approval request is submitted to the Enterprise Architect group. For more information, see Submit a modeling diagram for approval.

9. Select **Commit changes** to synchronize the diagram to the database.
   This option is available only when the diagram is approved. For more information, see Synchronize a shape to the database.

Related topics

Create a diagram for a business process map

View all shape libraries

Business Process Modeling Notation (BPMN) shapes

Business process modeling

Modify BPMN diagram details

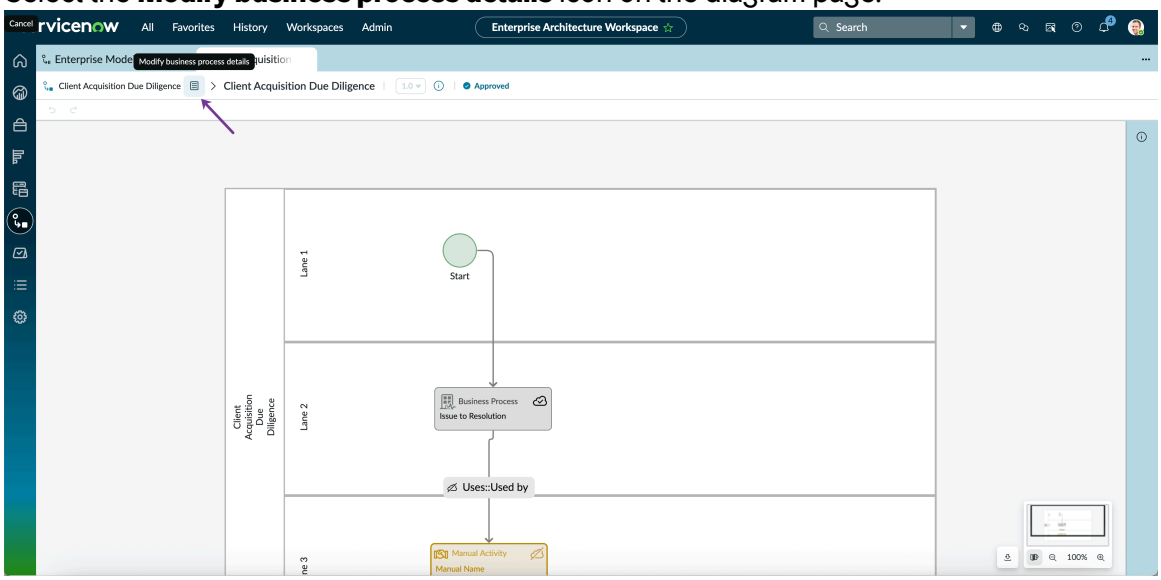
Edit the properties of a BPMN (Business Process Model and Notation) diagram element directly from the diagram page. It enables quick updates without leaving the modeling interface.

Before you begin

Role required: sn_apm.apm_user

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Modeling page by selecting the Modeling icon ( ).
3. Open an existing BPMN diagram.
4. Select the **Modify business process details** icon on the diagram page.

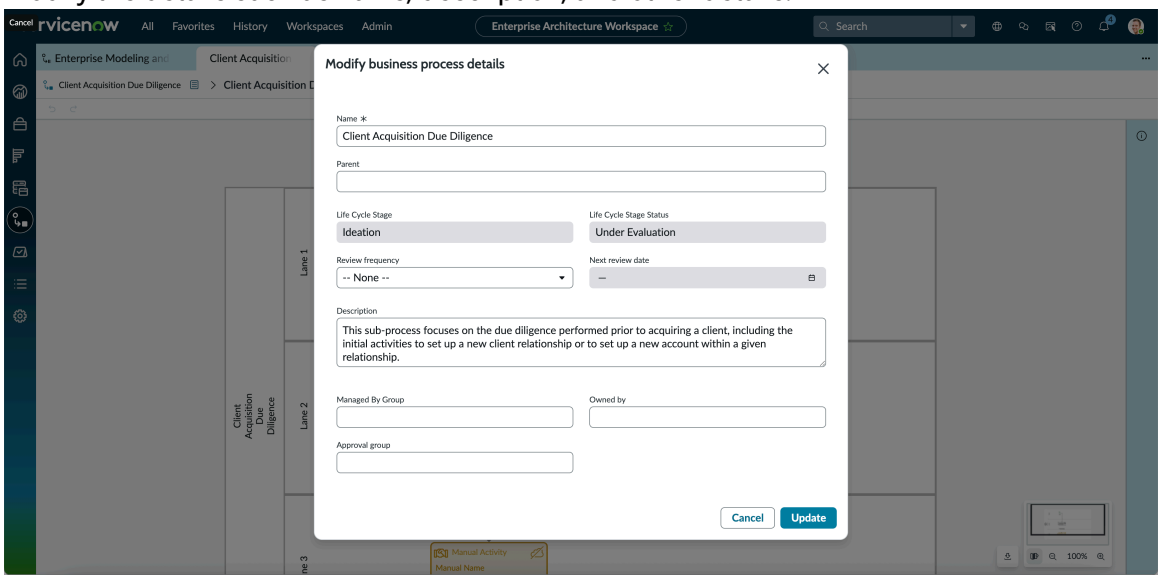


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Note:

To access the **Modify business process details** icon using a keyboard, navigate to the diagram using the **Tab** key. Canvas controls are accessible without a mouse.

5. Modify the details such as name, description, and other details.



6. Select **Update**.

Working with ArchiMate Shapes

Use ArchiMate® shapes to build enterprise architecture diagrams that represent the relationships between business, application, and technology domains across your organization.

ArchiMate® is an open, independent enterprise architecture modeling language standardized by The Open Group. In the Enterprise Modeling and Visualization, ArchiMate® shapes let you model the current and target state of your enterprise using a consistent, industry-standard notation.

ArchiMate® shapes are organized into the following categories in the **Shapes** palette:

- **Implementation and Migration**: Shapes for modeling transition states, work packages, deliverables, gaps, and plateaus.
- **Relationship Type**: Junction shapes (And Junction and Or Junction) for modeling branching and merging relationships.
- **Business Layer**: Shapes for actors, roles, processes, functions, services, and other business-layer elements.
- **Application Layer**: Shapes for application components, services, functions, interfaces, and data objects.
- **Motivation**: Shapes for goals, requirements, drivers, principles, stakeholders, and other motivational elements.
- **Physical**: Shapes for equipment, facilities, and materials.
- **Strategy**: Shapes for capabilities, courses of action, resources, and value streams.
- **Technology**: Shapes for nodes, devices, system software, technology services, functions, and interfaces.

When you connect two ArchiMate® shapes, a toolbar appears on the connector. Use the **Relationship type** drop-down in the toolbar to set the ArchiMate® 3.2 relationship type — for

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example, Access, Assignment, Influence, or Serving. For the full list of relationship types and their visual styles, see Shape connector properties in Enterprise Modeling and Visualization.

Connector ports on ArchiMate® shapes are bi-directional. You can use any connector port — top, bottom, left, or right — as either an input or an output when connecting shapes.

Tip:

To keep connector ports permanently visible on all shapes without hovering, enable the **Show all buttons without the need to hover** preference in **Preferences** > **Accessibility**. For more information, see Show shape controls without hovering.

Related topics

ArchiMate shapes

Shape connector properties in Enterprise Modeling and Visualization

Create diagram using ArchiMate shapes and add relationships

Show shape controls without hovering

Create diagram using ArchiMate shapes and add relationships

Use the industry standard ArchiMate shapes to create modeling diagrams for your enterprise in the Enterprise Architecture Workspace.

Before you begin

Role required: sn_apm.apm_user

About this task

You can create a diagram with the combination of CSDM and ArchiMate shapes or you can use only the ArchiMate shapes. To create the diagram with only ArchiMate shapes, skip including the Business Application name in the Create a business hierarchy map form. This creates an empty canvas.

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Modeling page by selecting the Enterprise Modeling and Visualization icon ( ).
3. Select **New** drop-down menu.
4. Select **Business hierarchy map**.
5. On the Create a business capability map form, fill in the details.
   For field information, see Create a business hierarchy map form.
6. Select **Create diagram**.
   A empty canvas gets created for the artifact.
7. Add ArchiMate shapes to the canvas.

   Note:

   You can add a shape to the canvas by either selecting the shape or by dragging the shape from the **Shapes** palette to the canvas.

8. Associate a CI to the shape by selecting a radio button.
   - **Choose existing**- Select this radio button to associate the shape with an existing CI.
   - **Create new**- Select this radio button to create a new CI for the selected shape.

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9. Select a connector line to update the relationship type.
   The Relationship side panel opens. Select a **Relationship** and **Value**. For information on the ArchiMate shapes and relationships, see ArchiMate shapes support in the Enterprise Modeling and Visualization.

   Note: Connector ports on ArchiMate shapes are bi-directional. You can use any connector port—top, bottom, left, or right—as either an input or an output.

10. Select a shape and add related records for the shape by selecting the icon.
    Th Add related records window opens. It lists the Entities with the number and Relationship type (CI relationship or a Reference).
11. Select the **Entities** that you want to include and then select **Add**.
    The selected entities are added to the diagram with the relationship showing in ArchiMate format. In the diagram, the dotted lines represent the Reference links and the solid lines represent the CI relationships.
12. Select **Commit changes** to synchronize the diagram to the database.
    This option is available only when the diagram is approved. For more information, see Synchronize a shape to the database.
13. Select **Share** to share the diagram with individuals or groups.
    For more information, see Share a modeling diagram.
14. Select the More Actions menu ( ) to perform the following actions:
    - **Save as new version**: Select this option to create a version for the selected diagram. The version number is automatically added in the Version number field, and it isn't editable. For more information, see Save as a version.
    - **Duplicate**: Select this option to duplicate the diagram. For more information, see Duplicate a modeling diagram.
    - **Submit for approval**: Select this option to submit the diagram for approval. The approval process can be done through a configured workflow. By default, the approval request is submitted to the Enterprise Architect group. For more information, see Submit a modeling diagram for approval.

Related topics

ArchiMate shapes support in the Enterprise Modeling and Visualization

ArchiMate shapes

Working with Amazon Web Services (AWS) shapes

AWS is a cloud computing platform, used for cloud migration, application hosting, and digital transformation, making it critical for enterprise architecture planning. AWS shapes are part of the Cloud Architecture modeling capability. They enable architects to visualize AWS cloud components, model hybrid architectures, and support cloud migration planning and future-state architecture design.

Create a diagram using AWS shapes

Use the AWS shapes within the Cloud Architecture modeling capability of the Enterprise Architecture Workspace to visualize AWS cloud components. These shapes also enable architects to design hybrid architectures and support cloud migration planning.

Before you begin
Role required: sn_apm.apm_user

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Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Modeling page by selecting the Enterprise Modeling and Visualization icon ().
3. Select **New** drop-down menu.
4. Select **Blank diagram**.
5. On the Blank diagram modal, enter a name for the artifact.
   You can optionally choose an architectural category for the diagram.
6. Select **Create diagram**.
   An empty canvas gets created for the artifact.
7. From the Shapes panel, add AWS shapes to the canvas.

   Note:

   You can add a shape to the canvas by either selecting the shape or by dragging the shape from the **Shapes** palette to the canvas.

8. Select a shape on the canvas and associate it with CMDB records.
   - **Choose existing**- Select this radio button to associate the shape with an existing CMDB record.
   - **Create new**- Select this radio button to create a CMDB record directly from the diagram.
9. Define a relationship by selecting connector lines.
   The Relationship side panel opens. Select a **Relationship** and **Value**.

   Note: Connector ports on AWS shapes, including AWS Group shapes, are bi-directional. You can use any connector port—top, bottom, left, or right—as either an input or an output.

10. Select a shape and add related records for the shape by selecting the  icon.
    The **Add related records** icon appears only when the shape is linked to an existing CMDB record. When you select the icon, the **Add related records** window opens. This window displays the entities along with their names and relationship types (CI relationship, M2M, or Reference).
11. Select the **Entities** that you want to include and then select **Add**.
    The selected entities are added to the diagram with the relationship showing in AWS format. In the diagram, the dotted lines represent the reference links and the solid lines represent the CI relationships.
12. Select **Commit changes** to synchronize the diagram to the database.
    This option is available only when the diagram is approved. For more information, see Synchronize a shape to the database.
13. Select **Share** to share the diagram with individuals or groups.
    For more information, see Share a modeling diagram.
14. Select the More Actions menu () to perform the following actions:
    - **Save as new version**: Select this option to create a version for the selected diagram. The version number is automatically added in the Version number field, and it isn't editable. For more information, see Save as a version.
    - **Duplicate**: Select this option to duplicate the diagram. For more information, see Duplicate a modeling diagram.

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- **Submit for approval**: Select this option to submit the diagram for approval. The approval process can be done through a configured workflow. By default, the approval request is submitted to the Enterprise Architect group. For more information, see Submit a modeling diagram for approval.

Related topics

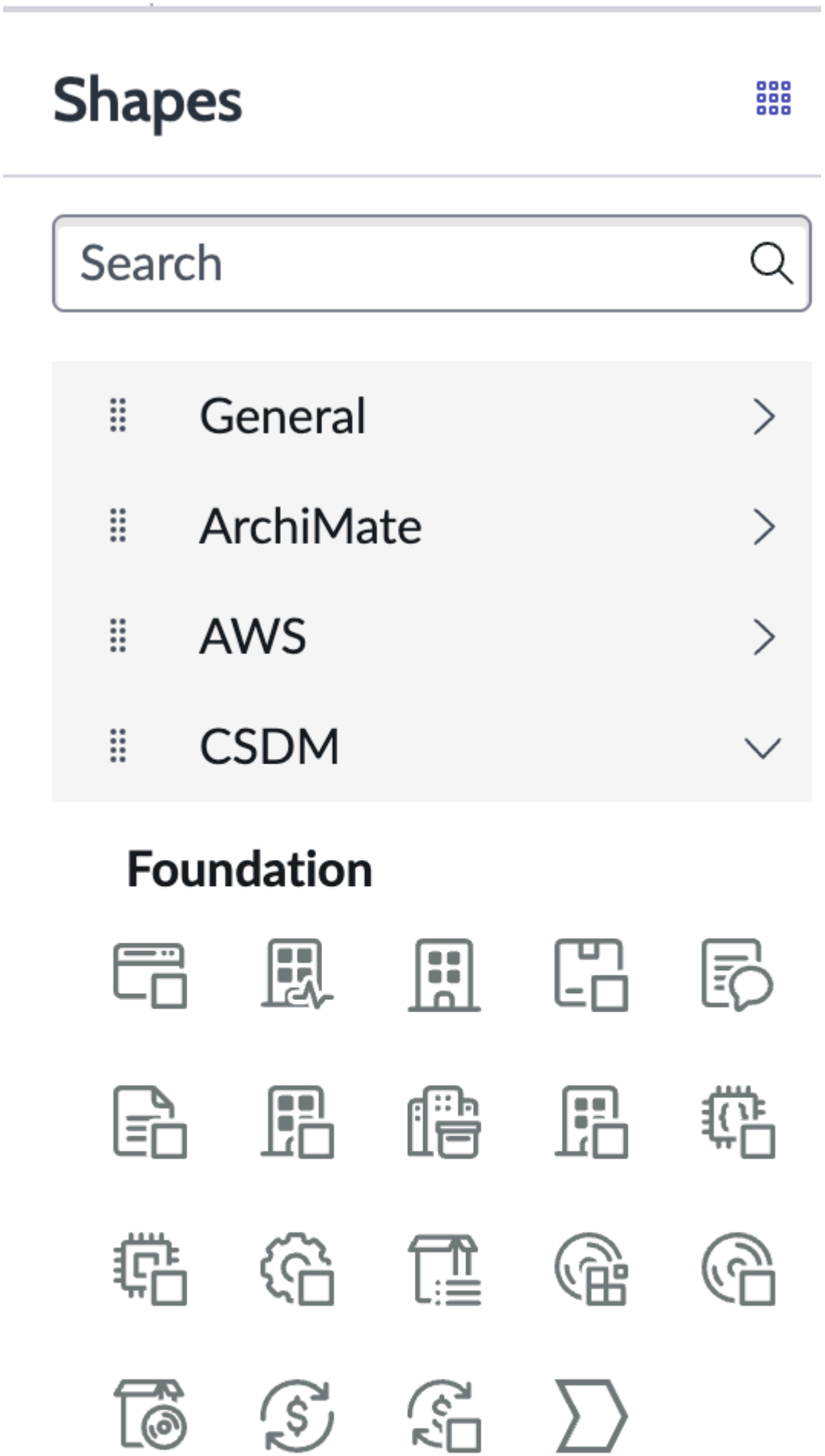
AWS shapes support in the Enterprise Modeling and Visualization

Working with Amazon Web Services (AWS) shapes

Working with CSDM shapes

Common Service Data Model (CSDM) is a standardized framework and CMDB data model provided by ServiceNow. It defines service-related terms, tables, and relationships across the Now Platform to ensure consistency in how services, applications, and infrastructure are represented. In Enterprise Architecture Workspace, CSDM shapes are visual elements that represent entities on diagrams for modeling and analysis.

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Create a diagram using CSDM shapes

The CSDM shapes represent objects visually in diagrams, enabling architects to model business capabilities, applications, services, and technical components in alignment with the Now Platform.

Before you begin

Role required: sn_apm.apm_user

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Modeling page by selecting the Enterprise Modeling and Visualization icon ( ).
3. Select the **New** drop-down menu.
4. Select **Blank diagram**.
5. On the Blank diagram modal, enter a name for the artifact.
   You can optionally choose an architectural category for the diagram.
6. Select **Create diagram**.
   An empty canvas gets created for the artifact.
7. From the Shapes panel, add CSDM shapes to the canvas.

   Note:

   You can add a shape to the canvas by either selecting the shape or by dragging the shape from the **Shapes** palette to the canvas.

8. Select a shape on the canvas, and associate it with CMDB records.
   - **Choose existing**- Select this radio button to associate the shape with an existing CMDB record.
   - **Create new**- Select this radio button to create a CMDB record directly from the diagram.
9. Define the relationship by selecting connector lines.
   The Relationship side panel opens. Select a **Relationship** and **Value**. For more information on the CSDM shapes and relationships, see CSDM shapes support in the Enterprise Modeling and Visualization.

   Note: Connector ports on CSDM shapes are bi-directional. You can use any connector port—top, bottom, left, or right—as either an input or an output.

10. Select a shape and add related records for the shape by selecting the icon.
    The **Add related records** icon appears only when the shape is linked to an existing CMDB record. When you select the icon, the **Add related records** window opens. This window displays the entities along with their names and relationship types (CI relationship, M2M, or Reference).
11. Select the **Entities** that you want to include and then select **Add**.
    The selected entities are added to the diagram with the relationship showing in CSDM format. In the diagram, the dotted lines represent the reference links and the solid lines represent the CI relationships.
12. Select **Commit changes** to synchronize the diagram to the database.
    This option is available only when the diagram is approved. For more information, see Synchronize a shape to the database.
13. Select **Share** to share the diagram with individuals or groups.

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For more information, see Share a modeling diagram.

14. Select the More Actions menu ( ) to perform the following actions:
    - **Save as new version**: Select this option to create a version for the selected diagram. The version number is automatically added in the Version number field, and it isn't editable. For more information, see Save as a version.
    - **Duplicate**: Select this option to duplicate the diagram. For more information, see Duplicate a modeling diagram.
    - **Submit for approval**: Select this option to submit the diagram for approval. The approval process can be done through a configured workflow. By default, the approval request is submitted to the Enterprise Architect group. For more information, see Submit a modeling diagram for approval.

Working with custom shapes

Custom shapes represent specific elements that are unique to your organization. Manage custom shapes, create diagram actions for the shapes in the Enterprise Architecture Workspace.

Storing shapes or images to the database

Upload the images to the database to configure them to show up in the diagrams page of the Enterprise Modeling and Visualization.

Before you begin
Role required: System administrator

About this task
Every shape in Enterprise Modeling and Visualization is associated with an image to represent the shape. Users with System administrators role can upload and store images in the database. These images are saved in the Images [db_image] table.

Procedure
1. Navigate to **All** > **System UI** > **Images**.
2. Select **New**
3. Fill in the details in the new image form.
   For more details, see Image form.

Related topics
Create a diagram action for a custom shape

Add a custom shape library

Add a shape library element for a custom shape

Custom shapes example

Create a diagram action for a custom shape

Create diagram actions for newly added custom shapes that can be used in#Enterprise Modeling and Visualization to create diagrams.

Before you begin
Role required: sn_apm.apm_admin

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About this task

After creating custom shapes and adding them to the shape library, you can define actions to associate with each shape. Diagram actions enhance the user experience by making diagrams more interactive and functional.

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Setup page by selecting the Setup icon ( ).
3. Select the expand row icon ( ) next to *Enterprise Modeling and Visualization*.
4. Select **Diagram Actions**.
5. Select **New**.
6. On the Diagram Action form, fill in the fields.

   For field information, see Create diagram action form.
7. Select **Save**.

Related topics

- Custom shapes example
- Add a shape library element for a custom shape
- Add a custom shape library
- Storing shapes or images to the database

Add a custom shape library

Create a shape library to add custom shapes that are unique to your organization.

Before you begin

Role required: sn_apm.apm_admin

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Setup page by selecting the Setup icon ( ).
3. Select the expand row icon ( ) next to *Enterprise Modeling and Visualization*.
4. Select **Shape Libraries**.
5. Select **New**.
6. On the Shape Library form, fill in the fields.

   For field information, see Shape library form.
7. Select **Save**.

Related topics

- Storing shapes or images to the database
- Create a diagram action for a custom shape

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Add a shape library element for a custom shape

Custom shapes example

Add a shape library element for a custom shape

Create a shape library element to associate a custom shape and its diagram action to the custom shape library.

Before you begin
Role required: sn_apm.apm_admin

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Setup page by selecting the Setup icon ( ).
3. Select the expand row icon ( ) next to *Enterprise Modeling and Visualization*.
4. Select **Shape Libraries**.
5. Open the custom shape library for which you want to associate a custom shape and its diagram action.
6. Select the Shape Library Elements tab.
7. Select **New**.
8. On the Shape Library Element form, fill in the fields.

   For field information, see Shape library element form.
9. Select **Save**.

Related topics

Custom shapes example

Add a custom shape library

Create a diagram action for a custom shape

Storing shapes or images to the database

Custom shapes example

Use custom shapes to represent specific elements that are unique to your organization, such as custom business processes, systems, or roles.

Before you begin
Role required: System Administrator (to upload images to the database), APM admin (to create diagram actions, custom shape library, add shape library element).

About this task
In this example, you will learn how to upload an image or shape to the database and create a diagram action for it. You will also create a custom shape library, add the shape to the shape library, and create a shape library element. Finally, you will create a diagram using the shapes.

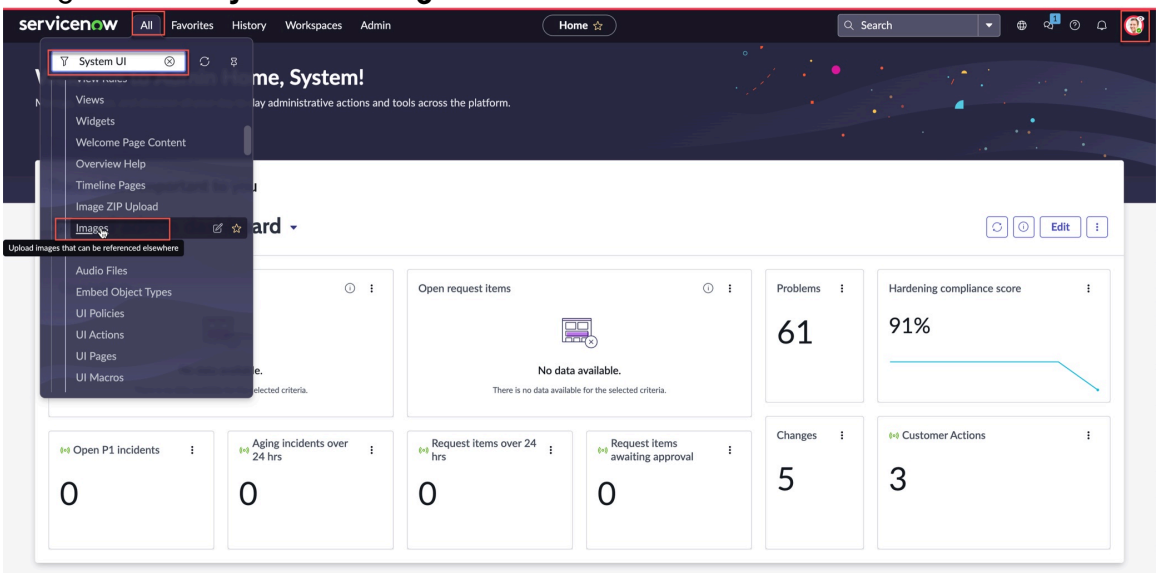
Create the shapes that represent the elements you want to include in your diagrams. Ensure the images are clear, simple, and visually distinct. The compatible format is .SVG. In this example, we use the ‘Database.svg’ image.

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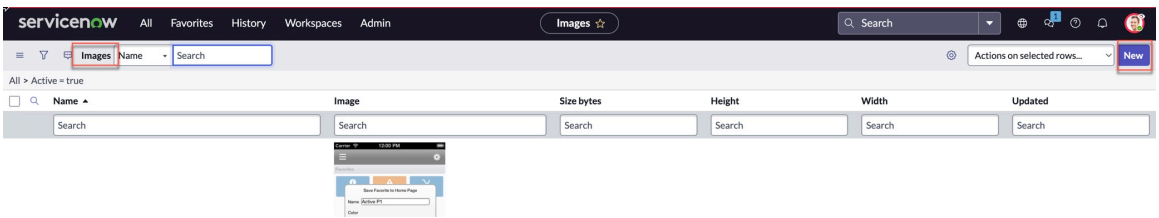
Procedure

1. Upload the image or shape to the database.

   a. Navigate to **All** > **System UI** > **Images**.

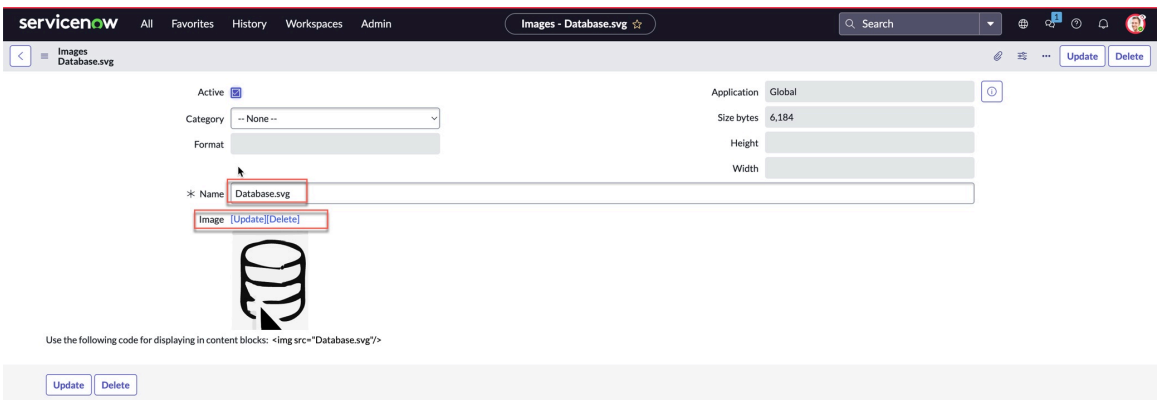


   b. Select **New**.



2. In the New image record, enter the name of the image file (include file format extension) and fill in other details.

3. Select **Click to add...**.

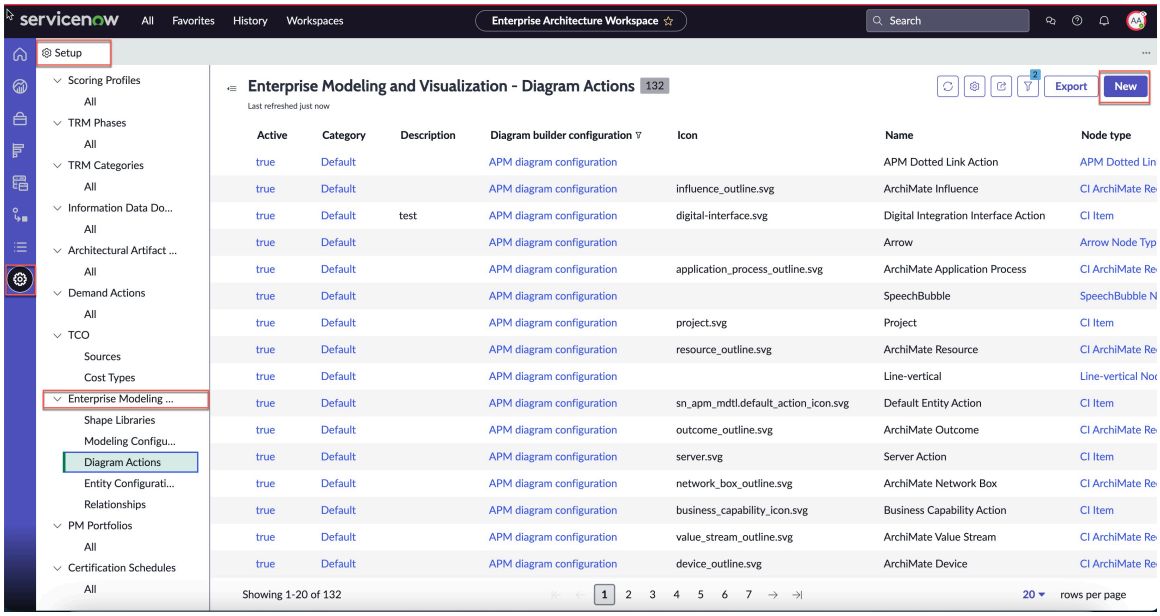


4. Create a diagram action for the image in the Enterprise Architecture Workspace.

   a. Log in as an APM admin user (sn_apm.apm_admin), navigate to the **Setup** section.

   b. Under the **Enterprise Modeling and Visualization** section, select **Diagram Actions**.

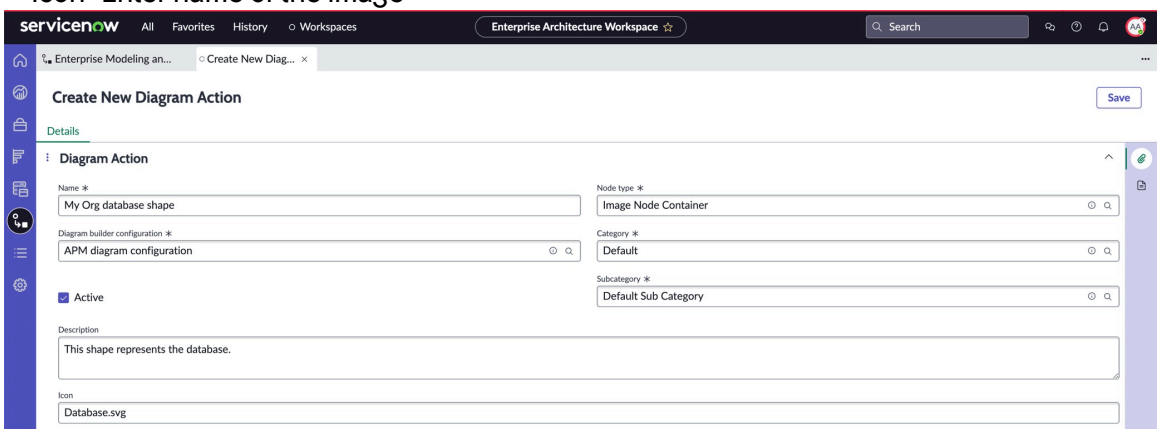
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c. Select New to create a diagram action for the image (Database.svg).

d. In the Diagram Action form, enter the following details:

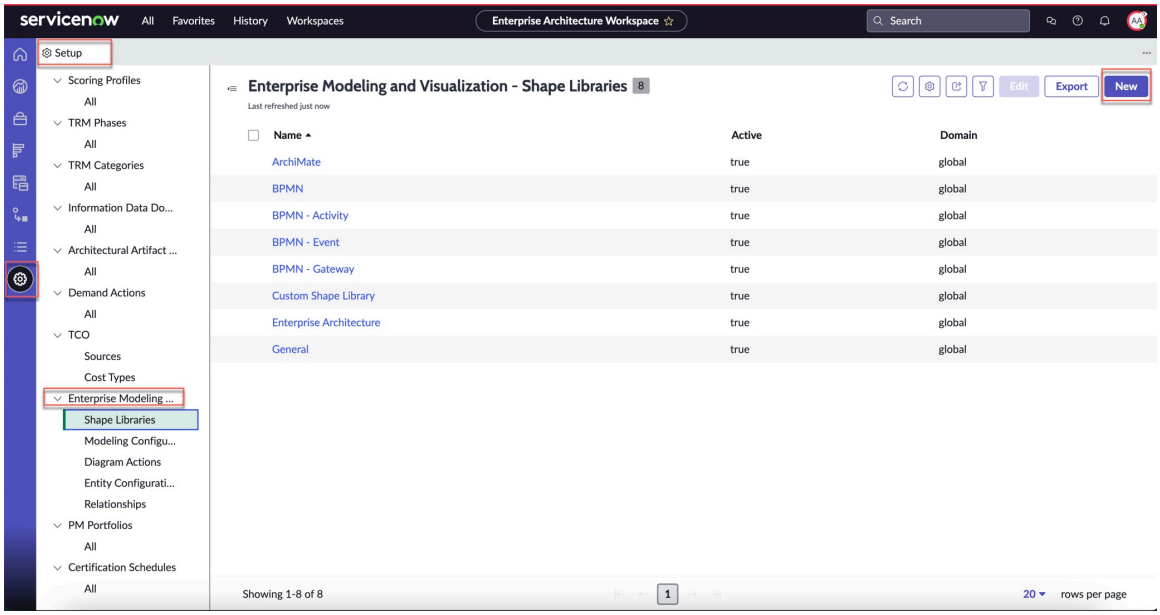
- Name- Name for the diagram action
- Diagram builder configuration- Select APM diagram configuration from the list
- Node type- Select node type as 'Image node container'
- Category- Select Default
- Sub category- Select Default sub category
- Icon- Enter name of the image



5. Create a custom shape library specific to your Org to add all the shapes to create diagrams for your organization.

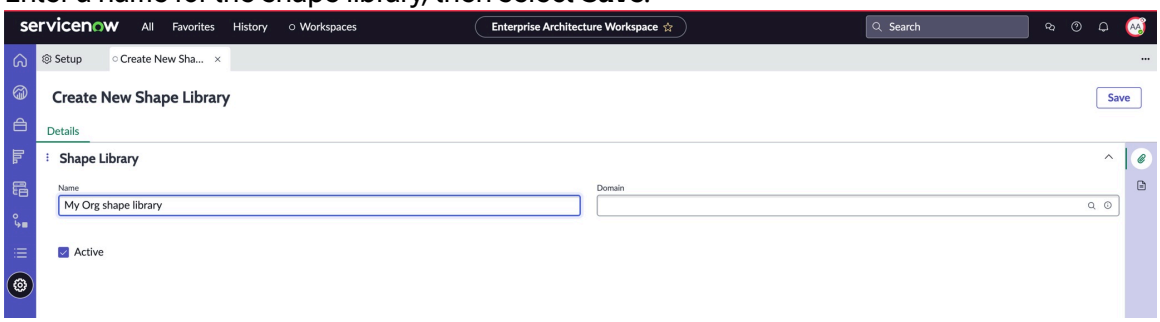
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a. As an APM Admin user, navigate to **Setup** > **Enterprise Modeling and Visualization** > **Shape Libraries**.



b. Select **New**.

c. Enter a name for the shape library, then select **Save**.

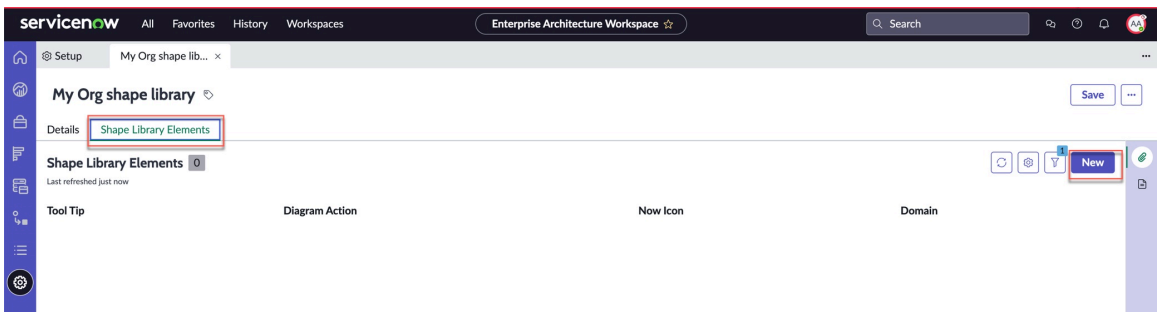


6. Add a shape library element to associate the shape and its diagram action to the shape library.

a. As an APM Admin user, open the shape library you have created in the previous step.

b. Select the **Shape Library Elements** tab.

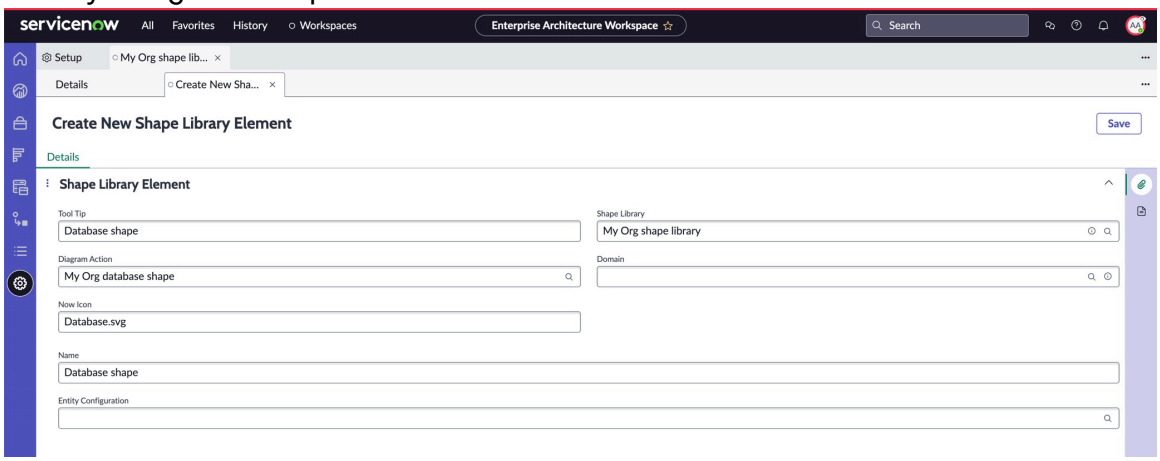
c. Select **New**.



d. In the Shape library element form, enter the following details:

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- Tool tip- Enter text that you want to see on hovering the image.
- Diagram action- Select the diagram action that you have created in the previous step.
- Now icon- Enter the name of the shape or image.
- Name- Enter a name for the shape to be displayed in the Enterprise Modeling and Visualization application.
- Shape library- This field is automatically selected.
- Domain- Optional field.
- Entity configuration- Optional field.

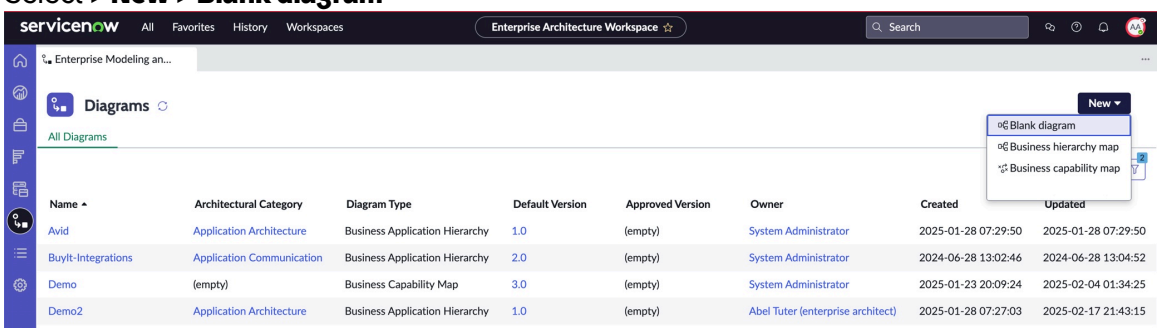


e. Select **Save**.

7. Create a diagram using the shape uploaded.

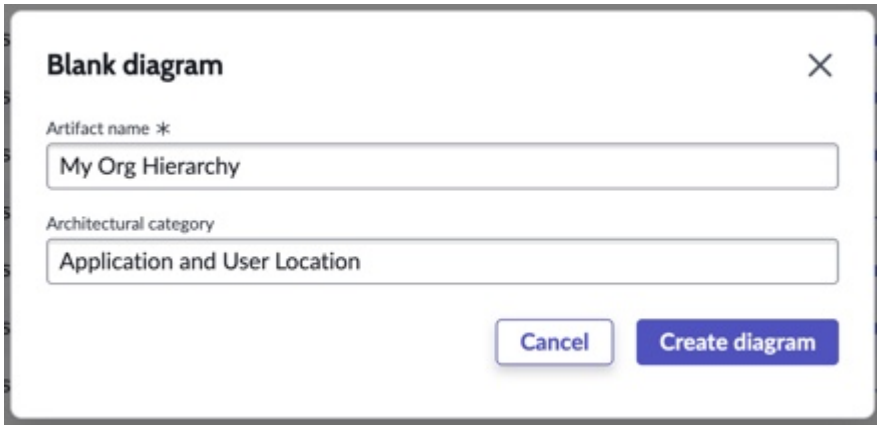
a. Navigate to **Enterprise Modeling and Visualization** page.

b. Select > **New** > **Blank diagram**



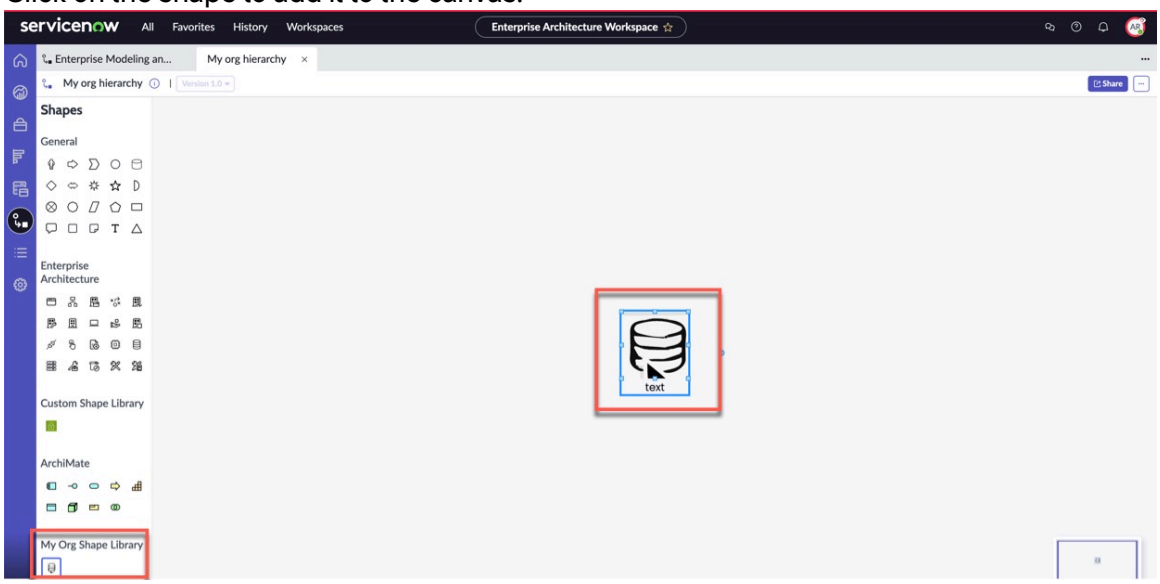
c. Enter a name for the diagram and optionally, you can enter or select an existing architectural category for the diagram.

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Observe that the shape library that you created appears in the Shapes pallet. It contains the shape that you uploaded.

d. Click on the shape to add it to the canvas.



The selected shape gets added to the canvas.

Related topics

- Storing shapes or images to the database
- Create a diagram action for a custom shape
- Add a custom shape library
- Add a shape library element for a custom shape

Convert a shape to a group shape

Group shapes enable you to combine multiple related shapes into a single container for better organization and clarity in diagrams. It's useful for representing logical groupings such as a set of applications under a business capability, related processes under a value stream stage.

Before you begin

Role required: sn_apm.apm_user

About this task

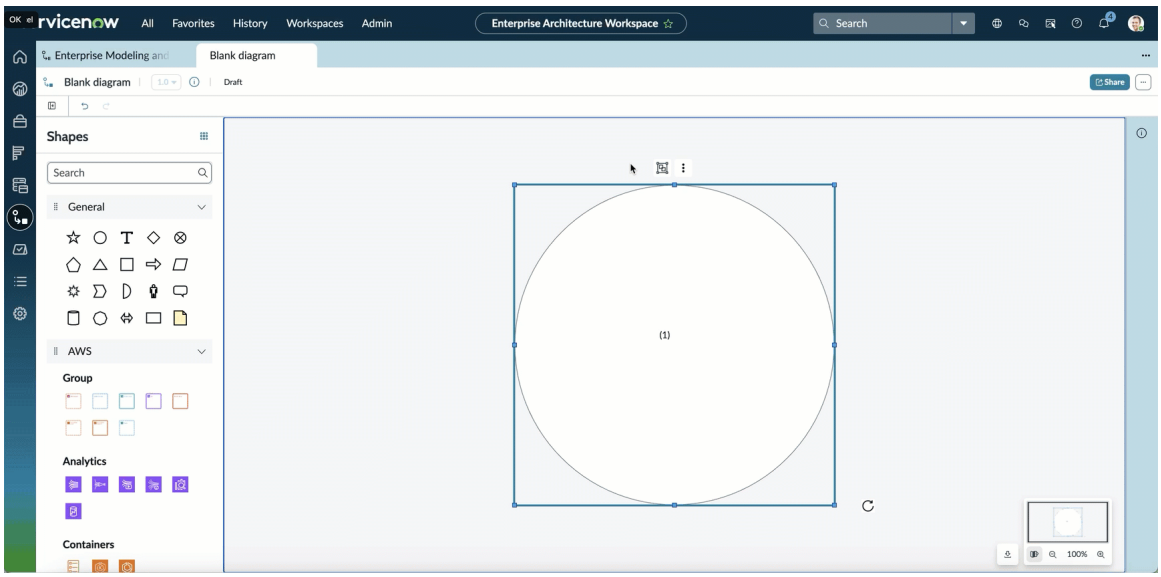
You can convert all general shapes to group shapes, except shapes such as actor, sticky note, and junction.

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Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Modeling page by selecting the Enterprise Modeling and Visualization icon ( ).
3. Create a blank diagram or open an existing diagram.
4. Add a shape from the **General** shapes section.
5. Select the **Convert to groupable shape** icon.
   The shape becomes a container shape. You can add other elements in the shape. The parent shape and child shapes behave as a single group.

Note: To ungroup and make it as a normal shape, select **Revert to normal shape** icon.



Expand or collapse a group shape

The expand and collapse functionality for a group shape helps in simplifying visualization, improves focus, and supports hierarchical modeling.

Before you begin

Role required: sn_apm.apm_user

About this task

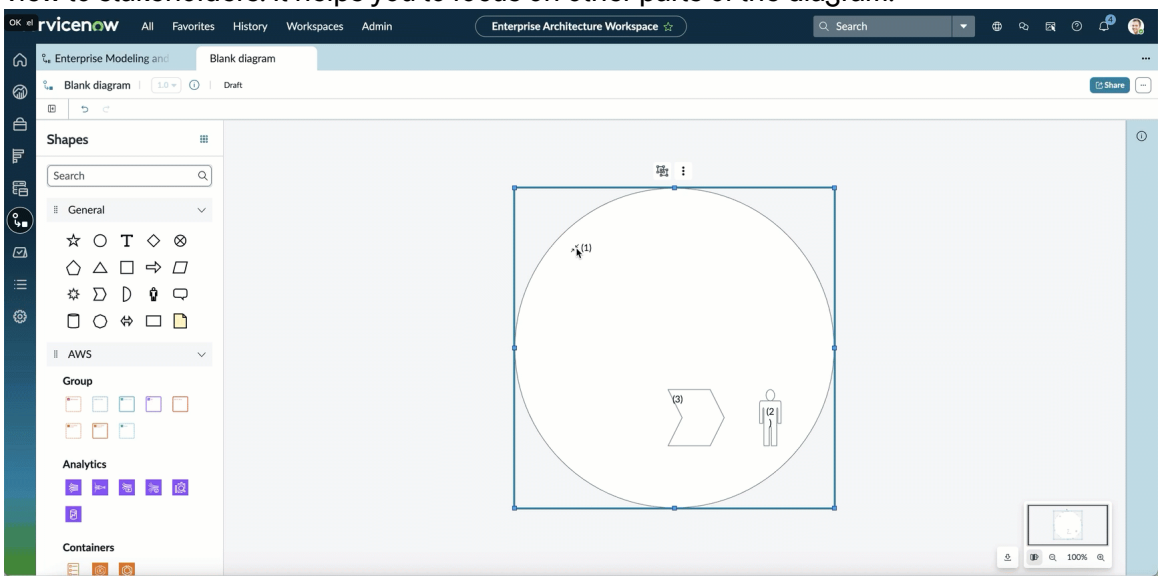
Large diagrams can be cluttered. Collapsing groups hides internal details while keeping the overall structure visible. Enables architects to concentrate on high-level architecture or drill down into details when needed. Groups represent logical clusters (for example, applications under a capability, AWS resources inside a VPC), and expand/collapse helps manage these hierarchies.

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Modeling page by selecting the Enterprise Modeling and Visualization icon ( ).
3. Create a blank diagram or open an existing diagram.
4. Add a shape from the General shapes section or select an existing shape.
5. Select the expand or collapse icon within the group shape to expand or collapse the group shape accordingly.

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Expanding a shape helps in analyzing dependencies or editing details inside a group. Collapsing a group shape helps in presenting a high-level architecture view to stakeholders. It helps you to focus on other parts of the diagram.



Download a modeling diagram as an image

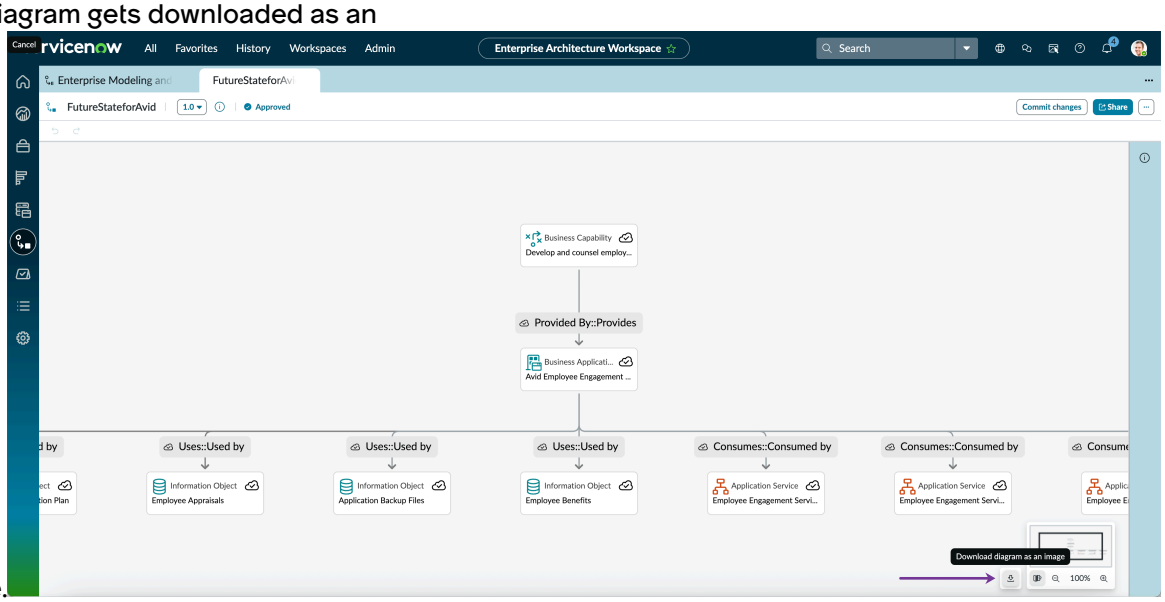
Download a diagram as an image to share it with other stakeholders with offline access or use it in the presentations.

Before you begin

Role required: sn_apm.apm_user

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Modeling page by selecting the Enterprise Modeling and Visualization icon ( ).
3. Create a Blank diagram or open an existing diagram.
4. Select the **Download diagram as an image** icon.
   The diagram gets downloaded as an image.



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Reorder shapes categories

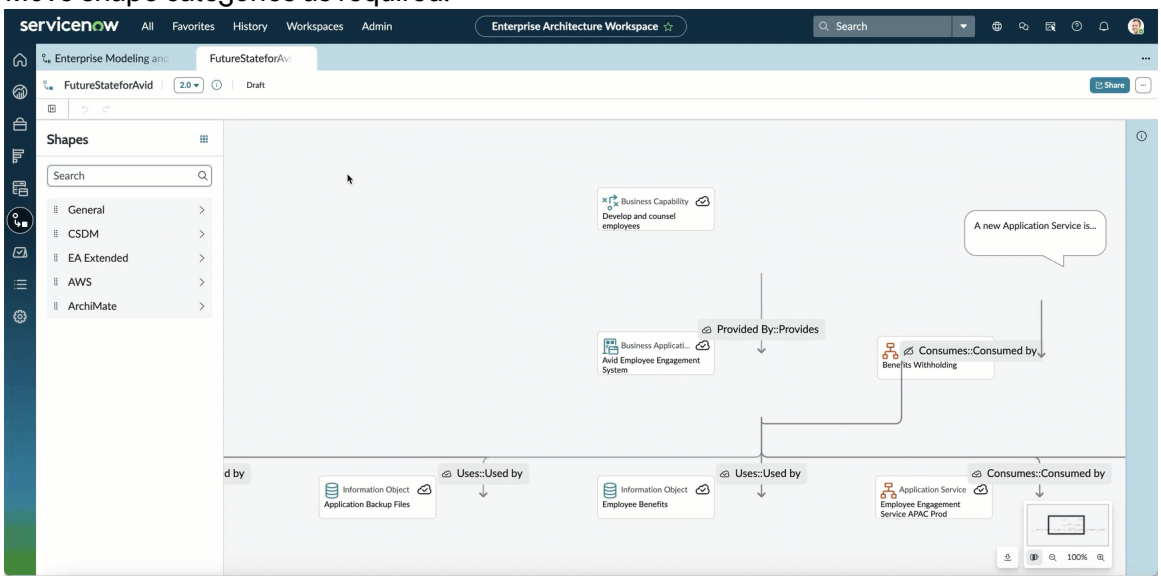
Reordering shape categories helps architects customize the panel for faster access to frequently used shapes.

Before you begin

Role required: sn_apm.apm_user

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Modeling page by selecting the Enterprise Modeling and Visualization icon ( ).
3. Create a new diagram or open an existing diagram.
4. Move shape categories as required.



Align and distribute shapes in a modeling diagram

Organize shapes on the diagram canvas by aligning them to a common edge or center, or by distributing them at equal spacing.

Before you begin

You must have Owner or Editor access to the diagram.

Role required: sn_apm.apm_user

About this task

https://service-now.portal.trainn.co/share/TKjzWspqaFfR6l49nXoaFA/embed?autoplay=false

When working with multiple shapes on the diagram canvas, you can use the alignment and distribution options to arrange them. Select two or more shapes to enable the alignment toolbar options. Select three or more shapes to enable the distribute options.

Note: You can't align or distribute shapes in a business capability map diagram.

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Modeling page by selecting the Modeling icon ( ).

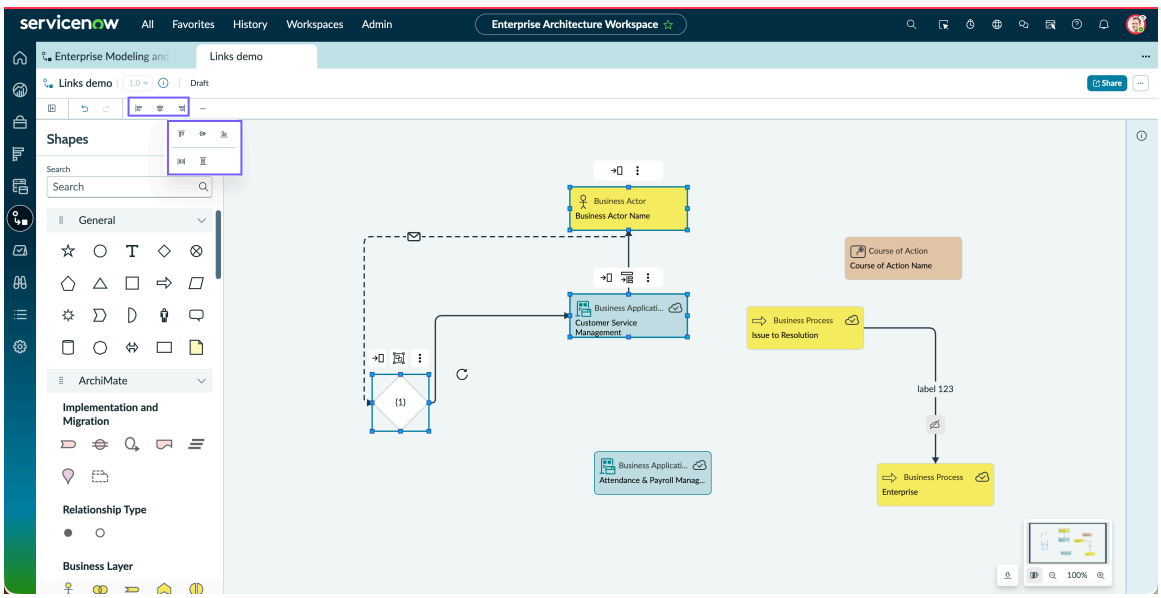
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3. Select an existing diagram.
4. On the canvas, select two or more shapes that you want to align.

   Note: If only one shape is selected, the alignment options are inactive.

5. Select one of the following alignment options from the diagram toolbar:
   - **Align left**: Aligns the left edges of all selected shapes.
   - **Align center horizontally**: Aligns the horizontal centers of all selected shapes.
   - **Align right**: Aligns the right edges of all selected shapes.
6. To access additional alignment options, select the **More alignment options** menu (...) in the toolbar, and then select one of the following options:
   - **Align top**: Aligns the top edges of all selected shapes.
   - **Align center vertically**: Aligns the vertical centers of all selected shapes.
   - **Align bottom**: Aligns the bottom edges of all selected shapes.
7. **Optional:** To distribute three or more shapes at equal spacing, select the shapes and then select one of the following options from the **More options** menu:
   - **Distribute horizontally**: Spaces the selected shapes at equal horizontal intervals. The leftmost and rightmost shapes act as fixed reference points, and the shapes in between are evenly spaced.
   - **Distribute vertically**: Spaces the selected shapes at equal vertical intervals. The topmost and bottommost shapes act as fixed reference points, and the shapes in between are evenly spaced.

   Note: The distribute options require a minimum of three shapes to be selected.



Related topics

Create a blank diagram using modeling in the EA Workspace

Convert a shape to a group shape

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Replace a shape in a diagram

Replace any shape on the diagram canvas with a different shape type. When you replace a shape, relationship lines update automatically to reflect the new shape type.

Before you begin

You must have the Owner or Editor access to the artifact or diagram.

Role required: sn_apm.apm_user

About this task

You can replace any shape on the canvas with a different shape type, including CI shapes, ArchiMate shapes, and general shapes. When you replace a shape:

- CI or reference relationship lines update to reflect the relationship between the new shape types.
- ArchiMate relationship lines update based on the new shape type.
- If both the original and replacement shapes are general shapes, relationship lines remain unchanged.
- Labels on relationship lines are preserved after the replacement.

You can also update the entity associated with a shape without changing the shape type.

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Modeling page by selecting the Enterprise Modeling and Visualization icon ().
3. Select an existing diagram from the Diagrams page.
4. Select the shape you want to replace.
5. Open the side panel for the selected shape by selecting the Open side panel icon ().
6. In the **Shape Type** field, search for and select the shape type you want to use as the replacement.
   You can type in the field to filter the list of available shape types.
7. Select and map an existing entity or create an entity for the replacement shape.
   - To associate an existing entity, select **Choose Existing** and select an entity from the list.
   - To create an entity, select **Create New** and enter the required details.
8. Select **Update**.

Result

The shape is replaced on the canvas. Relationship lines between the replaced shape and connected shapes update based on the new shape type, and labels on relationship lines are preserved. If the shape was part of a group, it remains in the group after the replacement.

Related topics

Shapes to create a modeling diagram

Synchronize a shape to the database

Delete a shape

Add related records in the modeling diagram

ArchiMate shapes support in the Enterprise Modeling and Visualization

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Show or hide shapes panel

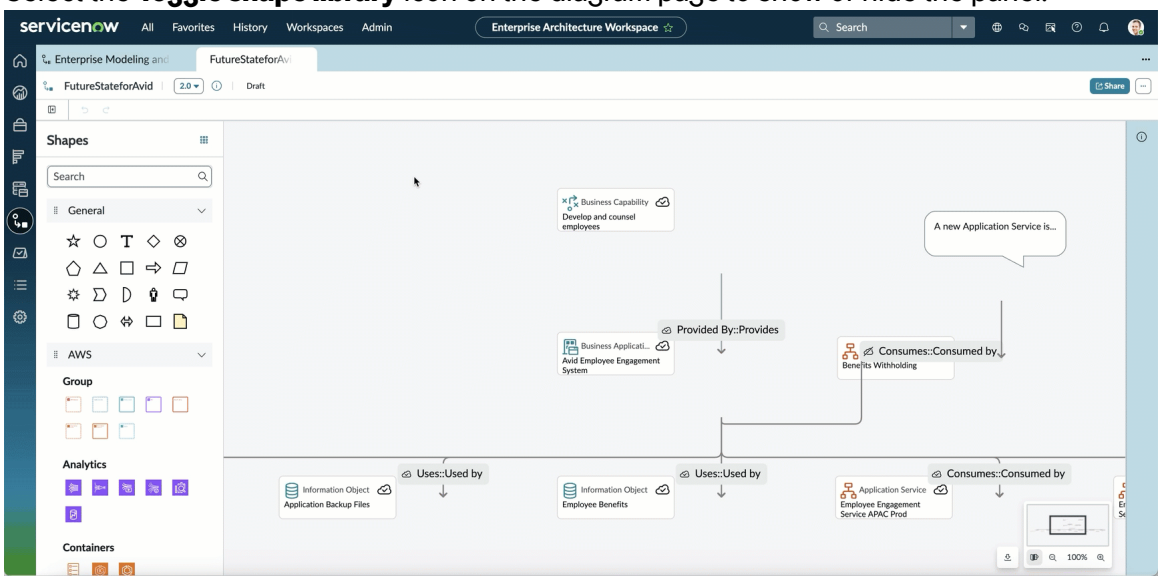
Show or hide the Shapes Panel to optimize your workspace for different tasks.

Before you begin
Role required: sn_apm.apm_user

About this task
Useful for browsing shape libraries or searching for specific elements. When you want more canvas space for editing or presenting diagrams, reduces visual clutter during reviews or when focusing on layout adjustments.

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Modeling page by selecting the Enterprise Modeling and Visualization icon ( ).
3. Create a diagram or open an existing diagram.
4. Select the **Toggle shape library** icon on the diagram page to show or hide the panel.



Switch to list or grid view of shapes panel

Switch between List View and Grid View in the shapes panel according to your modeling needs.

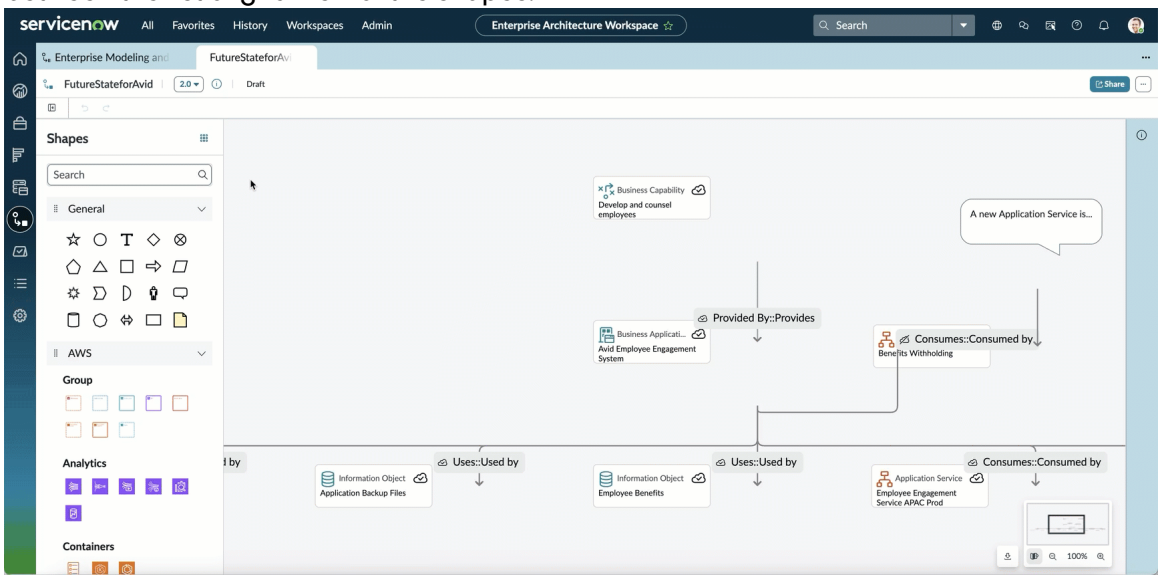
Before you begin
Role required: sn_apm.apm_user

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Modeling page by selecting the Enterprise Modeling and Visualization icon ( ).
3. Create a new diagram or open an existing diagram.

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4. Select the **Switch to list view** or **Switch to grid view** icon on the diagram page to switch between the list or grid view of the shapes.



Search shapes in a diagram

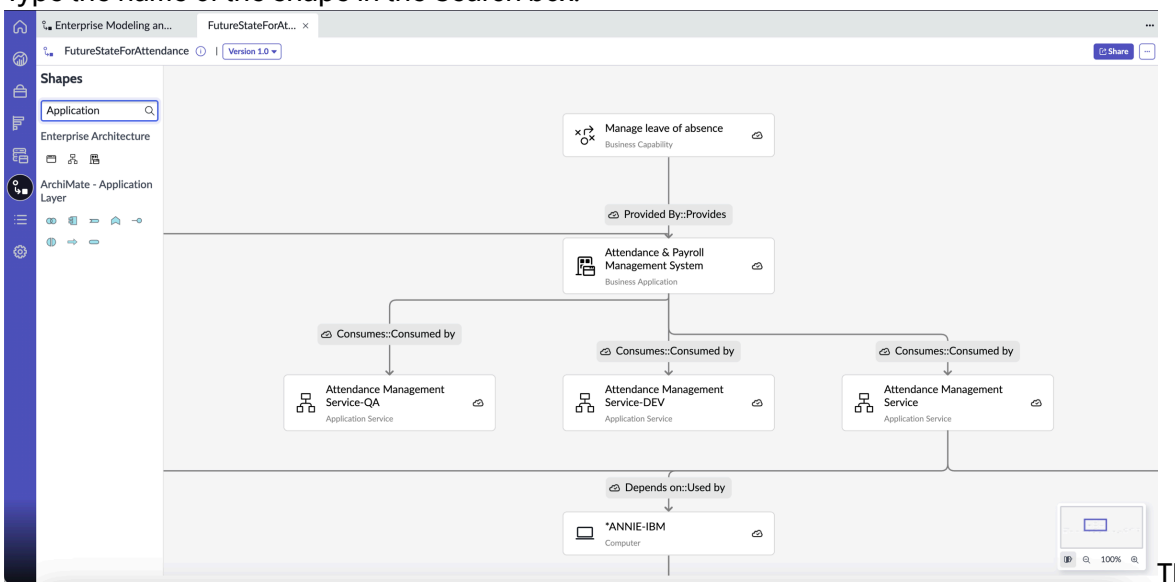
Search for a shape in the Shapes palette of a diagram.

Before you begin

Role required: sn_apm.apm_user

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Modeling page by selecting the Enterprise Modeling and Visualization icon ( ).
3. Create a new diagram or open an existing diagram.
4. Type the name of the shape in the Search box.



The corresponding shapes appear in the panel.

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Related topics

- Create a blank diagram using modeling in the EA Workspace
- Working with business capability map
- Working with business hierarchy map
- Working with business process map
- Working with ArchiMate Shapes
- Working with custom shapes
- Add related records in the modeling diagram
- Share a modeling diagram
- Commit diagram changes
- Save as a version
- Duplicate a modeling diagram
- Submit a modeling diagram for approval
- Synchronize a shape to the database
- Approve or reject a modeling diagram request
- Delete a shape

Add related records in the modeling diagram

Fetch and add specific related records to the selected shape in a diagram.

Before you begin

https://service-now.portal.trainn.co/share/UbdGE2EzGDFlOdr5w24A9w/embed?autoplay=false

Role required: sn_apm.apm_user and Owner or Editor access to the artifact or diagram

About this task

You can add both upstream and downstream related entities to a shape in a diagram.

- Upstream entities appear as the parents of a selected shape. They represent inputs, dependencies, or higher-level components that influence the selected shape. For example, for a business process, an upstream entity can be a business capability.
- Downstream entities appear as children of the selected shape. They represent the outputs or consequences that are influenced by the selected shape. For example, for a business capability, a downstream entity can be a business application.

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Modeling page by selecting the Enterprise Modeling and Visualization icon ( ).
3. Select an existing diagram from the Diagrams page.
4. Select a shape in the diagram and open the context menu.
5. Open the Add related records pop-up window by selecting the Add related records icon ( ).
6. Select the specific entities that you want to add to the diagram.

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- Select the Expand row icon ( ) next to **Upstream** or **Downstream** to view the list of available related entities.
- Select the Expand row icon ( ) next to an entity type to view the individual records within that type.
- Select the check box next to the individual records that you want to add.

7. Select **Add**.

Result
The selected entities are added to the diagram for the object.

Related topics
Share a modeling diagram

Commit diagram changes

Save as a version

Duplicate a modeling diagram

Submit a modeling diagram for approval

Synchronize a shape to the database

Delete a shape

Share a modeling diagram

Share your draft diagrams with individuals and groups and define access levels for them to view and modify the diagram.

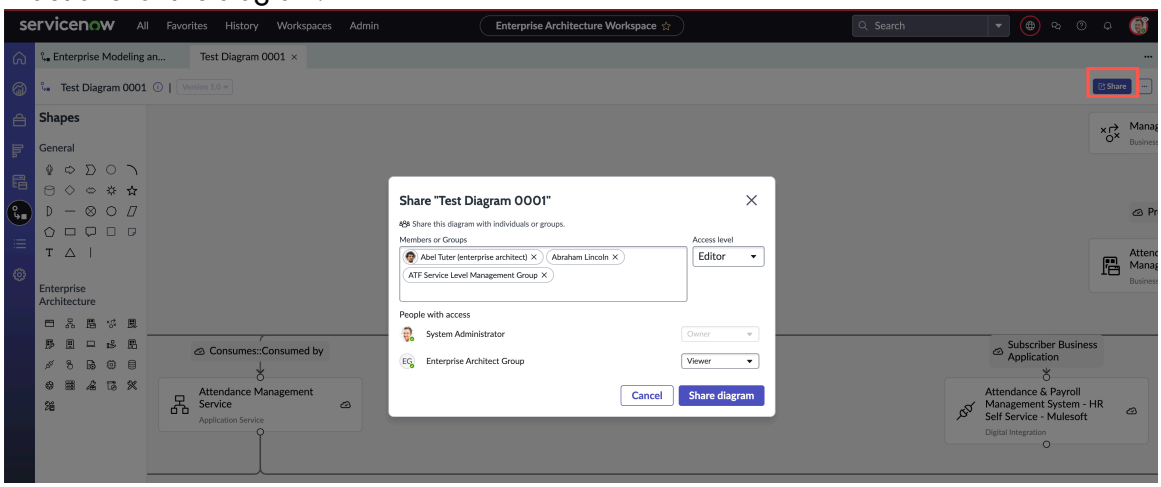
Before you begin
Role required: sn_apm.apm_user

Note: You must have the Owner or Editor access to the artifact or diagram.

Procedure
1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Modeling page by selecting the Modeling Enterprise Modeling and Visualization icon ( ).
3. Select an existing diagram that you created and you want to share with others.
4. Select **Share**.
5. Add member and groups with whom you want to share the diagram.
   You can provide the following access levels to the members and groups:

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- **Owner**: With this access, you can edit the diagram, share the diagram, and modify access levels for other users (except for the actual owner of the diagram).
- **Editor**: You can edit the diagram, share the diagram with Editor or Viewer access for other users, and modify access levels for the users added by you.
- **Viewer**: With this access, you can only view the diagram, and can't perform any other actions for the diagram.



Related topics

- Create a diagram for a business capability map
- Update a business capability map
- Add capabilities or applications to a capability map
- Create diagram for a business hierarchy map
- Update a business application hierarchy map
- Commit diagram changes
- Save as a version
- Duplicate a modeling diagram
- Submit a modeling diagram for approval
- Synchronize a shape to the database
- Add related records in the modeling diagram
- Delete a shape

Commit diagram changes

Synchronize an approved diagram and all its elements to the database.

Before you begin

Role required: sn_apm.apm_analyst

Note: You must have the Owner or Editor access to the artifact or diagram.

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Modeling page by selecting the Enterprise Modeling and Visualization icon ( ).
3. Select an existing diagram from the Diagrams page.

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4. Select **Commit changes**.
5. Synchronize the diagram by selecting **Commit**.

Result
The diagram is synced to the ServiceNow database.

Related topics
- Create a diagram for a business capability map
- Update a business capability map
- Add capabilities or applications to a capability map
- Create diagram for a business hierarchy map
- Update a business application hierarchy map
- Share a modeling diagram
- Save as a version
- Duplicate a modeling diagram
- Synchronize a shape to the database
- Add related records in the modeling diagram
- Delete a shape

Save as a version

Copy an existing diagram and create a version for it within the selected architectural artifact. You can update the new version as required.

Before you begin
Role required: sn_apm.apm_user

Note: You must have the Owner or Editor access to the artifact or diagram.

Procedure
1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Modeling page by selecting the Enterprise Modeling and Visualization icon ( ).
3. Select an existing diagram from the Diagrams page.
4. Select the More actions menu (...).
5. Select **Save as new version**.
   In the Save as new version window, the Version number field is automatically updated with a number for the diagram. This field is a non-editable field.
6. Select **Save**.

Result
This action saves the diagram as a new version within the existing architectural artifact. The Version drop-down shows the newly created version.

Related topics
- Create a diagram for a business capability map
- Update a business capability map

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- Add capabilities or applications to a capability map
- Create diagram for a business hierarchy map
- Update a business application hierarchy map
- Share a modeling diagram
- Duplicate a modeling diagram
- Save as a version
- Add related records in the modeling diagram
- Delete a shape

Add or edit diagram version details

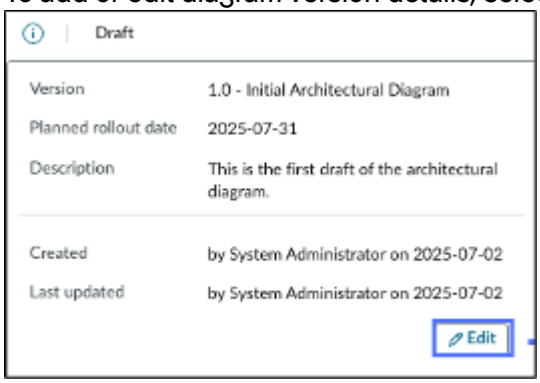
You can add or edit version-specific details for a diagram to improve change management and compliance. Adding diagram version details ensures better clarity between all stakeholders in the context of the diagram and timelines.

Before you begin

Role required: sn_apm.apm_user and Owner or Editor access to the artifact or diagram

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Modeling page by selecting the Enterprise Modeling and Visualization icon ( ).
3. Select a diagram from the Diagrams page.
4. Select the View details icon ( ) next to the version drop-down.
5. To add or edit diagram version details, select **Edit**.



6. On the **Edit version detail** form, fill in the fields.
   For field information, see Edit version detail form.
7. Select **Save**.

Result

The diagram version details are added. The diagrams List view shows details of the latest and approved versions.

Related topics

- Exploring Enterprise Modeling and Visualization in the EA Workspace

Duplicate a modeling diagram

You can make a copy of an existing diagram that you created and modify the duplicate diagram according to your requirement.

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Before you begin

Role required: Role required: sn_apm.apm_user and Owner or Editor access to the artifact or diagram

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Modeling page by selecting the Enterprise Modeling and Visualization icon ( ).
3. Select an existing diagram from the Diagrams page.
4. Select the More actions menu .
5. Select **Duplicate**.
6. Enter a name for the diagram.
   On duplicating a business process map, the value in the **Link to business process** field in the **Duplicate** pop-up window is selected by default, based on the status of the business process associated with the original business process map.
   - If the original business process isn't committed to the database:
     - The default selection in the **Link to business process** field is **New**.
     - You can rename the business process in the **Name of new business process** field.
   - If the original business process exists in the database:
     - The default selection in the **Link to business process** field is **Existing**.
     - You can choose a different business process using the **Select existing business process** field.

   You can change the default values in the **Link to business process** field according to your requirement.
7. Select **Duplicate**.

Result

A duplicate diagram is created.

Related topics

Create a diagram for a business capability map

Update a business capability map

Add capabilities or applications to a capability map

Create diagram for a business hierarchy map

Update a business application hierarchy map

Add related records in the modeling diagram

Share a modeling diagram

Commit diagram changes

Save as a version

Submit a modeling diagram for approval

Synchronize a shape to the database

Delete a shape

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Submit a modeling diagram for approval

Send your draft modeling diagrams for approval. After receiving the approval, you can commit the diagram to the database. The approval process can be done through a configured workflow. By default, the approval request is submitted to the Enterprise Architect group.

Before you begin

Role required: sn_apm.apm_user

Note: You must have the Owner or Editor access to the artifact or diagram.

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Modeling page by selecting the Enterprise Modeling and Visualization icon ( ).
3. Select an existing diagram from the Diagrams page.
4. Select the More actions menu .
5. Select **Submit for approval**.
6. Select **Submit**.

After the diagram is submitted for approval, you can't change the diagram.

Related topics

- Create a diagram for a business capability map
- Update a business capability map
- Add capabilities or applications to a capability map
- Create diagram for a business hierarchy map
- Update a business application hierarchy map
- Share a modeling diagram
- Commit diagram changes
- Save as a version
- Duplicate a modeling diagram
- Synchronize a shape to the database
- Add related records in the modeling diagram
- Delete a shape

Synchronize a shape to the database

Add a shape to a diagram. Synchronize the shape to the database by mapping the shape to an existing CI or adding a CI.

Before you begin

Role required: sn_apm.apm_user

Note: You must have the Owner or Editor access to the artifact or diagram and must have read access to the shape entity.

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Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Modeling page by selecting the Enterprise Modeling and Visualization icon ().
3. Select an existing diagram from the Diagrams page.
4. Add a shape to an existing or new diagram.

   You can observe that the unsynced icon ( ) is displayed in the shape. It means, the shape hasn't yet synced with the ServiceNow database.
5. Open the side panel with details for the selected shape by selecting the Open the side panel icon ( ).

   Note: The width of the side panel is saved to your user preferences. If you resize the panel, it opens at the same width the next time you open a diagram.
6. Select and map an existing CI or create a CI for the shape.
   - To map an existing CI, select the **Choose Existing** button and select a CI from the drop-down list.
   - To create a CI, select the **Create New** button and enter the details.
7. Send the shape or diagram for approval.
   After receiving the approval, you can see the **Commit** button to synchronize a shape or diagram, or a relationship to the database.
8. Select **Update**.
9. Select **Commit** to synchronize the object to the database and save the diagram.

Result

The shape gets synced to the database.

Related topics

- Create a diagram for a business capability map
- Update a business capability map
- Add capabilities or applications to a capability map
- Create diagram for a business hierarchy map
- Update a business application hierarchy map
- Share a modeling diagram
- Commit diagram changes
- Save as a version
- Duplicate a modeling diagram
- Submit a modeling diagram for approval
- Add related records in the modeling diagram
- Delete a shape

Approve or reject a modeling diagram request

As an Enterprise Architect, approve or reject a Enterprise Modeling and Visualization diagram requests submitted by other users.

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Before you begin
You must be part of the Enterprise Architect Group.

Role required: sn_apm.apm_analyst

About this task
When an Enterprise Modeling and Visualization user requests for a diagram approval, an email notification is received by the approver. The approver belongs to the Enterprise Architect group.

Procedure
1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. In the Needs Attention section, select the **My Approvals** tab.
3. Select an architectural artifact request link in the **Approving** column.
   The diagram gets opened in the Enterprise Modeling and Visualization. If necessary, you can change the diagram.
4. Select **Approve or Reject**.
   In the Approve or Reject modal, select the Status to **Approve** or **Reject**. Enter details in the Comments box.
5. Select **Submit**.

Result
The requester receives an email notification for the approval or rejection.

Related topics
- Working with business capability map
- Working with business hierarchy map
- Working with business process map
- Working with ArchiMate Shapes
- Working with custom shapes
- Synchronize a shape to the database
- Delete a shape
- Submit a modeling diagram for approval
- Duplicate a modeling diagram
- Save as a version

Delete a shape

Delete a shape and all of its relationships from a diagram.

Before you begin
Role required: sn_apm.apm_user

Note: You must have the Owner or Editor access to the artifact or diagram.

Procedure
1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Modeling page by selecting the Enterprise Modeling and Visualization icon ().
3. Select an existing diagram from the Diagrams page.

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4. Edit the diagram as required.
5. Select a shape in the diagram.
6. From the More Actions menu (⋮), select the **Delete shape from canvas**.
7. Confirm the deletion.

Result
The selected shape gets deleted from the canvas or from the model.

Related topics

- Shapes to create a modeling diagram
- Create a diagram for a business capability map
- Update a business capability map
- Add capabilities or applications to a capability map
- Create diagram for a business hierarchy map
- Update a business application hierarchy map
- Add related records in the modeling diagram
- ArchiMate shapes support in the Enterprise Modeling and Visualization
- Share a modeling diagram
- Commit diagram changes
- Save as a version
- Duplicate a modeling diagram
- Submit a modeling diagram for approval
- Synchronize a shape to the database

Delete Enterprise Modeling and Visualization diagrams

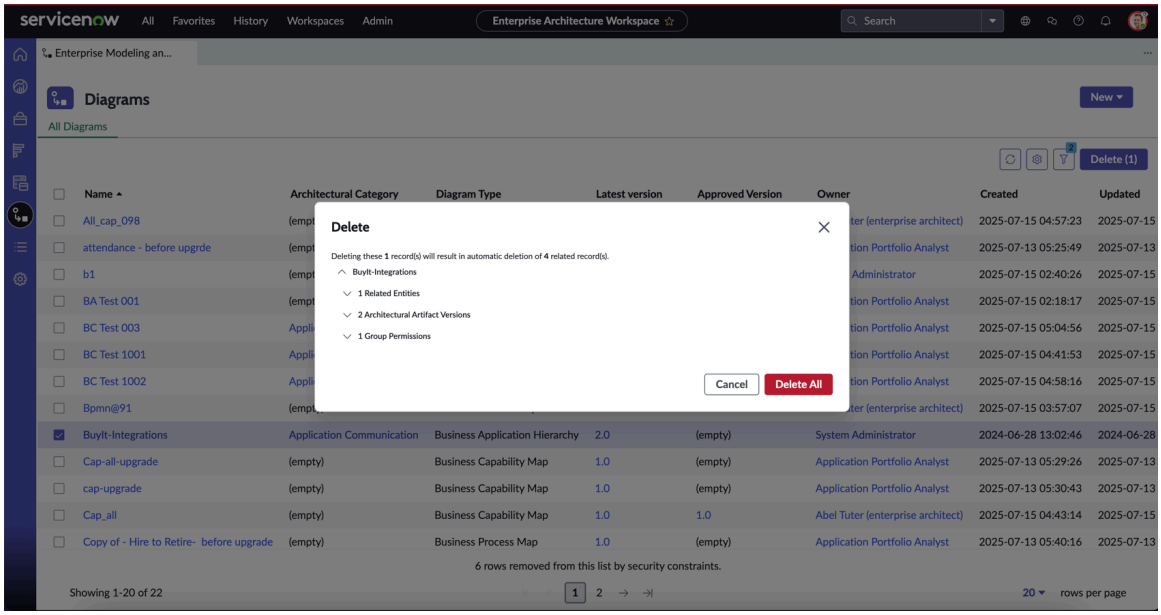
You can delete diagrams from the Enterprise Modeling and Visualization All Diagrams page, confirming only the relevant and current diagrams are available.

Before you begin
Role required: sn_apm.apm_user and Owner access to the diagram

Procedure
1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Modeling page by selecting the Enterprise Modeling and Visualization icon ().
3. Select the checkbox next to the diagram that you want to delete and select **Delete**.

   A confirmation message appears displaying the list of related records associated with the diagram, that will also be deleted.

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4. Select **Delete All**.

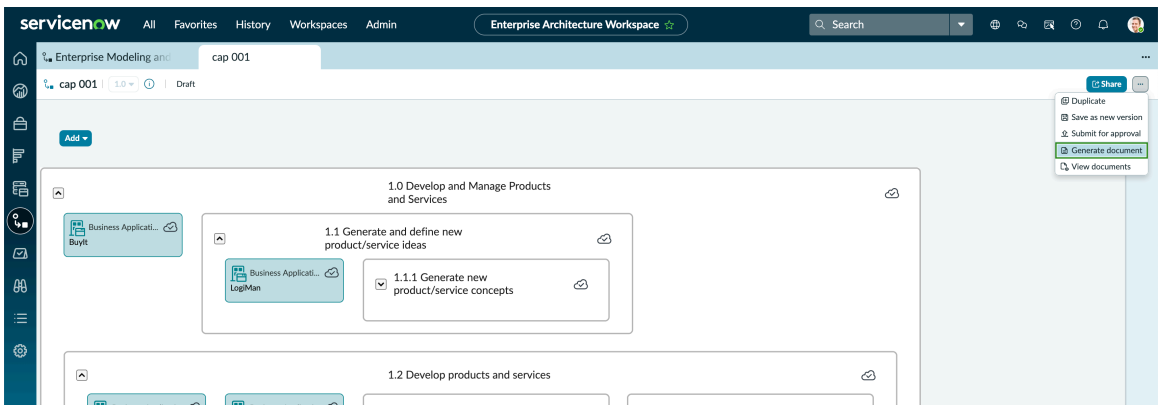
Result
The diagram is deleted from the All Diagrams page.

Generate a document from a diagram

Generate documents from the Enterprise Modeling and Visualization diagrams page.

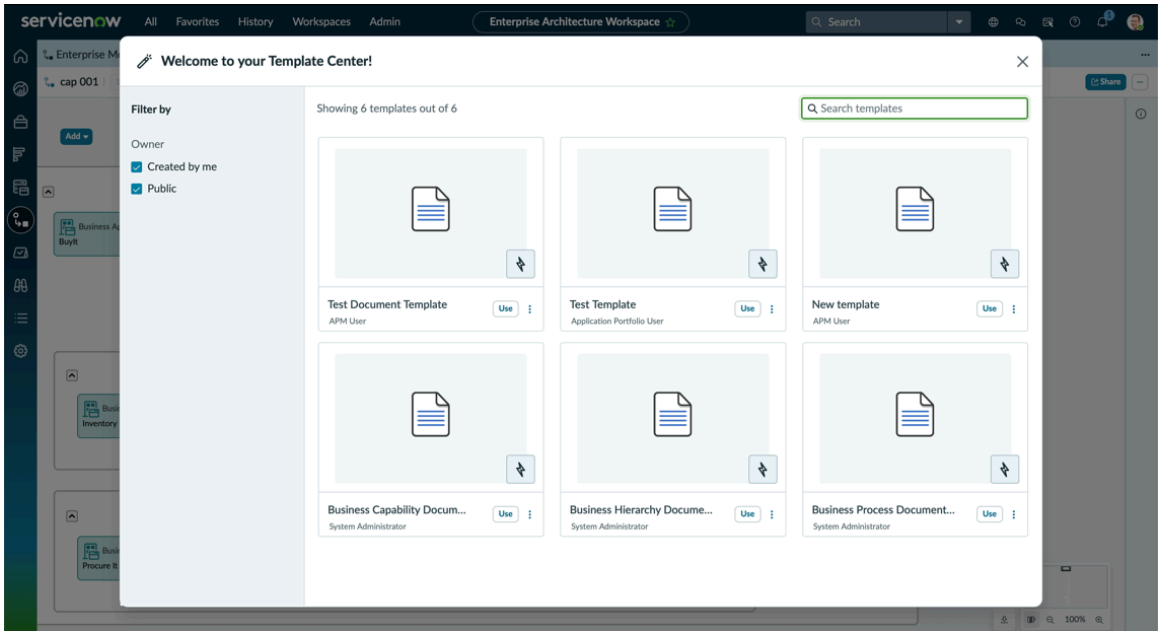
Before you begin
Role required: sn_apm.apm_user

Procedure
1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Modeling page by selecting the Enterprise Modeling and Visualization icon ( ).
3. Select an existing diagram from the Diagrams page.
4. Select the More actions menu .
5. Select **Generate document**.



6. From the Template Center page, select a template for the document.

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7. Enter a name for the document.
8. Select **Create**.
   A confirmation message appears with a link to the newly created document. You can select the link to open the document.

Related topics

- Exploring generating documents from diagrams
- View documents for a diagram
- Working with the document templates
- View all architectural documents

View documents for a diagram

View documents that are generated for a diagram from the Enterprise Modeling and Visualization diagrams page.

Before you begin

Role required: sn_apm.apm_user

Procedure

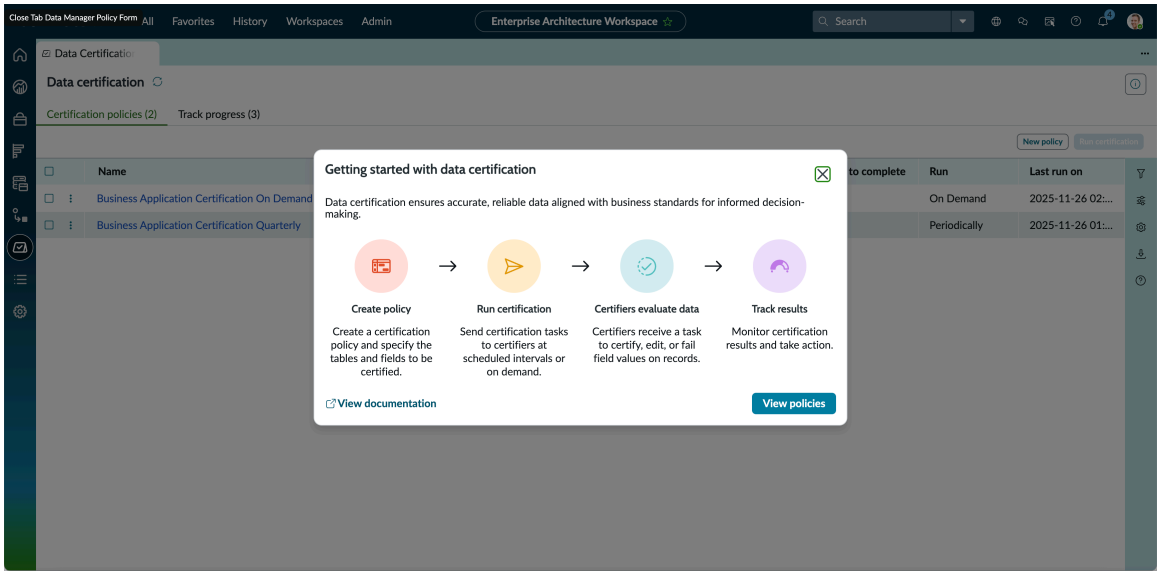
1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Modeling page by selecting the Enterprise Modeling and Visualization icon ( ).
3. Select an existing diagram from the Diagrams page.
4. Select the More actions menu .
5. Select **View documents**.
   System displays all documents associated with the diagram.

Working with data certification

In the Enterprise Architecture Workspace, enterprise architects can manage certifications alongside requests, assessments, and portfolio health insights without switching to separate modules. You can define rules for validating data (for example, application lifecycle, technology

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standards), automate recurring checks (daily, monthly, quarterly), assign certifiers to review and approve data. You can highlight overdue certifications and compliance gaps.



Action and required role mapping for certification policies in the Enterprise Architecture Workspace

Action		cmdb admin + sn_apm.apm_analyst	sn_apm.apm_analyst
View list of policies		Yes	Yes
View track progress		Yes	Yes
View policy by clicking a link to the policy		Yes	No
Create policy		Yes	No
Edit policy		Yes	No
Delete policy		Yes	Yes
Activate policy		Yes	Yes
Deactivate policy		Yes	Yes
Run certification		Yes	Yes
Complete certification through Track progress page		Yes	No

Create a certification policy

Creating a data certification policy serves as a governance mechanism to ensure that the data used in enterprise architecture models and visualizations is accurate, complete, and trustworthy.

Before you begin

https://service-now.portal.trainn.co/share/BES0zOFX0ywk1USL3tAG4A/embed?autoplay=false

Role required: sn_cmdb_admin + sn_apm.apm_analyst

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Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Data certification page by selecting the Data certification icon ().
3. Select **New policy**.
4. On the Create policy modal, enter details, then select **Next**.
   The details are saved as General Information in the workflow. For field information, see General information form.
5. Enter details in the **Data Filter** form.
   For field information, see Data filter form.
   - Select **Apply filters** and then review the results of the impact analysis.
   - Review the lists in the following tabs:
     - **Included records:** You can select records to be excluded from the policy and select **Exclude records**.
     - **Excluded records:** Select records to be included in the policy, and select **Include records**.
   - Select **Continue**.
6. Enter details in the **Assignment** form and then select **Continue**.
   - Set the **Assignment type** and then the **Task assignment** field that appears, to specify the type of assignment and the table columns to use for assigning the policy tasks. The drop-down list in **Task assignment** is dynamically populated with columns in the table that the policy is created for, and that reference **Assignment type** tables, as follows:

     - **User Field**: Assigns policy tasks to a user in the user field specified in **Task assignment**. The drop-down list in **Task assignment** contains fields in the table set by the data filter, that references the User [sys_user] table (such as *`Attested by`* and *`Assigned to`*).

       During assignment, records are grouped based on the selected column, allocated to tasks, and then the tasks are assigned to the resulting users.

     - **User Group Field**: Assigns policy tasks to the user group in the user group field specified in **Task assignment**. The drop-down list in **Task assignment** contains fields from the table set in the data filter, that references the Groups [sys_user_group] table (such as *`Change Group`* and *`Support Group`*).

       During assignment, records are grouped based on the selected column, allocated to tasks, and then the tasks will be assigned to the resulting user group.

     - **Specific User**: Assigns policy tasks to the user specified in **Task assignment**. The drop-down list in **Task assignment** contains users with the *`data_manager_user`* role.
     - **Specific User Group**: Assigns policy tasks to the user group specified in **Task assignment**. The drop-down list in **Task assignment** contains user groups that are either directly associated with the *`data_manager_user`* role, or contain at least one user with the *`data_manager_user`* role.

     In the **User Group Field** and **User Field** you can use dot-walking by selecting the search icon. In the selection dialog box, drill down lists by expanding or selecting list items that are links (usually appear in a unique text color).
   - For certification and attestation tasks, set the **If task assignment field is empty** field to create assigned or unassigned tasks in cases where the specified task assignment field is

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empty. If you select to create an assigned task, then depending on the **Assignment type** setting, select the user or user group to assign a task to in that situation. Unassigned tasks are later reviewed by an administrator for assignment.

7. Enter details in the **Options** form.
   For field information, see Options form.
8. Enter details in the **Schedule** form and then select **Continue**.
   For field information, see Schedule form.
9. Review the policy details on the Review form, and then select **Publish policy** to activate the policy or **Save & Exit** to save the policy as a draft.
   You can later continue to configure a draft policy, and then publish it when it's ready.

Related topics

- Edit a certification policy
- Run certification for a policy
- Track progress of a certification policy
- Activate a certification policy
- Delete a certification policy
- Deactivate a certification policy

Edit a certification policy

Update an existing certification policy details.

Before you begin

Role required: sn_cmdb_admin + sn_apm.apm_analyst

About this task

You can edit the draft or inactive certification policies.

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Data certification page by selecting the Data certification icon ().
   The Data certification page opens.
3. Open draft or an inactive policy by selecting the policy name link.
4. Select **Edit Policy**.
5. Edit the policy details as required.
6. Select **Save & Exit** to save the policy as draft or select **Publish Policy** to publish the draft policy.

Related topics

- Deactivate a certification policy
- Track progress of a certification policy
- Create a certification policy
- Run certification for a policy
- Activate a certification policy
- Delete a certification policy

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View certification policy

View details of a published policy.

Before you begin

Role required: sn_apm.apm_analyst

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Data certification page by selecting the Data certification icon ( ).
   The Data certification page opens.
3. Open a published policy by selecting the policy name link and then select the **View Policy** button.

   Note: Published policies cannot be edited. If you want to edit the policy details, you must deactivate the policy.

4. Select **Exit**.

Related topics

- Deactivate a certification policy
- Edit a certification policy
- Create a certification policy
- Run certification for a policy
- Publish a certification policy
- Activate a certification policy
- Track progress of a certification policy
- Delete a certification policy

Publish a certification policy

Publish a draft policy to activate it and enable certifications to be issued under that policy.

Before you begin

Role required: sn_cmdb_admin + sn_apm.apm_analyst

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Data certification page by selecting the Data certification icon ( ).
   The Data certification page opens.
3. Open a draft policy by selecting the policy name link.
4. Select **Edit Policy**.
5. Edit the policy details as required.
6. Review all the details on the **Review** page.
7. Select **Publish Policy**.

   Note: Ensure all the mandatory fields are filled in before publishing the policy.

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Related topics

- Deactivate a certification policy
- View certification policy
- Edit a certification policy
- Create a certification policy
- Run certification for a policy
- Activate a certification policy
- Track progress of a certification policy
- Delete a certification policy

Run certification for a policy

Run certification for published policies to generate a new certification instance for an active policy.

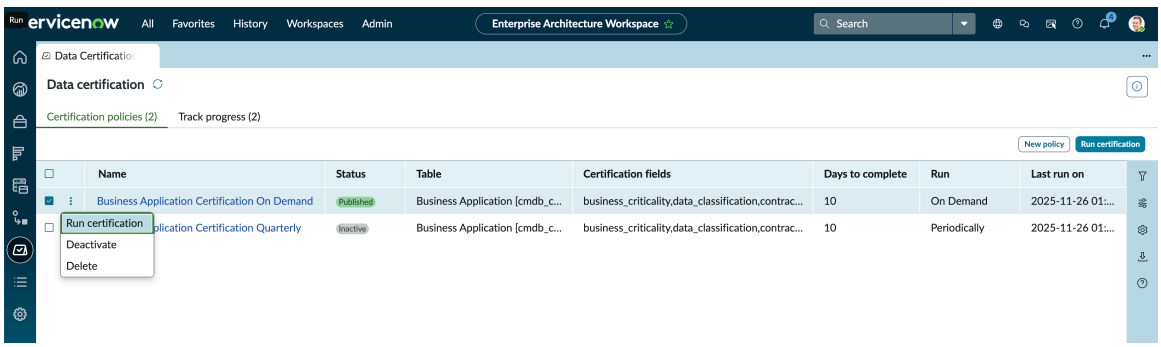
Before you begin

https://player.vimeo.com/video/1199835204?h=95bdd88009&badge=0&autopause=0&player_id=0&app_id=58479

Role required: sn_apm.apm_analyst

Procedure

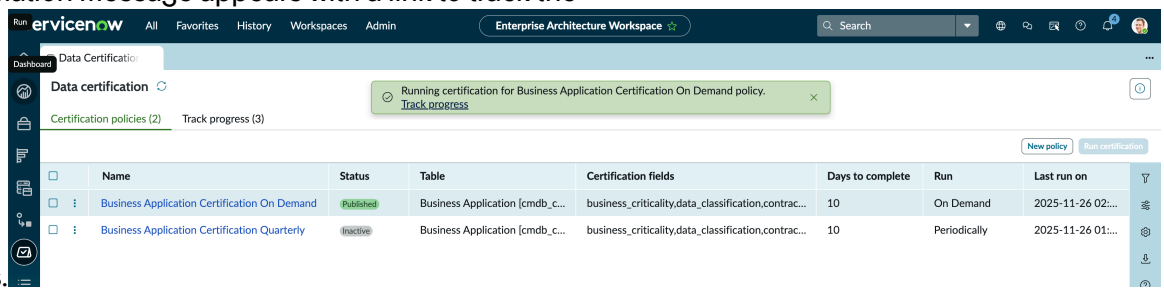
1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Data certification page by selecting the Data certification icon ( ).
   The Data certification page opens.
3. Select the check box next to the policy that you want to run certification for.
4. Select **Run certification** from the context menu or use the **Run certification** button on the page.



5. Select **Run**.

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A confirmation message appears with a link to track the progress.



6. Select the Track progress link or select the Track progress tab to see the status.

Related topics

- Deactivate a certification policy
- Edit a certification policy
- Track progress of a certification policy
- Create a certification policy
- Activate a certification policy
- Delete a certification policy

Data certification task notifications

When a data certification policy runs in the *`Enterprise Architecture Workspace`*, the system automatically sends email notifications to task assignees as due dates approach. This notification behavior is provided by the CMDB Data Manager and does not require additional configuration in the *`Enterprise Architecture Workspace`*.

You can control when notifications are sent by setting the **Days to complete** field when creating a certification policy and by enabling notifications in the CMDB Workspace Data Manager settings. For more information, see Create a certification policy and Components related to CMDB Data Manager.

Notification configuration

The due date notifications for certification tasks are controlled by the **Notifications** property (`sn_cmdb_ws.cmdb.dm.policy_types.due_date_notification`) in the CMDB Workspace Data Manager Settings page. The default value of this property is `attestation,certification`, which means due date notifications are active for both certification and attestation policy types.

To modify this setting, navigate to **Workspaces** > **CMDB Workspace** > **Management**, select the **Data Manager** link, and then select **Settings** in the left navigation bar. The **Notifications** property requires the `data_manager_admin` role to update.

Set the notification schedule in a certification policy

The **Days to complete** field in the **Options** form of a certification policy determines the time interval used to calculate when notifications are sent. The interval starts when a certification task is created and ends when the specified number of days elapses.

For more information, see Options form.

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Note: Set a realistic number of days to allow assignees enough time to review and certify records before the due date. Notifications are sent at the 50%, 70%, and 90% milestones of this interval.

Notification schedule

After a certification task is created and notifications are enabled, the system sends email reminders automatically based on how much of the **Days to complete** interval has elapsed. Notifications stop as soon as the task is closed.

Notification milestones for certification tasks

Notification	When sent	Recipients
Due date is approaching	50% of the interval has elapsed	Task assignee (`assigned_to` user)
	70% of the interval has elapsed	
	90% of the interval has elapsed	
Due date breached	On the due date (task still open)	Task assignee (`assigned_to` user) and the assignee's manager (`assigned_to.manager`)

Respond to a notification

When you receive a due date notification, use the task number in the email subject to locate the certification task. For information about reviewing and completing certification tasks, see Review and certify data certification tasks.

After the task is closed, no further notifications are sent for that task.

Track progress of a certification policy

Monitor and review the certification policy status to track completion progress and view details such as total tasks, completed tasks, open tasks, and unassigned tasks.

Before you begin

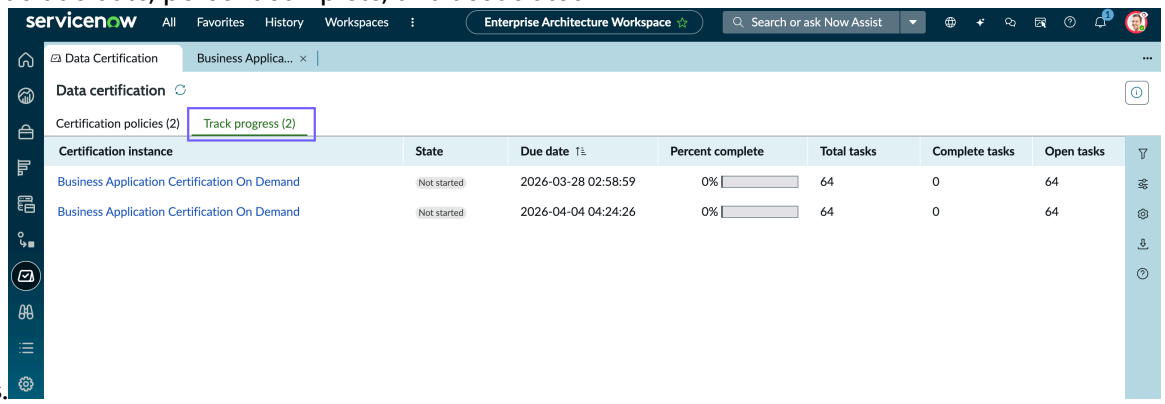
Role required: sn_apm.apm_analyst

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Data certification page by selecting the Data certification icon ( ).
   The Data certification page opens.
3. Select the **Track Progress** tab.

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A list of certification instances are displayed with details such as due date, percent complete, and associated tasks.



Note: You can select each link under the Certification instance column to see associated policy tasks.

Review and certify data certification tasks

You can review and complete data certification tasks to confirm that records meet the standards defined in a certification policy. Certification tasks are generated when a policy is run and are assigned based on the policy's assignment configuration.

Before you begin

https://service-now.portal.trainn.co/share/N8SxOPH353zOhULyARNGpQ/embed?autoplay=false

You must be assigned a certification task as a user or as a member of an assigned user group.

Role required: sn_apm.apm_analyst

About this task

Certification tasks are generated when a data certification policy is run. The review experience in the Enterprise Architecture Workspace uses the underlying Data Certification workflow to review and complete certification tasks directly in the workspace.

If a certification task is assigned incorrectly, you can reassign the task or request reassignment. If you don't know the appropriate reviewer, request an administrator to reassign the task.

Policy configuration can affect review behavior:

- If empty attribute values are disallowed, you can mark certification as failed for records with empty fields, but you must populate those fields before you can certify them.
- If updates to field values are disallowed, you can't update noncompliant records and must mark their certification as failed.

Procedure

1. Navigate to **Workspaces > Enterprise Architecture Workspace**.
2. Select the **My Certifications** tab to view certification tasks assigned to you.
3. Select the certification task that you want to review.
4. Review the task details, including the policy, scope, and instructions.
5. Select **Review records to certify**.
6. In the **Review not completed** tab, review the records included in the task.

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7. Select the appropriate certification status:
   - Select **Certify** to verify that the data is correct.
   - Select **Fail** to indicate that the data doesn't meet certification requirements.
8. **Optional:** Select individual records to review field-level details.
9. **Optional:** In the Certification tasks list, select multiple tasks to reassign tasks in bulk.

   a. Select the Certification tasks tab, then the task or tasks that you want to reassign.
      - Select **Reassign**: Reassign a task to another group or user if you aren't the appropriate user to review the field values and you know who the appropriate reviewer is.
        - **Assignment group**: Select the assignment group the user belongs to.
        - **Assign to:** Search for the appropriate reviewer to reassign this task to.
        - **Submit a reason for this action**: Enter a reason why you are reassigning the task.
      - Select the **Reassign** drop-down menu then select **Assign to me**: Assign the task that isn't assigned to yourself if you are the appropriate reviewer for this task.
      - Select the **Reassign** drop-down menu then select **Request reassignment**: Request to reassign the task, that is assigned to you incorrectly, to someone else. Enter a reason why the task needs to be reassigned, then select **Submit**.

   b. Select **Proceed**.

10. After all records in the task are reviewed, select **Submit**.

Result
The certification task is completed only after all records are reviewed. Records whose review is completed move to the **Review completed** tab.

What to do next
Certification results are applied only to fields that are still pending review. Fields already marked as certified are not affected when you fail certification.

Certification fields are indicated by a check mark in the column header. Other fields are displayed only to help identify the record.

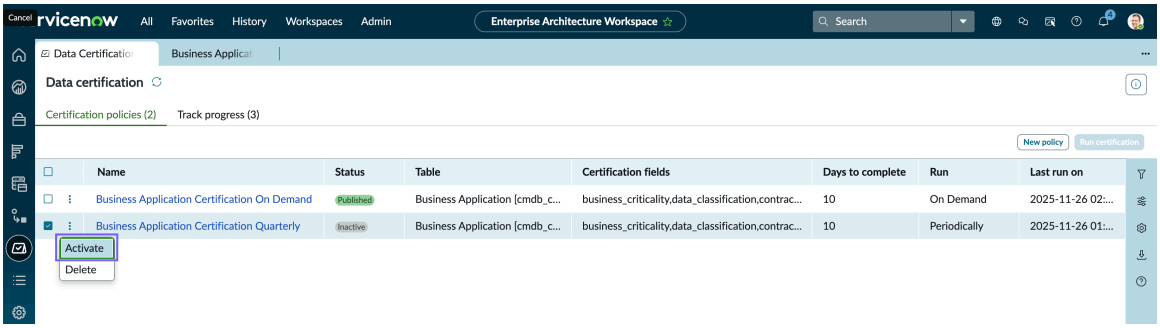
Activate a certification policy

Activate a certification policy to add it to the active certification runs. This process ensures that the policy is active and can be used for certifications.

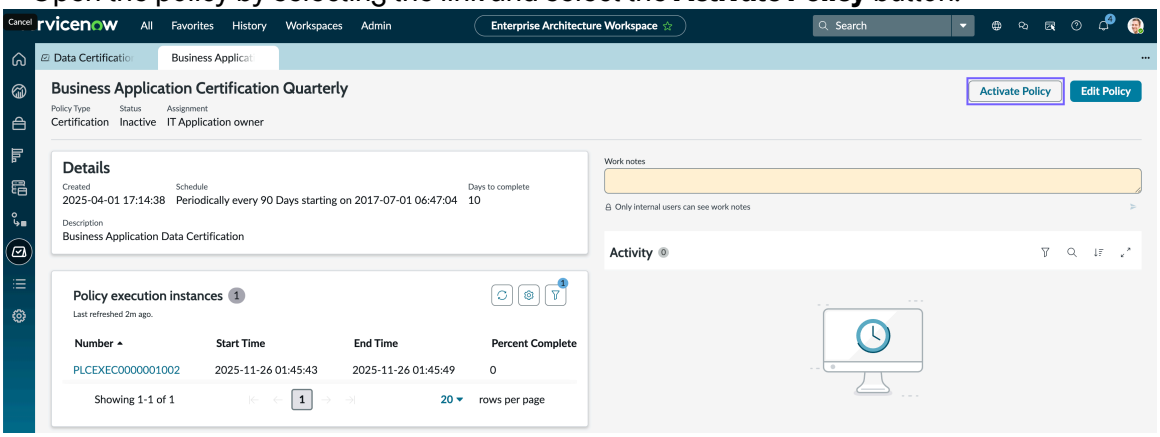
Before you begin
Role required: sn_cmdb_admin + sn_apm.apm_analyst

Procedure
1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Data certification page by selecting the Data certification icon ().
   The Data certification page opens.
3. Use one of the following options to activate an inactive certification policy.
   - Select the check box next to the policy that you want to activate and then select **Activate** from the context menu.

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- Open the policy by selecting the link and select the **Activate Policy** button.



4. Select **Activate Policy**.

Related topics

- Create a certification policy
- Edit a certification policy
- Run certification for a policy
- Track progress of a certification policy
- Activate a certification policy

Deactivate a certification policy

Deactivate a published policy to remove it from active certification runs. This process ensures that the policy is no longer active and can't be used for certifications.

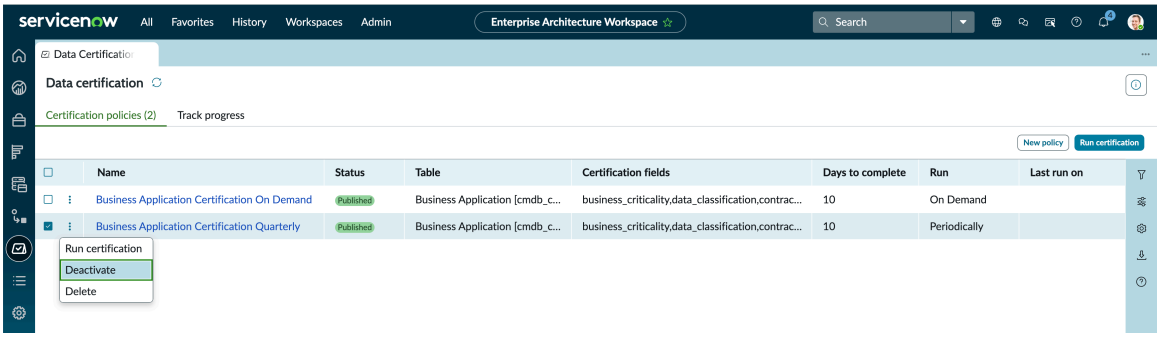
Before you begin

Role required: sn_cmdb_admin + sn_apm.apm_analyst

Procedure

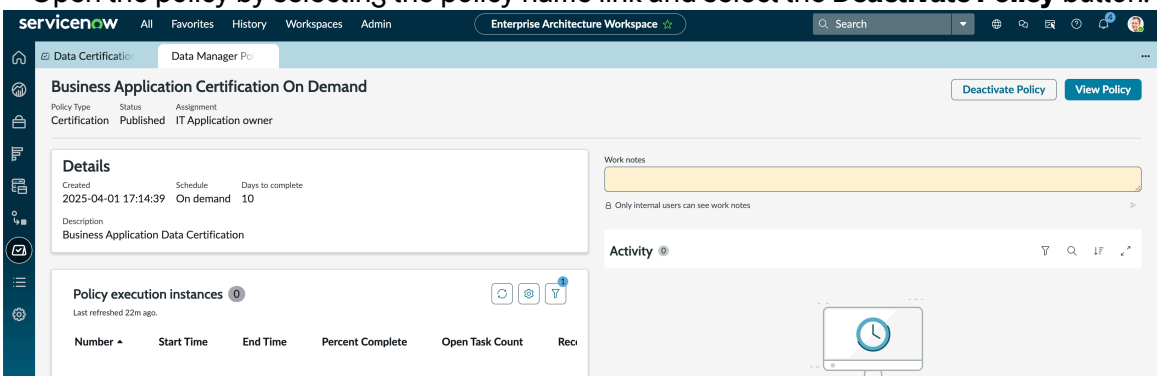
1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Data certification page by selecting the Data certification icon ( ).
   The Data certification page opens.
3. Use one of the following options to deactivate a policy.
   - Select the check box next to the policy that you want to deactivate and then select **Deactivate** from the context menu.

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A confirmation message appears.

- Open the policy by selecting the policy name link and select the **Deactivate Policy** button.



4. Select **Deactivate Policy**.

Related topics

- Edit a certification policy
- Track progress of a certification policy
- Create a certification policy
- Run certification for a policy
- Activate a certification policy
- Delete a certification policy

Delete a certification policy

Delete an unwanted certification policy permanently.

Before you begin

Role required: sn_cmdb_admin + sn_apm.apm_analyst

About this task

Note: Once a certification policy is deleted, the policy and all associated details are permanently removed and cannot be recovered.

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Data certification page by selecting the Data certification icon ( ).
   The Data certification page opens.

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3. Select the check box next to the policy that you want to delete and then select **Delete** from the context menu.

   A confirmation message appears.

   Note: This action permanently deletes the policy and it can't be undone.

4. Select **Delete**.

Related topics

- Create a certification policy
- Edit a certification policy
- Run certification for a policy
- Track progress of a certification policy
- Activate a certification policy
- Deactivate a certification policy

Working with architecture analyzer

Use the architectural analyzer in the Enterprise Architecture Workspace to visually explore and analyze relationships between Common Service Data Model (CSDM) entities like business applications, business capabilities, application services, and information objects.

Create an exploration in the architecture analyzer

You can create an exploration to begin analyzing relationships between architectural entities using the architecture analyzer in the Enterprise Architecture Workspace.

Before you begin

Role required: sn_apm.apm_user

About this task

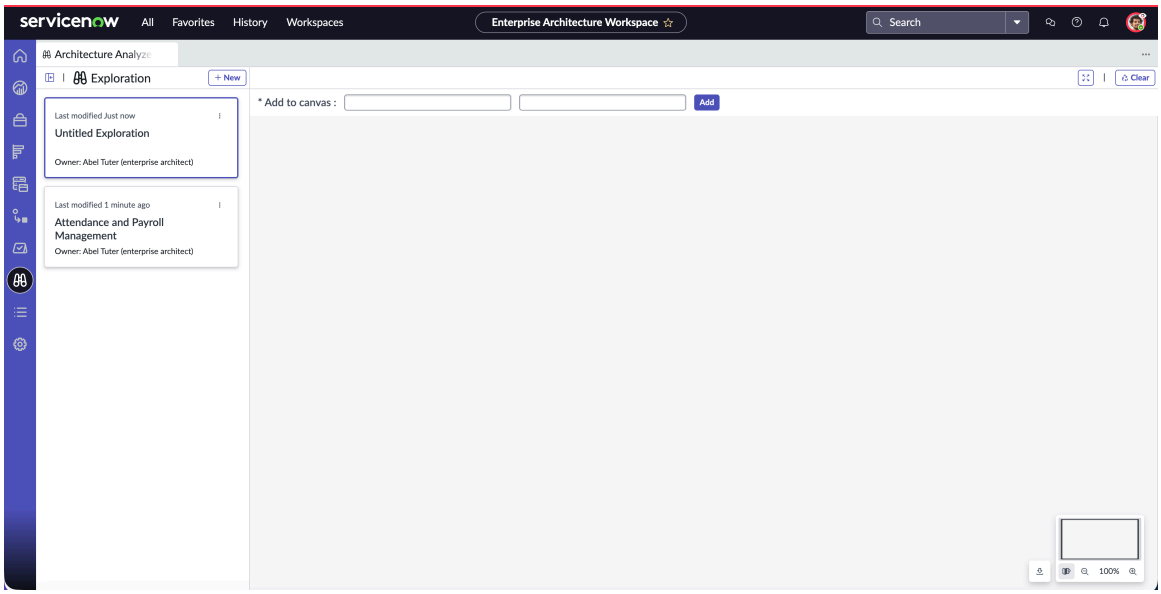
In the Architecture Analyzer you can also perform the following:

- You can add both upstream and downstream related entities to an entity on the architecture analyzer canvas.
  - Upstream entities appear as the parents of a selected entity. They represent inputs, dependencies, or higher-level components that influence the selected entity. For example, for a business process, an upstream entity can be a business capability.
  - Downstream entities appear as children of the selected entity. They represent the outputs or consequences that are influenced by the selected entity. For example, for a business capability, a downstream entity can be a business application.
- To hide the left navigation pane and the **Add to canvas** boxes, select the toggle full-screen icon ()
- To hide just the left navigation pane, select the toggle sidebar icon ()
- To clear all entities from the canvas and the selections made in the **Add to canvas** boxes, select the **Clear** button ()
- To download the exploration canvas in image format, select the download as an image icon ()

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Procedure

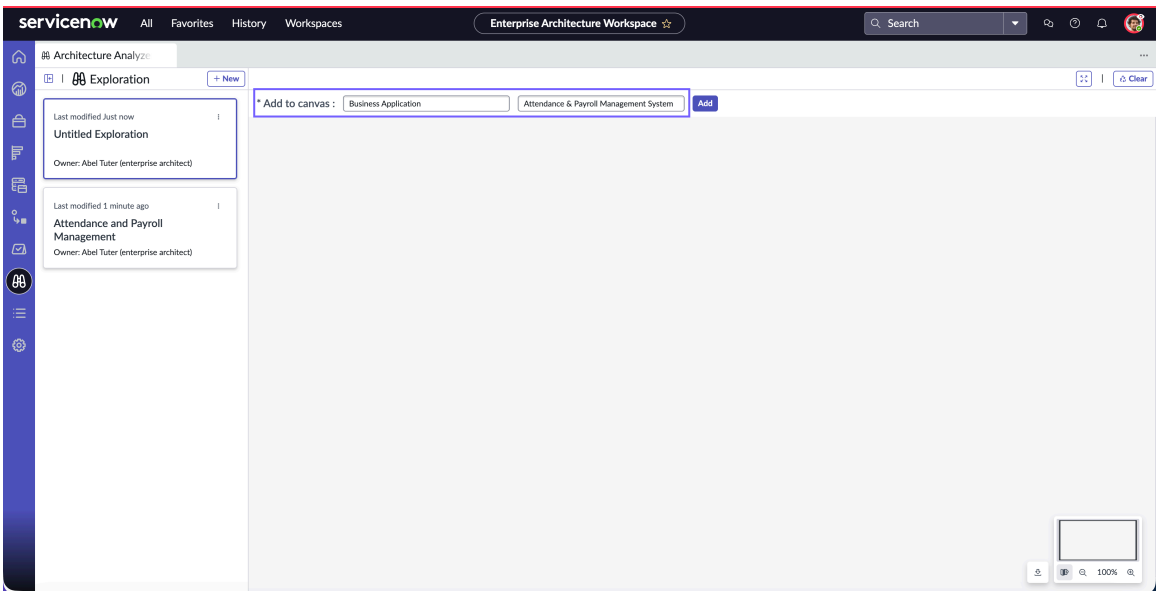
1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Architecture Analyzer page by selecting the architecture analyzer icon ( ).
3. Select **New** or select **+ New exploration**.
   An untitled exploration with an empty canvas is created.



Note:

- You can double click an existing exploration and then select **+ New exploration** to createn an exploration.
- You can select an existing exploration to view the details.

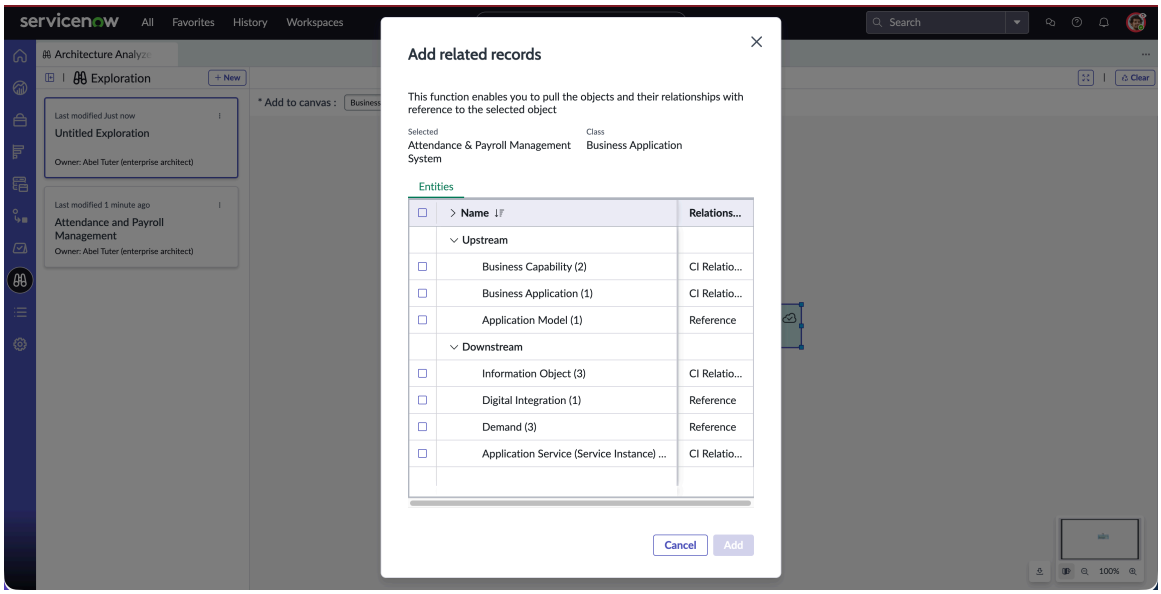
4. To add an entity to the canvas, perform the following:
   a. Select the first **Add to canvas** box and then select the relevant entity.
   b. Select the second box and then select the specific entity that you want to explore.



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5. Select **Add**.
   The selected entity is displayed on the canvas.

6. Select the added entity and then select the add related records icon ( ).
   The **Add related records** pop-up window appears.



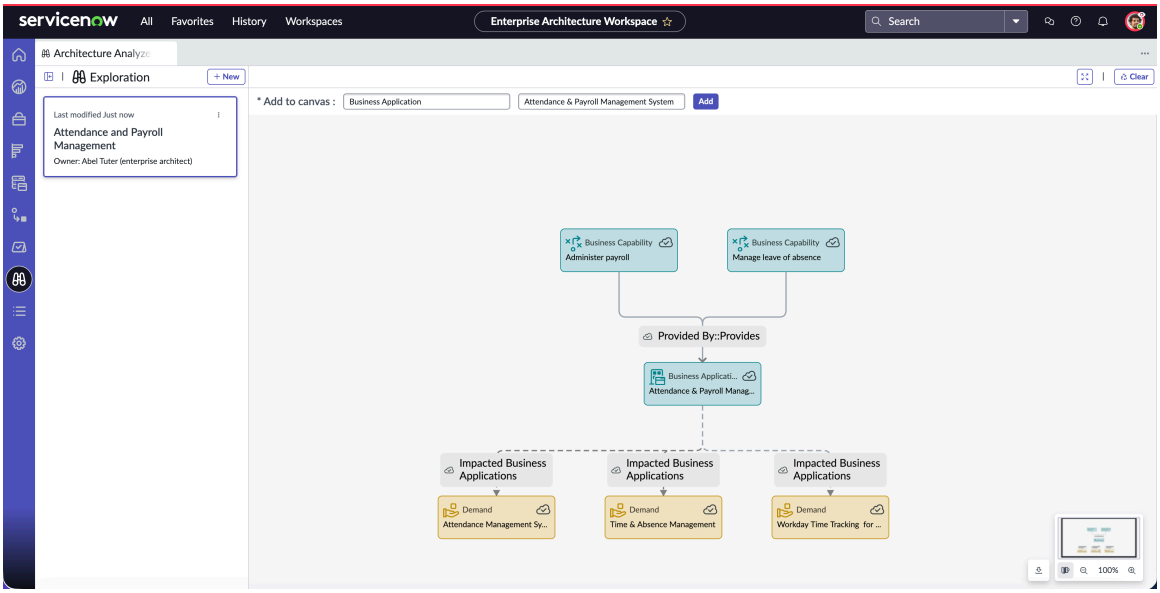
7. Select the entities that you want to add.

   - Select the Expand row icon ( ) next to **Upstream** or **Downstream** to view the list of available related entities.
   - Select the check box next to the relevant entity.

   Note: If an entity has no associated upstream or downstream entities, the **Add related records** pop-up window displays no related entities.

8. Select **Add**.
   The selected entities are added to the diagram for the original entity.

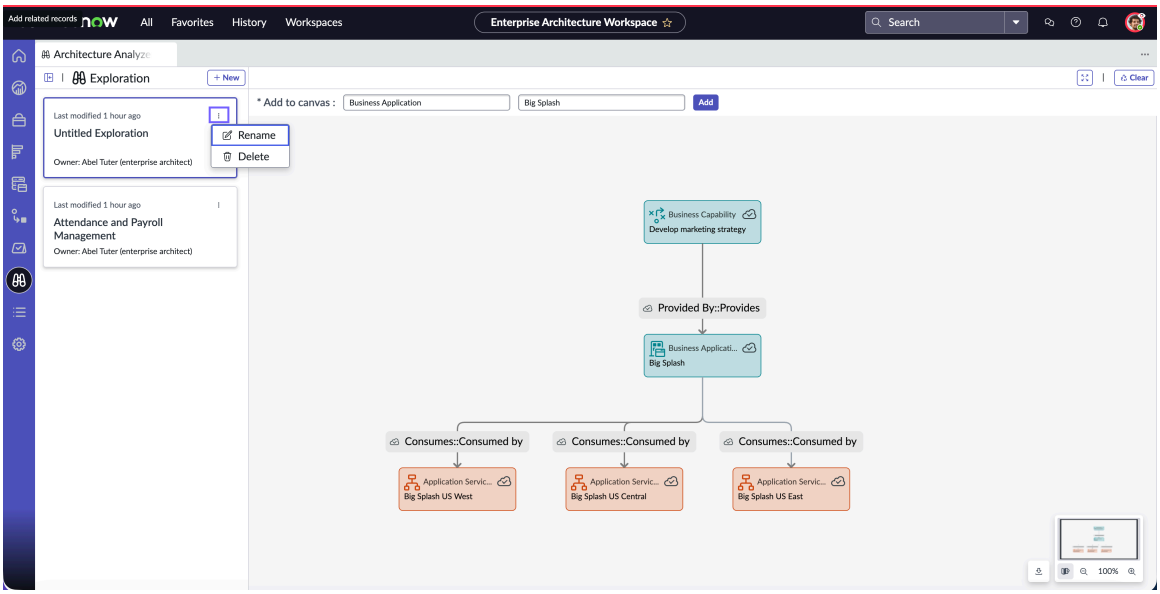
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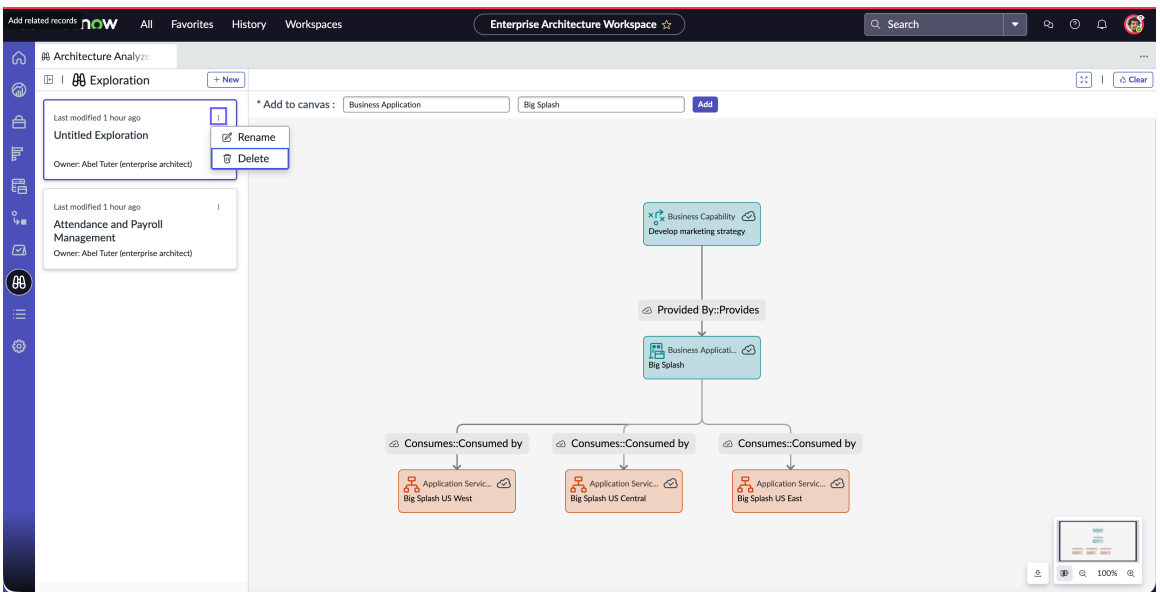
Note:

- To rename an exploration, select the more actions icon (⋮) and then select **Rename**.



- To remove an exploration, perform the following:

  a. Select the more actions icon (⋮) and then select **Delete**.



  b. In the **Delete** pop-up window, select **Delete**. The exploration is permanently deleted.

Related topics

Exploring the architecture analyzer

Working with Portfolio list view

Manage your business architecture, application portfolio, information portfolio and manage all your own entities form the portfolio list view of the Enterprise Architecture Workspace.

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Note: You can zoom on this page or any of the child pages to 200% or 400% through your browser settings without the loss of content or functionality. Page layouts are transformed into a vertical, stacked view automatically.

Create my list

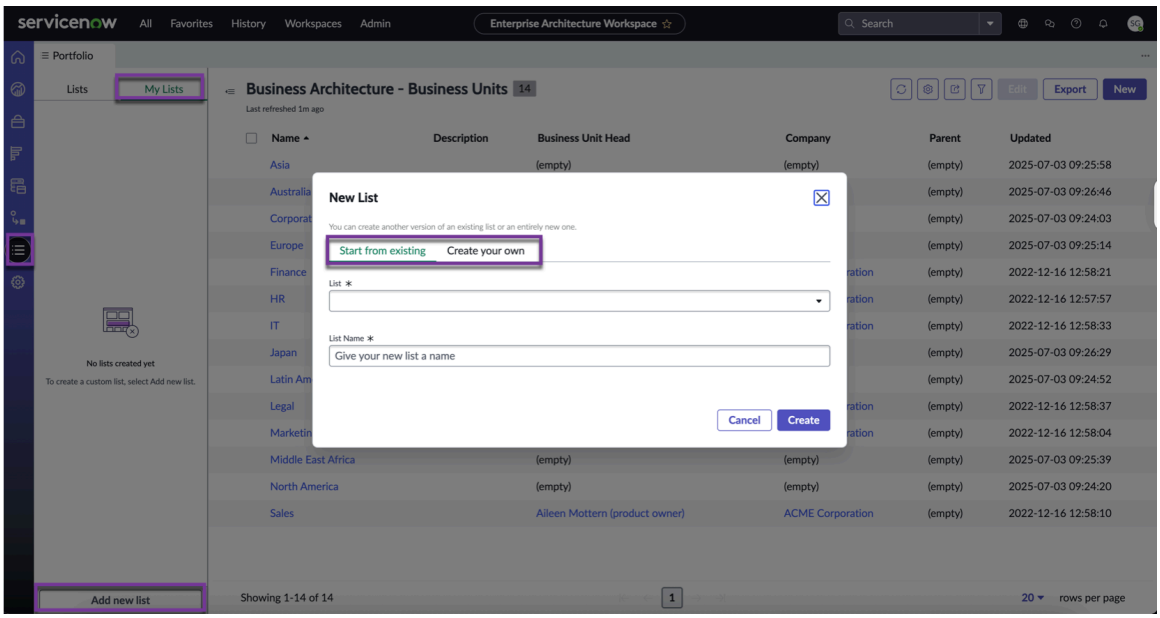
Create your own filtered lists in the Enterprise Architecture Workspace and access them under the **My Lists** tab.

Before you begin

Role required: sn_apm.apm_analyst

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Portfolio List view by selecting the Portfolio icon .
3. Select **My Lists**.
4. Select **Add New list**.



5. Create a new list that is either from an existing list or is new.
   - If creating a list from an existing list, then select **Start from existing** and fill in the fields on the form.

List form

Field	Description
List	Existing list that you want to modify. The menu displays all available admin-defined lists for selection.
List Name	Enter a name for your list as it appears under **My Lists**. By default this field appends the following code to the list selected in the previous menu: `_Copy` .

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Field	Description
Select columns	Choose which fields appear as columns in the list. You can add or remove columns as needed.
Add Filters	Add conditions to narrow which records appear in the list. The selected list's existing conditions are shown by default. For details, see Filter conditions.

- If you are creating a list from nothing, then select **Create your own** and fill in the fields on the form.

List form

Field	Description
List Name	Enter a name for your list as it appears under **My Lists**.
Select Source	Select the table that provides the records for this list.
Select columns	Choose which fields appear as columns. By default, columns are displayed from an existing workspace list view (if available). Otherwise, columns are displayed from the table's default list view.
Add filters	Add conditions to narrow which records appear in the list. For details, see Filter conditions.

6. Select **Create**.

Result
The list appears in the **My Lists** tab.

Using business architecture

Manage business units, departments, goals, value streams, value stream stages, business capabilities, business processes, and demands in the Enterprise Architecture Workspace.

Manage business units

Manage business units in the Enterprise Architecture Workspace to define your organizational functions.

From the Portfolio List view, you can perform the following:

- View all business units
- Add or edit a business unit
- Add a business process to a business unit, or create one directly from the business unit record
- Remove a business process from a business unit
- Add a business capability to a business unit, or create one directly from the business unit record
- Remove a business capability from a business unit

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Related topics

- Exploring business units
- Add a business process to a business unit
- Remove a business process from a business unit
- Add a business capability to a business unit
- Remove a business capability from a business unit

View all business units

You can view the list of all available business units in the Enterprise Architecture Workspace.

Before you begin

Role required: sn_apm.apm_admin or business_planner or pps_admin

Procedure

1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Portfolio List view by selecting the Portfolio icon  .
3. Select the expand row icon ( ) next to **Business Architecture**.
4. Select **Business Units**.

Related topics

- Add or edit a business unit

Add or edit a business unit

Create or edit a business unit to define your organizational functions.

Before you begin

Role required: sn_apm.apm_admin and business_planner

Procedure

1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Portfolio List view by selecting the Portfolio icon  .
3. Select the expand row icon ( ) next to **Business Architecture**.
4. Select **Business Units**.
5. Add or edit a business unit.
   - To add a business unit, select **New**.
   - To update details of an existing business unit, select the business unit.
6. On the form, fill in the fields.
   For field information, see Create a business unit form.
7. Select **Save**.

Related topics

- View all business units

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Add a business process to a business unit

Add existing business processes to a business unit or create a new business process from the business unit record.

Before you begin
Role required: sn_apm.apm_user

Procedure

1. Navigate to **Workspaces** > *Enterprise Architecture Workspace*.
2. Open the Portfolio List view by selecting the Portfolio icon ( ).
3. Select the expand row icon ( ) next to **Business Architecture**.
4. Select **Business Units**.
5. Select the business unit that you want to add a business process to.
6. Select the **Related business processes** tab.
7. Add a business process using one of the following methods.
   - To add an existing business process:
     a. Select **Add**.
     b. In the Add business process window, search for and select the business process.
     c. Select **Add**.
   - To create a business process, select **New** and complete the fields on the form. For field descriptions, see Create business process form.

Result
The business process appears in the **Related business processes** related list for the business unit.

Related topics

Remove a business process from a business unit

View all business units

Remove a business process from a business unit

Remove business processes associated with a business unit in Enterprise Architecture Workspace.

Before you begin
Role required: sn_apm.apm_user

Procedure

1. Navigate to **Workspaces** > *Enterprise Architecture Workspace*.
2. Open the Portfolio List view by selecting the Portfolio icon ( ).
3. Select the expand row icon ( ) next to **Business Architecture**.
4. Select **Business Units**.
5. Select the business unit that you want to remove a business process from.
6. Select the **Related business processes** tab.

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7. Select the check box next to the business process that you want to remove, and select **Remove**.
   A confirmation message appears.
8. Select **Remove**.

Related topics

Add a business process to a business unit

View all business units

Add a business capability to a business unit

Add existing business capabilities to a business unit in Enterprise Architecture Workspace, or create a business capability directly from the business unit record.

Before you begin
Role required: sn_apm.apm_user

Procedure

1. Navigate to **Workspaces** > *Enterprise Architecture Workspace*.
2. Open the Portfolio List view by selecting the Portfolio icon ( ).
3. Select the expand row icon ( ) next to **Business Architecture**.
4. Select **Business Units**.
5. Select the business unit that you want to add a business capability to.
6. Select the **Related business capabilities** tab.
7. Add a business capability using one of the following methods.
   - To add an existing business capability:
     a. Select **Add**.
     b. In the Add business capability window, search for and select the business capability.
     c. Select **Add**.
   - To create a business capability, select **New** and complete the fields on the form. For field descriptions, see Create business capability form.

Result
The business capability appears in the **Related business capabilities** related list for the business unit.

Related topics

Remove a business capability from a business unit

View all business units

Remove a business capability from a business unit

Remove business capabilities associated with a business unit in the Enterprise Architecture Workspace.

Before you begin
Role required: sn_apm.apm_user

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Procedure

1. Navigate to **Workspaces** > *Enterprise Architecture Workspace*.
2. Open the Portfolio List view by selecting the Portfolio icon ().
3. Select the expand row icon ( ) next to **Business Architecture**.
4. Select **Business Units**.
5. Select the business unit that you want to remove a business capability from.
6. Select the **Related business capabilities** tab.
7. Select the check box next to the business capability that you want to remove, and select **Remove**.
   A confirmation message appears.
8. Select **Remove**.

Related topics

Add a business capability to a business unit

View all business units

Manage departments

Add or edit departments, add users to the departments in the Enterprise Architecture Workspace.

Related topics

Exploring departments

View all departments

You can view the list of all available departments in the Enterprise Architecture Workspace.

Before you begin

Role required: sn_apm.apm_user

Procedure

1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Portfolio List view by selecting the Portfolio icon  .
3. Select the expand row icon ( ) next to **Business Architecture**.
4. Select **Departments**.

Related topics

Add or edit a department

Add a user to a department

Add or edit a department

Create or edit departments to manage and optimize business applications and align them with organizational strategic goals.

Before you begin

Role required: user_admin

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Procedure

1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Portfolio List view by selecting the Portfolio icon  .
3. Select the expand row icon ( ) next to **Business Architecture**.
4. Select **Departments**.
5. Add or edit a department.
   - To add a department, select **New**.
   - To update details of an existing department, select the department.
6. On the form, fill in the fields.
   For field information, see Create department form.
7. Select **Save**.

Related topics

View all departments

Add a user to a department

Add a user to a department

You can add users to departments, thereby enabling the departments to perform their specific tasks and reach their desired objectives. Users can contribute to the decision-making process of a department by providing their insights. This leads to optimized usage of business applications and increased cost savings.

Before you begin

Role required: user_admin

Procedure

1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Portfolio List view by selecting the Portfolio icon  .
3. Select the expand row icon ( ) next to **Business Architecture**.
4. Select **Departments**.
5. Select the department that you want to add users to.
   A new page appears and the details of the department are displayed.
6. Select the **Users** tab.
7. On the form, fill in the fields.
   For a description of the field values, see Create user form.
8. Select **Save**.

Related topics

View all departments

Add or edit a department

Manage goals

Manage goals to track and optimize your investments in business applications. Add a quantitative and qualitative targets to the goals in the Enterprise Architecture Workspace.

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Related topics

- Add a goal to a business capability
- Remove a goal from a business capability
- Add a goal to a business process
- Remove a goal from a business process

View all goals

You can view the list of all available goals in the Enterprise Architecture Workspace.

Before you begin

Role required: sn_gf.goal_user_read

Procedure

1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Portfolio List view by selecting the Portfolio icon  .
3. Select the expand row icon ( ) next to **Business Architecture**.
4. Select **Goals**.

Related topics

- Add or edit a goal
- Add a quantitative target to a goal
- Add a qualitative target to a goal
- Create a sub-goal

Add or edit a goal

Create or edit a goal to track and optimize your investments in business applications.

Before you begin

Role required: sn_gf.goal_user

Procedure

1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Portfolio List view by selecting the Portfolio icon  .
3. Select the expand row icon ( ) next to **Business Architecture**.
4. Select **Goals**.
5. Add or edit a goal.
   - To add a goal, select **New**.
   - To update details of an existing goal, select the goal.
6. On the form, fill in the fields.
   For field information, see Create goal form.
7. Select **Save**.

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Related topics

- Add a quantitative target to a goal
- View all goals
- Create a sub-goal
- Add a qualitative target to a goal

Add a quantitative target to a goal

You can add a quantitative target to track the progress of achieving a goal. It's a numbers-based measurable target set to track the performance of a goal.

Before you begin
Role required: sn_gf.goal_user

Procedure

1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Portfolio List view by selecting the Portfolio icon  .
3. Select the expand row icon ( ) next to **Business Architecture**.
4. Select **Goals**.
5. Select the goal that you want to add a quantitative target to.
   A new page appears and the details of the goal are displayed.
6. Select the **Quantitative Targets** tab.
7. Select **New**.
8. On the form, fill in the field.
   For a description of the field values, see Create target form.
9. Select **Save**.

Related topics

- View all goals
- Add or edit a goal
- Create a sub-goal
- Add a qualitative target to a goal

Add a qualitative target to a goal

You can add a qualitative target to track the progress of achieving a goal. It's a non-measurable and interpretation-based target, set to track the performance of a goal.

Before you begin
Role required: sn_gf.goal_user

Procedure

1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Portfolio List view by selecting the Portfolio icon  .
3. Select the expand row icon ( ) next to **Business Architecture**.
4. Select **Goals**.

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5. Select the goal that you want to add a qualitative target to.
   A new page appears and the details of the goal are displayed.
6. Select the **Qualitative Targets** tab.
7. Select **New**.
8. On the form, fill in the field.
   For a description of the field values, see Create target form.
9. Select **Save**.

Related topics

- Add a quantitative target to a goal
- View all goals
- Add or edit a goal
- Create a sub-goal

Create a sub-goal

You can create sub-goals that are associated with your main goals. Sub-goals are more specific in nature and consist of actionable items that contribute to the completion of the parent goal.

Before you begin

Role required: sn_gf.goal_user

Procedure

1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Portfolio List view by selecting the Portfolio icon  .
3. Select the expand row icon ( ) next to **Business Architecture**.
4. Select **Goals**.
5. Select the goal that you want to add a sub-goal to.
   A new page appears and the details of the goal are displayed.
6. Select the **Sub-goals** tab.
7. Select **New**.
8. On the form, fill in the field.
   For a description of the field values, see Create goal form.
9. Select **Save**.

Related topics

- View all goals
- Add or edit a goal
- Add a quantitative target to a goal
- Add a qualitative target to a goal

Add a driver to a goal

You can add existing drivers to a goal in the Enterprise Architecture Workspace, or create a driver directly from the goal record, to identify what influences the goal.

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Before you begin
Role required: sn_apm.apm_user

Procedure
1. Navigate to **Workspaces** > *Enterprise Architecture Workspace*.
2. Open the Portfolio List view by selecting the Portfolio icon ( ).
3. Select the expand row icon ( ) next to **Business Architecture**.
4. Select **Goals**.
5. Select the goal that you want to add a driver to.
6. Select the **Drivers** tab.
7. Add a driver using one of the following methods:
   - To add an existing driver:
     a. Select **Add**.
     b. In the Add driver window, select the driver. A suggested relationship type appears in the **Relationship type** field, but you can select a different type from the list, if needed.
     c. Select **Add**.
   - To create a driver: Select **New** and complete the fields on the form. For descriptions of the fields on the Driver form, see Create a driver form.

Result
The driver appears in the **Drivers** related list for the goal.

Related topics
Remove a driver from a goal

View all goals

Remove a driver from a goal
Remove drivers associated with a goal in Enterprise Architecture Workspace.

Before you begin
Role required: sn_apm.apm_user

Procedure
1. Navigate to **Workspaces** > *Enterprise Architecture Workspace*.
2. Open the Portfolio List view by selecting the Portfolio icon ( ).
3. Select the expand row icon ( ) next to **Business Architecture**.
4. Select **Goals**.
5. Select the goal that you want to remove a driver from.
6. Select the **Drivers** tab.
7. Select the check box next to the driver you want to remove, then select **Remove**.
   A confirmation message appears.
8. Select **Remove**.

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Related topics

Add a driver to a goal

View all goals

Add a stakeholder to a goal

Add existing stakeholders to a goal in the Enterprise Architecture Workspace, or create a stakeholder directly from the goal record.

Before you begin
Role required: sn_apm.apm_user

Procedure

1. Navigate to **Workspaces** > *Enterprise Architecture Workspace*.
2. Open the Portfolio List view by selecting the Portfolio icon ().
3. Select the expand row icon ( ) next to **Business Architecture**.
4. Select **Goals**.
5. Select the goal that you want to add a stakeholder to.
6. Select the **Stakeholders** tab.
7. Add a stakeholder using one of the following methods.
   - To add an existing stakeholder:
     a. Select **Add**.
     b. In the Add stakeholder window, select the stakeholder. A suggested relationship type appears in the **Relationship type** field, but you can select a different type from the list, if needed.
     c. Select **Add**.
   - To create a stakeholder, select **New** and complete the fields on the form. For field descriptions, see Create a stakeholder form.

Result
The stakeholder appears in the **Stakeholders** related list for the goal.

Related topics

Remove a stakeholder from a goal

View all goals

Remove a stakeholder from a goal

You can remove the stakeholders associated with a goal in the Enterprise Architecture Workspace.

Before you begin
Role required: sn_apm.apm_user

Procedure

1. Navigate to **Workspaces** > *Enterprise Architecture Workspace*.
2. Open the Portfolio List view by selecting the Portfolio icon ().

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3. Select the expand row icon ( ) next to **Business Architecture**.
4. Select **Goals**.
5. Select the goal that you want to remove a stakeholder from.
6. Select **Stakeholders**.
7. Select the check box next to the stakeholder that you want to remove, and select **Remove**.
   A confirmation message appears.
8. Select **Remove**.

Related topics

Add a stakeholder to a goal

View all goals

Add a business process to a goal

Associate business processes with goals to map how your organization's processes support strategic objectives.

Before you begin

Role required: sn_apm.apm_user

About this task

Link business processes to goals to document which processes contribute to achieving specific strategic objectives. You can add existing business processes or create ones directly from the goal record.

A goal is mapped to a business process using the relationship type **Realizes :: Realized by**.

Procedure

1. Navigate to **Workspaces** > *Enterprise Architecture Workspace*.
2. Open the Portfolio List view by selecting the Portfolio icon ( ).
3. Expand the Business Architecture section by selecting the expand row icon ( ) next to **Business Architecture**.
4. Select **Goals**.
5. Select the goal that you want to add a business process to.
6. Select the **Business processes** tab.
7. Add a business process using one of the following methods.
   - To add an existing business process:
     a. Select **Add**.
     b. In the Add business process window, select the business process. A suggested relationship type appears in the **Relationship type** field, but you can select a different type from the list, if needed.
     c. Select **Add**.
   - To create a business process, select **New** and complete the fields on the form. For field descriptions, see Create business process form.

Result

The business process appears in the **Business processes** related list.

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Related topics

Remove a business process from a goal

View all goals

Remove a business process from a goal

Remove business processes associated with a goal in the Enterprise Architecture Workspace.

Before you begin

Role required: sn_apm.apm_user

Procedure

1. Navigate to **Workspaces** > *Enterprise Architecture Workspace*.
2. Open the Portfolio List view by selecting the Portfolio icon ( ).
3. Select the expand row icon ( ) next to **Business Architecture**.
4. Select **Goals**.
5. Select the goal that you want to remove a business process from.
6. Select the **Business processes** tab.
7. Select the checkbox next to the business process that you want to remove, and select **Remove**.
   A confirmation message appears.
8. Select **Remove**.

Related topics

Add a business process to a goal

View all goals

Add a business capability to a goal

Add existing business capabilities to goals, or create business capabilities directly from goal records.

Before you begin

Role required: sn_apm.apm_user

About this task

A goal is mapped to a business capability using the relationship type **Realizes :: Realized by**.

Procedure

1. Navigate to **Workspaces** > *Enterprise Architecture Workspace*.
2. Open the Portfolio List view by selecting the Portfolio icon ( ).
3. Next to **Business Architecture**, select the expand row icon ( ).
4. Select **Goals**.
5. Select the goal that you want to add a business capability to.
6. Select the **Business capabilities** tab.

> **Note:** If you don't see the **Business capabilities** tab, select **More**.

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7. Add a business capability using one of the following methods.
   - To add an existing business capability:
     a. Select **Add**.
     b. In the Add business capability window, select the business capability. A suggested relationship type appears in the **Relationship type** field, but you can select a different type from the list, if needed.
     c. Select **Add**.
   - To create a business capability, select **New** and complete the fields on the form. For field descriptions, see Create business capability form.

Result
The business capability appears in the **Business capabilities** related list for the goal.

Related topics
Remove a business capability from a goal

View all goals

Remove a business capability from a goal
Remove business capabilities associated with a goal in the Enterprise Architecture Workspace.

Before you begin
Role required: sn_apm.apm_user

Procedure
1. Navigate to **Workspaces** > *Enterprise Architecture Workspace*.
2. Open the Portfolio List view by selecting the Portfolio icon ( ).
3. Select the expand row icon ( ) next to **Business Architecture**.
4. Select **Goals**.
5. Select the goal that you want to remove a business capability from.
6. Select the **Business capabilities** tab.

   Note: If you don't see the **Business capabilities** tab, select **More**.

7. Select the check box next to the business capability that you want to remove, and select **Remove**.
   A confirmation message appears.
8. Select **Remove**.

Related topics
Add a business capability to a goal

View all goals

Manage value streams
A value stream is a high-level representation of the steps an organization takes to deliver value to a customer whether internal or external. These steps are organized into value stream stages, each of which contributes incrementally to the final value delivered.

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Related topics

- Exploring value streams
- Add a stakeholder to a value stream
- Remove a stakeholder from a value stream

View value streams details

You can value stream details in the Enterprise Architecture Workspace.

Before you begin

Role required: sn_apm.apm_user

About this task

The value stream record page displays information on the following:

- Details: The details of the particular value stream record
- Value stream stages: The value stream stages associated with the current value stream. Users with the sn_apm.apm_user role can create new stages from this tab.
- Application models: The application models associated with the value stream

Procedure

1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Portfolio List view by selecting the Portfolio icon  .
3. Select the expand row icon ( ) next to **Business Architecture**.
4. Select **Value Streams**.
5. Select a particular value stream that you want to view details for.
   The Value stream details page appears.
6. Select the **Value Stream Stages** tab to view the value stream stages associated with the value stream.

Note: Select a value stream stage to view more details.

Related topics

- Add or edit a value stream
- Add value stream stages to a value stream
- Associate an application model to a value stream
- Exploring value streams

Add or edit a value stream

Create or edit a value stream to organize and understand the flow of value creation in your organization.

Before you begin

Role required: sn_apm.apm_user

Procedure

1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Portfolio List view by selecting the Portfolio icon  .

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3. Select the expand row icon ( ) next to **Business Architecture**.
4. Select **Value Streams**.
5. Add or edit a value stream.
   - To add a value stream, select **New**.
   - To update details of an existing value stream, select the value stream.
6. On the form, fill in the fields.
   For field information, see Create value stream form.
7. Select **Save**.

Related topics

Add value stream stages to a value stream

Associate an application model to a value stream

View value streams details

Add value stream stages to a value stream

You can add value stream stages to a value stream to break it down into discrete steps. This establishes the foundation for associating business processes and business capabilities with each stage.

Before you begin
Role required: sn_apm.apm_user

Procedure

1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Portfolio List view by selecting the Portfolio icon .
3. Select the expand row icon ( ) next to **Business Architecture**.
4. Select **Value Streams**.
5. Select the value stream that you want to add value stream stages to.
   A new page appears, displaying the details of the value stream.
6. Select the **Value Stream Stages** tab.
7. Select **New**.
8. On the form, fill in the field.
   For a description of the field values, see Create value stream stage form.
9. Select **Save**.

Related topics

View value streams details

Add or edit a value stream

Exploring value streams

Associate an application model to a value stream

You can add an application model to a value stream to better manage your application portfolios. This ensures that any hardware/software investments are tied to the organizational goal and requirement.

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Before you begin
Role required: sn_apm.apm_user

Procedure
1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Portfolio List view by selecting the Portfolio icon  .
3. Select the expand row icon ( ) next to **Business Architecture**.
4. Select **Value Streams**.
5. Select the value stream that you want to add an application model to.
   A new page appears, displaying the details of the value stream.
6. Select the **Applications Model** tab.
7. Select **New**.
8. On the form, fill in the field.
   For a description of the field values, see Create application model form.
9. Select **Save**.

Related topics
View value streams details

Add or edit a value stream

Add value stream stages to a value stream

Add a stakeholder to a value stream

Add existing stakeholders to a value stream in the Enterprise Architecture Workspace to identify who gets value from it. You can also create a stakeholder directly from the value stream record.

Before you begin
Role required: sn_apm.apm_user

Procedure
1. Navigate to **Workspaces** > *Enterprise Architecture Workspace*.
2. Open the Portfolio List view by selecting the Portfolio icon ().
3. Select the expand row icon ( ) next to **Business Architecture**.
4. Select **Value Streams**.
5. Select the value stream that you want to add a stakeholder to.
6. Select the **Stakeholders** tab.
7. Add a stakeholder using one of the following methods.

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- To add an existing stakeholder:
  a. Select **Add**.
  b. In the Add stakeholder window, select the stakeholder. A suggested relationship type appears in the **Relationship type** field, but you can select a different type from the list, if needed.
  c. Select **Add**.
- To create a stakeholder, select **New** and complete the fields on the form. For field descriptions, see Create a stakeholder form.

Result
The stakeholder appears in the **Stakeholders** related list for the value stream.

Related topics
Remove a stakeholder from a value stream

View value streams details

Remove a stakeholder from a value stream

You can remove the stakeholders associated with a value stream in the Enterprise Architecture Workspace.

Before you begin
Role required: sn_apm.apm_user

Procedure
1. Navigate to **Workspaces** > *Enterprise Architecture Workspace*.
2. Open the Portfolio List view by selecting the Portfolio icon ( ).
3. Select the expand row icon ( ) next to **Business Architecture**.
4. Select **Value Streams**.
5. Select the value stream that you want to remove a stakeholder from.
6. Select **Stakeholders**.
7. Select the check box next to the stakeholder that you want to remove, and select **Remove**. A confirmation message appears.
8. Select **Remove**.

Related topics
Add a stakeholder to a value stream

View value streams details

Manage value stream stages

Value stream stages are the building blocks of a value stream, each adding an incremental value. Add or edit value stream stages in the Enterprise Architecture Workspace.

View value stream stage details

You can view the list of all available value streams stages in the Enterprise Architecture Workspace. You can also view and manage the business processes and business capabilities associated with the value stream.

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Before you begin
Role required: sn_apm.apm_user

Procedure
1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Portfolio List view by selecting the Portfolio icon  .
3. Select the expand row icon ( ) next to **Business Architecture**.
4. Select **Value Stream Stages**.
5. Select a particular value stream stage that you want to view details for.
   The Value stream stage details page appears.
6. Select the **Business Process** tab to view the business processes associated with the value stream stage.

   Note: Select a business process to view more details.

7. Select the **Business Capabilities** tab to view the business capabilities associated with the value stream stage.

   Note: Select a business capability to view more details.

Related topics
Add or edit a value stream stage

Exploring value stream stages

Add or edit a value stream stage

Create or edit a value stream stage to improve the efficiency of a value stream and verify each step adds value to the output of the value stream.

Before you begin
Starting from version 4.0.0 of the *Enterprise Architecture Workspace*, the Value stream artifacts (sn_value_stream) plugin is installed along with the *Enterprise Architecture Workspace* plugin.

Role required: sn_apm.apm_user

Procedure
1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Portfolio List view by selecting the Portfolio icon  .
3. Select the expand row icon ( ) next to **Business Architecture**.
4. Select **Value Stream Stages**.
5. Add or edit a value stream stage.
   - To add a value stream stage, select **New**.
   - To update details of an existing value stream stage, select the value stream stage.
6. On the form, fill in the fields.
   For field information, see Create value stream stage form.
7. Select **Save**.

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Related topics

View value stream stage details

Associate a business process with a value stream stage

You can add an existing business process to a value stream stage to map your enterprise architecture workflows to the stages of your value streams. You can also remove associated business processes if they are no longer relevant for the value stream stage.

Before you begin

Role required: sn_apm.apm_user

Procedure

1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Portfolio List view by selecting the Portfolio icon  .
3. Select the expand row icon ( ) next to **Business Architecture**.
4. Select **Value Stream Stages**.
5. Select the value stream stage that you want to add a business process to.
   A new page appears, displaying the details of the value stream stage.
6. Select the **Business Processes** tab.
7. Select **Add**.
8. On the **Add business process** pop-up, select the existing business process that you want to add to the value stream stage.
9. Select **Add**.
   The business process is added to the value stream stage.
10. To remove an associated business process from the value stream stage, select the business process and then select **Remove**.
    The business process is removed from the value stream stage.

Note:

- You can select and remove multiple business processes simultaneously.
- This action just removes the association between the value stream stage and the business process. The business process record isn't deleted from the system.

Related topics

Exploring value stream stages

View value stream stage details

Add or edit a value stream stage

Add or remove business capabilities from a value stream stage

Add or remove business capabilities from a value stream stage

You can add an existing business capability to a value stream stage to map your organizational capabilities to the stages of your value streams. You can also remove associated business capability if they're no longer relevant for the value stream stage.

Before you begin

Role required: sn_apm.apm_user

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Procedure

1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Portfolio List view by selecting the Portfolio icon  .
3. Select the expand row icon ( ) next to **Business Architecture**.
4. Select **Value Stream Stages**.
5. Select the value stream stage that you want to add a business capability to.
   A new page appears, displaying the details of the value stream stage.
6. Select the **Business Capabilities** tab.
7. Select **Add**.
8. On the **Add business capability** pop-up, select the existing business capability that you want to add to the value stream stage.
9. Select **Add**.
   The business capability is added to the value stream stage.
10. To remove an associated business capability from the value stream stage, select the business capability and then select **Remove**.
    The business capability is removed from the value stream stage.

Note:

- You can select and remove multiple business capabilities simultaneously.
- This action just removes the association between the value stream stage and the business capability. The business capability record isn't deleted from the system.

Related topics

Exploring value stream stages

View value stream stage details

Add or edit a value stream stage

Associate a business process with a value stream stage

Manage business capabilities

Add or edit a business capability, sub-capability, and manage architectural artifacts and diagrams of the capabilities in the Enterprise Architecture Workspace.

You can also associate a business capability with the business unit that uses it, and with the goals it realizes:

- Add a business unit to a business capability
- Remove a business unit from a business capability
- Add a goal to a business capability
- Remove a goal from a business capability

Related topics

Exploring product capabilities

Add a business unit to a business capability

Remove a business unit from a business capability

Add a goal to a business capability

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Remove a goal from a business capability

Add a business capability to a goal

Remove a business capability from a goal

View all business capabilities on the Portfolio page

You can view the list of all available capabilities in the Enterprise Architecture Workspace.

Before you begin

Role required: sn_apm.apm_user

Procedure

1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Portfolio List view by selecting the Portfolio icon  .
3. Select the expand row icon ( ) next to **Business Architecture**.
4. Select **Business Capabilities**.
   You can also view the list of capabilities from the Business Portfolio page. For more information, see Exploring a business portfolio.

Related topics

Add or edit a business capability from the Portfolio page

Create a sub-capability from the Portfolio page

Create diagram for a business capability form

Create a Lucidchart diagram for a business capability in the Enterprise Architecture Workspace

Manage architectural artifacts of a business capability

Add a business capability

Create a demand towards achievement of a capability

Update the hierarchy of a business capability

Create a sub-capability

Assign a business application

Unassign a business application from a capability

Delete a capability from the hierarchy

View a roadmap of a business capability

Add or edit a business capability from the Portfolio page

Create or edit a business capability to align your organization's business goals.

Before you begin

Role required: sn_apm.apm_user

Procedure

1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Portfolio List view by selecting the Portfolio icon  .

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3. Select the expand row icon ( ) next to **Business Architecture**.
4. Select **Business Capabilities**.
5. Add or edit a capability.
   - To add a capability, select **New**.
   - To update details of an existing capability, select the capability.
6. On the form, fill in the fields.
   For field information, see Create business capability form.
7. Select **Save**.
   You can also add capabilities from the Business Portfolio page. For more information, see Add a business capability.

Related topics

View all business capabilities on the Portfolio page

Create diagram for a business capability form

Create a Lucidchart diagram for a business capability in the Enterprise Architecture Workspace

Manage architectural artifacts of a business capability

Create a sub-capability from the Portfolio page

Add a business capability

Create a demand towards achievement of a capability

Update the hierarchy of a business capability

Create a sub-capability

Assign a business application

Unassign a business application from a capability

Delete a capability from the hierarchy

View a roadmap of a business capability

Create a sub-capability from the Portfolio page

You can add a sub-capability to a capability.

Before you begin
Role required: sn_apm.apm_user

Procedure

1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Portfolio List view by selecting the Portfolio icon .
3. Select the expand row icon ( ) next to **Business Architecture**.
4. Select **Business Capabilities**.
5. Select the capability that you want to add a sub-capability to.
   A new page appears and the details of the capability are displayed.
6. Select the **Capabilities** tab.
7. Select **New**.

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8. On the form, fill in the field.
   For a description of the field values, see Create business capability form.
9. Select **Save**.
   You can also add a sub-capability from the Business Portfolio page. For more information, see Create a sub-capability.

Related topics

- View all business capabilities on the Portfolio page
- Create diagram for a business capability form
- Add or edit a business capability from the Portfolio page
- Create a Lucidchart diagram for a business capability in the Enterprise Architecture Workspace
- Manage architectural artifacts of a business capability
- Add a business capability
- Create a demand towards achievement of a capability
- Update the hierarchy of a business capability
- Create a sub-capability
- Assign a business application
- Unassign a business application from a capability
- Delete a capability from the hierarchy
- View a roadmap of a business capability

Create a Lucidchart diagram for a business capability in the Enterprise Architecture Workspace

Create a diagram in Lucidchart for your business capability maps and associate it with an architectural artifact.

Before you begin

Ensure the following ServiceNow Store applications are installed:

- Lucidchart Diagramming Spoke [sn_lucdchart_spoke] (v 1.1.1 or later)
- Lucidchart Integration [sn_lcdchart_int] (v 2.3.0 or later)
- Personal Authentication [sn_ihub_personal_auth] (v 27.0.0 or later)

Ensure a connection is established with Lucid. For details, see Create OAuth 2.0 Client in Lucidchart and Create a connection and credential alias for the Lucidchart diagramming spoke.

Role required: Member of the Enterprise Architect group

Procedure

1. Navigate to **Workspace** > *`Enterprise Architecture Workspace`*.
2. Open the Portfolio List view by selecting the Portfolio icon.
3. Select the expand row icon ( ) next to **Business Architecture**.
4. Select **Business Capabilities**.
5. Select a business capability to open it.

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6. Select the more actions menu and select **Create Diagram**.
7. On the Create Diagram form, fill in the fields.

   Note: Use the authorization link on the Create Diagram window, to generate an authentication token and fetch your Lucid folders to save the diagram. Ensure that you have at least one folder created in the My documents folder of your computer.

   For field information, see Create diagram for a business capability form.
8. Select **Create Diagram**.

Result

After a successful submission, a link to the newly created Lucid diagram appears on top of the screen. You can select the link to navigate to the diagram. The Architectural Artifacts page shows the link to the Lucidchart diagram and an artifact name associated with it. You can select the respective link to access the artifact or diagram.

Related topics

- Create diagram for a business capability form
- View all business capabilities on the Portfolio page
- Add or edit a business capability from the Portfolio page
- Manage architectural artifacts of a business capability
- Create a sub-capability from the Portfolio page
- Add a business capability
- Create a demand towards achievement of a capability
- Update the hierarchy of a business capability
- Create a sub-capability
- Assign a business application
- Unassign a business application from a capability
- Delete a capability from the hierarchy
- View a roadmap of a business capability

Manage architectural artifacts of a business capability

You can create new, add, or remove the artifacts that are associated with a business capability.

Before you begin

Role required: sn_apm.apm_user

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Portfolio List view by clicking the Portfolio icon ( ).
3. Select the expand row icon ( ) next to **Business Architecture**.
4. Select **Business Capabilities**.
5. Select the name of a business capability to view the associated artifacts.
6. Select the **Architectural Artifacts** tab.
   A list of artifacts associated with the business capability is displayed.

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7. To link an existing artifact to the business capability, select **Add**.
   In the **Add architectural artifact** pop-up window, select the existing artifact that you want to link to the business capability and select **Ok**.
8. Create or remove an artifact.
   - To create an artifact and associate it with the business capability, select **New**.
   - To remove an existing architectural artifact, select the artifact and then select **Remove**.
9. Fill in the form fields.
   For field information, see Create architectural artifact form.
10. Select **Save**.

Related topics

View all business capabilities on the Portfolio page

Add or edit a business capability from the Portfolio page

Create a sub-capability from the Portfolio page

Create diagram for a business capability form

Create a Lucidchart diagram for a business capability in the Enterprise Architecture Workspace

Add a business capability

Create a demand towards achievement of a capability

Update the hierarchy of a business capability

Create a sub-capability

Assign a business application

Unassign a business application from a capability

Delete a capability from the hierarchy

View a roadmap of a business capability

View value stream stages for a business capability

You can view the value stream stages associated with a business capability to understand which steps in your value stream the business capability supports.

Before you begin

Role required: sn_apm.apm_user

Procedure

1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Portfolio List view by selecting the Portfolio icon  .
3. Select the expand row icon ( ) next to **Business Architecture**.
4. Select **Business Capabilities**.
5. Select the business capability that you want to view the associated value stream stages for.
   The business capability details page appears.
6. Select the **Value Stream Stages** tab.
   The list of value stream stages associated with the business capability is displayed.

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Related topics

- Exploring value stream stages
- Exploring business capabilities
- View value stream stage details
- Add or remove business capabilities from a value stream stage

Add a business unit to a business capability

You can add an existing business unit to a business capability in the Enterprise Architecture Workspace or create a business unit from the business capability.

Before you begin

Role required: sn_apm.apm_user along with cost_transparency_admin or cost_transparency_analyst or business_planner or user_admin

Procedure

1. Navigate to **Workspaces** > *Enterprise Architecture Workspace*.
2. Open the Portfolio List view by selecting the Portfolio icon ().
3. Select the expand row icon ( ) next to **Business Architecture**.
4. Select **Business Capabilities**.
5. Select the business capability that you want to add a business unit to.
6. Select the **Related business units** tab.
7. Add a business unit using one of the following methods.
   - To add an existing business unit:
     a. Select **Add**.
     b. In the Add business unit window, search for and select the business unit.
     c. Select **Add**.
   - To create a business unit, select **New** and complete the fields on the form. For field descriptions, see Create a business unit form.

Result

The business unit appears in the **Related business units** Related list for the business capability.

Related topics

- Remove a business unit from a business capability

Remove a business unit from a business capability

Remove business units associated with a business capability in the Enterprise Architecture Workspace.

Before you begin

Role required: sn_apm.apm_user

Procedure

1. Navigate to **Workspaces** > *Enterprise Architecture Workspace*.
2. Open the Portfolio List view by selecting the Portfolio icon ().

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3. Select the expand row icon ( ) next to **Business Architecture**.
4. Select **Business Capabilities**.
5. Select the business capability that you want to remove a business unit from.
6. Select the **Related business units** tab.
7. Select the checkbox next to the business unit that you want to remove, and select **Remove**.
   A confirmation message appears.
8. Select **Remove**.

Related topics

Add a business unit to a business capability

Add a goal to a business capability

Add existing goals to a business capability in the Enterprise Architecture Workspace, or create a goal directly from the business capability record.

Before you begin

Role required: sn_apm.apm_user

Procedure

1. Navigate to **Workspaces** > *Enterprise Architecture Workspace*.
2. Open the Portfolio List view by selecting the Portfolio icon ( ).
3. Select the expand row icon ( ) next to **Business Architecture**.
4. Select **Business Capabilities**.
5. Select the business capability that you want to add a goal to.
6. Select the **Goals** tab.
7. Add a goal using one of the following methods.
   - To add an existing goal:
     a. Select **Add**.
     b. In the Add goal window, select the goal. A suggested relationship type appears in the **Relationship type** field, but you can select a different type from the list, if needed.
     c. Select **Add**.
   - To create a goal, select **New** and complete the fields on the form. For field descriptions, see Create goal form.

Result

The goal appears in the **Goals** related list.

Related topics

Remove a goal from a business capability

Remove a goal from a business capability

You can remove the goals associated with a business capability in the Enterprise Architecture Workspace.

Before you begin

Role required: sn_apm.apm_user

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Procedure

1. Navigate to **Workspaces** > *Enterprise Architecture Workspace*.
2. Open the Portfolio List view by selecting the Portfolio icon ().
3. Select the expand row icon ( ) next to **Business Architecture**.
4. Select **Business Capabilities**.
5. Select the business capability that you want to remove a goal from.
6. Select the **Goals** tab.
7. Select the check box next to the goal that you want to remove, and select **Remove**.
   A confirmation message appears.
8. Select **Remove**.

Related topics

Add a goal to a business capability

Manage business processes

A business processes is a structured method to organize and manage applications that collectively deliver a specific service—whether internal (example: HR systems) or external (example: customer portals). This process ensures alignment between business capabilities and IT assets, enabling better governance, risk management, and value delivery.

View all business processes

You can view the list of all available business processes in the Enterprise Architecture Workspace.

Before you begin

Role required: business_process_manager or asset or itil or sn_apm.apm_user

Procedure

1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Portfolio List view by selecting the Portfolio icon  .
3. Select the expand row icon ( ) next to **Business Architecture**.
4. Select **Business Processes**.

Related topics

Add or edit a business process

Manage architectural artifacts of a business process

Create a diagram for a business process map

Update a business process map

Add or edit a business process

A Business process is a collection of related, structured activities performed to achieve a specific business outcome. Use business processes to model how your organization operates and to associate the business applications that support those activities.

Before you begin

Role required: business_process_manager or asset or itil or sn_apm.apm_user

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Procedure

1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Portfolio List view by selecting the Portfolio icon  .
3. Select the expand row icon ( ) next to **Business Architecture**.
4. Select **Business Processes**.
5. Add or edit a business process.
   - To add a business process, select **New**.
   - To update details of an existing business process, select the business process.
6. On the form, fill in the fields.
   For field information, see Create business process form.
7. Select **Save**.

Related topics

View all business processes

Manage architectural artifacts of a business process

Create a diagram for a business process map

Update a business process map

Manage architectural artifacts of a business process

You can create new, add, or remove the artifacts that are associated with a business process.

Before you begin

Role required: sn_apm.apm_user

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Portfolio List view by clicking the Portfolio icon ().
3. Select the expand row icon ( ) next to **Business Architecture**.
4. Select **Business Processes**.
5. Select the name of a business process to view the associated artifacts.
6. Select the **Architectural Artifacts** tab.
   A list of artifacts associated with the business process is displayed.
7. To link an existing artifact to the business process, select **Add**.
   In the **Add architectural artifact** modal, select the existing artifact that you want to link to the business process and select **OK**.
8. Create or remove an artifact.
   - To create an artifact and associate it with the business capability, select **New**.
   - To remove an existing architectural artifact, select the artifact and then select **Remove**.
9. Fill in the form fields.
   For field information, see Architectural artifact form.
10. Select **Save**.

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Related topics

- View all business processes
- Add or edit a business process
- Create a diagram for a business process map
- Update a business process map

View value stream stages associated with a business process

You can view the value stream stages associated with a business process to understand which steps in your value stream the business process supports.

Before you begin

Role required: sn_apm.apm_user

Procedure

1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Portfolio List view by selecting the Portfolio icon  .
3. Select the expand row icon ( ) next to **Business Architecture**.
4. Select **Business Processes**.
5. Select the business process that you want to view the associated value stream stages for.
   The business process details page appears.
6. Select the **Value Stream Stages** tab.
   The list of value stream stages associated with the business process is displayed.

Related topics

- Exploring business processes
- Exploring value streams
- Exploring value stream stages
- Associate a business process with a value stream stage

Add a stakeholder to a business process

Add existing stakeholders to a business process or create new stakeholders to identify who is interested in the business process.

Before you begin

Role required: sn_apm.apm_user

Procedure

1. Navigate to **Workspaces** > *Enterprise Architecture Workspace*.
2. Open the Portfolio List view by selecting the Portfolio icon ().
3. Select the expand row icon ( ) next to **Business Architecture**.
4. Select **Business Processes**.
5. Select the business process that you want to add a stakeholder to.
6. Select the **Stakeholders** tab.
7. Add a stakeholder using one of the following methods.

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- To add an existing stakeholder:
  a. Select **Add**.
  b. In the Add stakeholder window, select the stakeholder. A suggested relationship type appears in the **Relationship type** field, but you can select a different type from the list, if needed.
  c. Select **Add**.
- To create a stakeholder, select **New** and complete the fields on the form. For field descriptions, see Create a stakeholder form.

Result
The stakeholder appears in the **Stakeholders** related list for the business process.

Related topics
Remove a stakeholder from a business process

View all business processes

Remove a stakeholder from a business process

You can remove the stakeholders associated with a business process in the Enterprise Architecture Workspace.

Before you begin
Role required: sn_apm.apm_user

Procedure
1. Navigate to **Workspaces** > *Enterprise Architecture Workspace*.
2. Open the Portfolio List view by selecting the Portfolio icon ( ).
3. Select the expand row icon ( ) next to **Business Architecture**.
4. Select **Business Processes**.
5. Select the business process that you want to remove a stakeholder from.
6. Select **Stakeholders**.
7. Select the check box next to the stakeholder that you want to remove, and select **Remove**. A confirmation message appears.
8. Select **Remove**.

Related topics
Add a stakeholder to a business process

View all business processes

Add a business unit to a business process

Add an existing business unit to a business process in Enterprise Architecture Workspace, or create a business unit directly from the business process record.

Before you begin
Role required: sn_apm.apm_user along with cost_transparency_admin or cost_transparency_analyst or business_planner or user_admin

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Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Portfolio List view by selecting the Portfolio icon ().
3. Select the expand row icon ( ) next to **Business Architecture**.
4. Select **Business Processes**.
5. Select the business process that you want to add a business unit to.
6. Select the **Related business units** tab.
7. Add a business unit using one of the following methods.
   - To add an existing business unit:
     a. Select **Add**.
     b. In the Add business unit window, search for and select the business unit.
     c. Select **Add**.
   - To create a business unit, select **New** and complete the fields on the form. For field descriptions, see Create a business unit form.

Result
The business unit appears in the **Related business units** related list.

Related topics

Remove a business unit from a business process

View all business processes

Remove a business unit from a business process

Remove business units associated with a business process in Enterprise Architecture Workspace.

Before you begin
Role required: sn_apm.apm_user

Procedure

1. Navigate to **Workspaces** > *Enterprise Architecture Workspace*.
2. Open the Portfolio List view by selecting the Portfolio icon ().
3. Select the expand row icon ( ) next to **Business Architecture**.
4. Select **Business Processes**.
5. Select the business process that you want to remove a business unit from.
6. Select the **Related business units** tab.
7. Select the check box next to the business unit that you want to remove, and select **Remove**. A confirmation message appears.
8. Select **Remove**.

Related topics

Add a business unit to a business process

View all business processes

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Add a goal to a business process

Add goals to business processes to align process activities with strategic objectives and track performance metrics.

Before you begin
Role required: sn_apm.apm_user

About this task
Link goals to business processes to establish clear connections between operational activities and strategic objectives. You can add existing goals or create new goals directly from the business process record.

Procedure
1. Navigate to **Workspaces** > *Enterprise Architecture Workspace*.
2. Open the Portfolio List view by selecting the Portfolio icon ( ).
3. Select the expand row icon ( ) next to **Business Architecture**.
4. Select **Business Processes**.
5. Select the business process that you want to add a goal to.
6. Select the **Goals** tab.
7. Add a goal using one of the following methods.
   - To add an existing goal:
     a. Select **Add**.
     b. In the Add goal window, select the goal. A suggested relationship type appears in the **Relationship type** field, but you can select a different type from the list, if needed.
     c. Select **Add**.
   - To create a goal, select **New** and complete the fields on the form. For field descriptions, see Create goal form.

Result
The goal appears in the **Goals** related list. You can manage the goal association from this list.

Related topics
Remove a goal from a business process

View all business processes

Remove a goal from a business process

Remove goals associated with a business process in Enterprise Architecture Workspace.

Before you begin
Role required: sn_apm.apm_user

Procedure
1. Navigate to **Workspaces** > *Enterprise Architecture Workspace*.
2. Open the Portfolio List view by selecting the Portfolio icon ( ).
3. Select the expand row icon ( ) next to **Business Architecture**.
4. Select **Business Processes**.

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5. Select the business process that you want to remove a goal from.
6. Select the **Goals** tab.
7. Select the check box next to the goal that you want to remove, and select **Remove**.
   A confirmation message appears.
8. Select **Remove**.

Related topics

Add a goal to a business process

View all business processes

Manage business process activities

Business process activities represent discrete units of work performed by business actors. Use the Portfolio List view to create, edit, and assign business actors to activities.

Business process activities represent the discrete units of work that make up a business process. Each activity can be assigned to one or more business actors who are responsible for performing the work.

From the Portfolio List view, you can perform the following tasks

- View all business process activities
- Create or edit a business process activity
- Assign business actors to activities
- Create business actors directly from an activity record
- Remove business actors from activities

View all business process activities

View the list of all available business process activities in Enterprise Architecture Workspace.

Before you begin
Role required: sn_apm.apm_user

Procedure

1. Navigate to **Workspaces** > *Enterprise Architecture Workspace*.
2. Open the Portfolio List view by selecting the Portfolio icon ().
3. Select the expand row icon ( ) next to **Business Architecture**.
4. Select **Business Process Activities**.

Result
The list of business process activities displays the **Name**, **Description**, **Activity Type**, **Owned by**, and **Managed by group** columns.

Related topics

Add or edit a business process activity

Add or edit a business process activity

Create or edit a business process activity to track a discrete unit of work in your organization.

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Before you begin
Role required: sn_apm.apm_user

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Portfolio List view by selecting the Portfolio icon ().
3. Select the expand row icon ( ) next to **Business Architecture**.
4. Select **Business Process Activities**.
5. Add or edit a business process activity.
   - To add a business process activity, select **New**.
   - To update details of an existing business process activity, select the business process activity, and edit the details in the details page.
6. On the form, fill in the fields.
   For field information, see Create a business process activity form.
7. Select **Save**.

Related topics

View all business process activities

Add a business actor to a business process activity

Add a business actor to a business process activity

You can add an existing business actor to a business process activity in the Enterprise Architecture Workspace, or create a business actor directly from the business process activity record.

Before you begin
Role required: sn_apm.apm_user

Procedure

1. Navigate to **Workspaces** > *Enterprise Architecture Workspace*.
2. Open the Portfolio List view by selecting the Portfolio icon ().
3. Select the expand row icon ( ) next to **Business Architecture**.
4. Select **Business Process Activities**.
5. Select the business process activity that you want to add a business actor to.
6. Select the **Business actors** tab.
7. Add a business actor using one of the following methods.

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- To add an existing business actor:
  a. Select **Add**.
  b. In the Add business actor window, select the business actor. A suggested relationship type appears in the **Relationship type** field, but you can select a different type from the list, if needed.
  c. Select **Add**.
- To create a business actor, select **New** and complete the fields on the form. For field descriptions, see Create a business actor form.

Result
The business actor appears in the **Business actors** related list for the business process activity.

Related topics
Remove a business actor from a business process activity

View all business process activities

Remove a business actor from a business process activity

Remove business actors associated with a business process activity in the Enterprise Architecture Workspace.

Before you begin
Role required: sn_apm.apm_user

Procedure
1. Navigate to **Workspaces** > *Enterprise Architecture Workspace*.
2. Open the Portfolio List view by selecting the Portfolio icon ( ).
3. Select the expand row icon ( ) next to **Business Architecture**.
4. Select **Business Process Activities**.
5. Select the business process activity that you want to remove a business actor from.
6. Select the **Business actors** tab.
7. Select the check box next to the business actor that you want to remove, and select **Remove**. A confirmation message appears.
8. Select **Remove**.

Related topics
Add a business actor to a business process activity

View all business process activities

Manage demands

The structured process of capturing, evaluating, prioritizing, and tracking business demands—such as new applications, enhancements, or rationalization initiatives—across the application lifecycle. It ensures that IT investments align with strategic business goals and that resources are allocated efficiently.

View all demands

You can create or edit a demand as a step to identify cost-saving opportunities on applications or capabilities, to meet the target.

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Before you begin
Role required: sn_apm.apm_user

Procedure
1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Portfolio List view by selecting the Portfolio icon  .
3. Select the expand row icon ( ) next to **Business Architecture**.
4. Select **Demands**.

Related topics
Add or edit a demand

Add or edit a demand
You can create or edit a demand as a step to identify cost-saving opportunities on applications or capabilities, to meet a target.

Before you begin
Role required: sn_apm.apm_user

Procedure
1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Portfolio List view by selecting the Portfolio icon  .
3. Select the expand row icon ( ) next to **Business Architecture**.
4. Select **Demands**.
5. Add or edit a demand.
   - To add a demand, select **New**.
   - To update details of an existing demand, select the demand.
6. On the form, fill in the fields.
   For field information, see Create demand form.
7. Select **Save**.

Related topics
View all demands

Manage business actors
Business actors represent the roles or entities that perform work in your organization. Use the Portfolio List view to create, edit, and manage business actors and their associated business roles.

Business actors represent the people, teams, or organizational units that perform business processes and activities. Each business actor can be assigned one or more business roles that define their responsibilities and capabilities within your enterprise architecture.

Business actors help you:

- Model organizational structure and responsibilities
- Identify who performs specific business processes

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- Analyze resource allocation and workload distribution
- Support impact analysis when organizational changes occur

From the Portfolio List view in the Enterprise Architecture Workspace, you can perform the following tasks:

- View all business actors
- Add or edit a business actor
- Add a business role to a business actor or create a new business role
- Remove a business role from a business actor
- Add a business process activity to a business actor, or create one directly from the business actor record
- Remove a business process activity from a business actor

Related topics

View all business actors

Add or edit a business actor

Add a business process activity to a business actor

Remove a business process activity from a business actor

View all business actors

View all business actors in the Enterprise Architecture Workspace.

Before you begin
Role required: sn_apm.apm_user

Procedure

1. Navigate to **Workspaces** > *Enterprise Architecture Workspace*.
2. Open the Portfolio List view by selecting the Portfolio icon  .
3. Select the expand row icon next to **Business Architecture**.
4. Select **Business Actors**.

Result
The business actors list displays with columns for Name, Department, Description, Group, and Location.

Related topics

Add or edit a business actor

Add or edit a business actor

Create or edit a business actor to define who performs work in your organization.

Before you begin
Role required: sn_apm.apm_user

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Procedure

1. Navigate to **Workspaces** > *Enterprise Architecture Workspace*.
2. Open the Portfolio List view by selecting the Portfolio icon ().
3. Select the expand row icon ( ) next to **Business Architecture**.
4. Select **Business Actors**.
5. Add or edit a business actor.
   - To add a business actor, select **New**.
   - To update details of an existing business actor, select the business actor.

     Note: To edit multiple business actors simultaneously, select the checkboxes next to relevant business actors and then select **Edit**.
6. On the form, fill in the fields.
   For field information, see Business actor form.
7. Select **Save**.

Related topics

View all business actors

Add a business role to a business actor

Add a business role to a business actor

Add existing business roles to a business actor in the Enterprise Architecture Workspace. You can also create a business role directly from the business actor record to identify the responsibilities that the business actor fulfills.

Before you begin

Role required: sn_apm.apm_user

Procedure

1. Navigate to **Workspaces** > *Enterprise Architecture Workspace*.
2. Open the Portfolio List view by selecting the Portfolio icon ().
3. Select the expand row icon ( ) next to **Business Architecture**.
4. Select **Business Actors**.
5. Select the business actor that you want to add a business role to.
6. Select the **Business roles** tab.
7. Add a business role.
   - To add an existing business role:
     a. Select **Add**.
     b. In the Add business role window, select the business role. A suggested relationship type appears in the **Relationship type** field, but you can select a different type from the list, if needed.
     c. Select **Add**.
   - To create a business role, select **New** and fill in the fields on the form. For field information, see Create business role form.

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Result
The business role appears in the **Business roles** related list for the business actor.

Related topics
- Remove business roles from business actors
- View all business actors
- Add or edit a business actor

Remove business roles from business actors

Remove business roles from business actors when organizational responsibilities change or role assignments are no longer needed.

Before you begin
Role required: sn_apm.apm_user

About this task
Removing a business role from a business actor disassociates the role from that actor. The business role itself is not deleted and can be reassigned to other actors.

Procedure
1. Navigate to **Workspaces** > *Enterprise Architecture Workspace*.
2. To open the Portfolio List view, select the Portfolio icon ( ).
3. Select the expand row icon ( ) next to **Business Architecture**.
4. Select **Business Actors**.
5. Select the business actor that you want to remove a business role from.
6. Select the **Business roles** tab.
7. Select the checkbox next to the business role that you want to remove, and select **Remove**.
   A confirmation message appears.
8. Select **Remove**.

Related topics
- Add a business role to a business actor
- View all business actors

Add a business process activity to a business actor

Associate existing business process activities with a business actor, or create activities directly from the business actor record.

Before you begin
Role required: sn_apm.apm_user

About this task
Associating business process activities with business actors documents which roles, departments, or individuals are responsible for specific processes in your enterprise architecture.

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Procedure

1. Navigate to **Workspaces** > *Enterprise Architecture Workspace*.
2. Open the Portfolio List view by selecting the Portfolio icon ().
3. Select the expand row icon ( ) next to **Business Architecture**.
4. Select **Business Actors**.
5. Select the business actor that you want to add a business process activity to.
6. Select the **Business process activities** tab.
7. Add a business process activity using one of the following methods.
   - To add an existing business process activity:
     a. Select **Add**.
     b. In the Add business process activity window, select the business process activity. A suggested relationship type appears in the **Relationship type** field, but you can select a different type from the list, if needed.
     c. Select **Add**.
   - To create a business process activity, select **New** and complete the fields on the form. For field descriptions, see Create a business process activity form.

Result

The business process activity appears in the **Business process activities** related list for the business actor.

Related topics

Remove a business process activity from a business actor

View all business actors

Remove a business process activity from a business actor

Remove business process activities associated with a business actor in the Enterprise Architecture Workspace.

Before you begin

Role required: sn_apm.apm_user

Procedure

1. Navigate to **Workspaces** > *Enterprise Architecture Workspace*.
2. Open the Portfolio List view by selecting the Portfolio icon ().
3. Select the expand row icon ( ) next to **Business Architecture**.
4. Select **Business Actors**.
5. Select the business actor that you want to remove a business process activity from.
6. Select the **Business process activities** tab.
7. Select the check box next to the business process activity that you want to remove, and select **Remove**.
   A confirmation message appears.
8. Select **Remove**.

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Related topics

Add a business process activity to a business actor

View all business actors

Manage business roles

Define responsibilities and reporting hierarchies for business roles in the Enterprise Architecture Workspace.

From the Portfolio List view, you can:

- View all business roles
- Add or edit a business role
- Add a business actor to a business role
- Create a business actor from a business role record
- Remove a business actor from a business role

View all business roles

View all available business roles to understand organizational structure and role relationships in Enterprise Architecture Workspace.

Before you begin

Role required: sn_apm.apm_user

Procedure

1. Navigate to **Workspaces** > *Enterprise Architecture Workspace*.
2. Select the Portfolio icon () to open the Portfolio List view.
3. Select the expand row icon () next to **Business Architecture**.
4. Select **Business Roles**.

Result

The business roles list displays with columns for name, description, department, parent role, group, and required skills. You can select any role to view details or edit its properties.

Related topics

Add or edit a business role

Add or edit a business role

Create or edit a business role to define the responsibilities, rights, and duties associated with performing specific business behavior.

Before you begin

Role required: sn_apm.apm_user

Procedure

1. Navigate to **Workspaces** > *Enterprise Architecture Workspace*.
2. Open the Portfolio List view by selecting the Portfolio icon ().
3. Select the expand row icon () next to **Business Architecture**.

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4. Select **Business Roles**.
5. Add or edit a business role.
   - To add a business role, select **New**.
   - To edit an existing business role, select the business role.

     Note: To edit multiple business roles simultaneously, select the checkboxes next to relevant business roles and then select **Edit**.
6. Fill in the fields on the form.
   For field information, see Create business role form.
7. Select **Save**.

Related topics

View all business roles

Add a business actor to a business role

Add a business actor to a business role

Add existing business actors to a business role to identify who fulfills the role, or create a business actor directly from the business role record.

Before you begin
Role required: sn_apm.apm_user

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Portfolio List view by selecting the Portfolio icon ( ).
3. Select the expand row icon ( ) next to **Business Architecture**.
4. Select **Business Roles**.
5. Select the business role to which you want to add a business actor.
6. Select the **Business actors** tab.
7. Add a business actor.
   - To add an existing business actor:
     a. Select **Add**.
     b. In the Add business actors window, select the business actor. A suggested relationship type appears in the **Relationship type** field, but you can select a different type from the list, if needed.
     c. Select **Add**.
   - To create a business actor, select **New** and complete the fields on the form. For field descriptions, see Business actor form.

Result
The business actor appears in the **Business actors** related list.

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Related topics

- Remove business actors from a business roles
- View all business roles
- Add or edit a business role

Remove business actors from a business roles

You can remove the business actors associated with a business role in the Enterprise Architecture Workspace.

Before you begin

Role required: sn_apm.apm_user

Procedure

1. Navigate to **Workspaces** > *Enterprise Architecture Workspace*.
2. Open the Portfolio List view by selecting the Portfolio icon ( ).
3. Select the expand row icon ( ) next to **Business Architecture**.
4. Select **Business Roles**.
5. Select the business role that you want to remove a business actor from.
6. Select the **Business actors** tab.
7. Select the checkbox next to the business actor that you want to remove, and select **Remove**. A confirmation message appears.
8. Select **Remove**.

Related topics

- Add a business actor to a business role
- View all business roles

Manage drivers

Manage drivers in the Enterprise Architecture Workspace to track the internal and external conditions motivating your organization, and connect them to the stakeholders and goals they influence.

Drivers help you:

- Document the internal and external conditions motivating change in your organization
- Rate each driver's urgency so you can prioritize your response
- Connect drivers to the stakeholders and goals they influence

From the Portfolio List view, you can perform the following:

- View all drivers
- Add or edit a driver
- Add a stakeholder to a driver, or create one directly from the driver record
- Remove a stakeholder from a driver
- Add a goal to a driver, or create one directly from the driver record
- Remove a goal from a driver

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View all drivers

View the list of all available drivers in the Enterprise Architecture Workspace.

Before you begin
Role required: sn_apm.apm_user

Procedure
1. Navigate to **Workspaces** > *Enterprise Architecture Workspace*.
2. Open the Portfolio List view by selecting the Portfolio icon ( ).
3. Select the expand row icon ( ) next to **Business Architecture**.
4. Select **Drivers**.

Result
A list of drivers are displayed. The list includes the following columns: **Name**, **Description**, **Driver type**, **Source**, and **Urgency**.

Related topics
Add or edit a driver

Add or edit a driver

Create or edit a driver to document a condition motivating your organization to define goals and implement changes.

Before you begin
Role required: sn_apm.apm_user

Procedure
1. Navigate to **Workspaces** > *Enterprise Architecture Workspace*.
2. Open the Portfolio List view by selecting the Portfolio icon ( ).
3. Select the expand row icon ( ) next to **Business Architecture**.
4. Select **Drivers**.
5. Add or edit a driver.
   - To add a driver, select **New**.
   - To edit an existing driver, select the driver.

   Note: To edit drivers roles simultaneously, select the checkboxes next to relevant drivers and then select **Edit**.
6. In the form, fill in the fields.
   For field information, see Create a driver form.
7. Select **Save**.

Related topics
View all drivers

Add a stakeholder to a driver

Add goal to driver

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Add a stakeholder to a driver

Add existing stakeholders to a driver or create stakeholders directly from the driver record to identify who the driver influences.

Before you begin
Role required: sn_apm.apm_user

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Portfolio List view by selecting the Portfolio icon ( ).
3. Select the expand row icon ( ) next to **Business Architecture**.
4. Select **Drivers**.
5. Select the driver that you want to add a stakeholder to.
6. Select the **Stakeholders** tab.
7. Add a stakeholder.
   - To add an existing stakeholder:
     a. Select **Add**.
     b. In the Add stakeholder window, select the stakeholder. A suggested relationship type appears in the **Relationship type** field, but you can select a different type from the list, if needed.
     c. Select **Add**.
   - To create a stakeholder: select **New** and complete the form. For field descriptions, see Create a stakeholder form.

Result
The stakeholder appears in the **Stakeholders** related list.

Related topics

Remove a stakeholder from a driver

View all drivers

Remove a stakeholder from a driver

Remove stakeholders associated with a driver in the Enterprise Architecture Workspace.

Before you begin
Role required: sn_apm.apm_user

Procedure

1. Navigate to **Workspaces** > *Enterprise Architecture Workspace*.
2. Open the Portfolio List view by selecting the Portfolio icon ( ).
3. Select the expand row icon ( ) next to **Business Architecture**.
4. Select **Drivers**.
5. Select the driver that you want to remove a stakeholder from.
6. Select the **Stakeholders** tab.

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7. Select the checkbox next to the stakeholder that you want to remove, and select **Remove**. A confirmation message appears.
8. Select **Remove**.

Related topics

Add a stakeholder to a driver

View all drivers

Add goal to driver

Add existing goals to drivers or create goals directly from driver records to identify which goals each driver influences.

Before you begin

Role required: sn_apm.apm_user

About this task

Link goals to drivers to establish relationships between strategic objectives and the factors that influence them. You can add existing goals or create new goals directly from the driver record.

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Portfolio List view by selecting the Portfolio icon ().
3. Select the expand row icon ( ) next to **Business Architecture**.
4. Select **Drivers**.
5. Select the driver to which you want to add a goal.
6. Select the **Goals** tab.
7. Add a goal using one of the following methods.
   - To add an existing goal:
     a. Select **Add**.
     b. In the Add goal window, select the goal. A suggested relationship type appears in the **Relationship type** field, but you can select a different type from the list, if needed.
     c. Select **Add**.
   - To create a goal, select **New** and complete the fields on the form. For field descriptions, see Create goal form.

Result

The goal appears in the Goals related list.

Related topics

Remove a goal from a driver

View all drivers

Remove a goal from a driver

You can remove the goals associated with a driver in the Enterprise Architecture Workspace.

Before you begin

Role required: sn_apm.apm_user

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Procedure

1. Navigate to **Workspaces** > *Enterprise Architecture Workspace*.
2. Open the Portfolio List view by selecting the Portfolio icon ().
3. Select the expand row icon ( ) next to **Business Architecture**.
4. Select **Drivers**.
5. Select the driver that you want to remove a goal from.
6. Select the **Goals** tab.
7. Select the check box next to the goal that you want to remove, and select **Remove**.
   A confirmation message appears.
8. Select **Remove**.

Related topics

Add goal to driver

View all drivers

Manage stakeholders

Manage stakeholders in the Enterprise Architecture Workspace to track who has an interest in your enterprise architecture and connect them to relevant drivers, goals, value streams, and business processes.

Stakeholders help you:

- Track who is interested in or affected by your enterprise architecture
- Rate each stakeholder's influence and interest so you can prioritize engagement
- Connect stakeholders to the drivers, goals, value streams, and business processes they care about

From the Portfolio List view, you can perform the following:

- View all stakeholders
- Add or edit a stakeholder
- Add a driver to a stakeholder, or create one directly from the stakeholder record
- Remove a driver from a stakeholder
- Add a goal to a stakeholder, or create one directly from the stakeholder record
- Remove a goal from a stakeholder
- Add a value stream to a stakeholder, or create one directly from the stakeholder record
- Remove a value stream from a stakeholder
- Add a business process to a stakeholder, or create one directly from the stakeholder record
- Remove a business process from a stakeholder

View all stakeholders

View a comprehensive list of stakeholders to understand their influence and interest levels across your business architecture. This view helps you identify key stakeholders and their organizational relationships.

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Before you begin
Role required: sn_apm.apm_user

Procedure
1. Navigate to **Workspaces** > *Enterprise Architecture Workspace*.
2. Open the Portfolio List view by selecting the Portfolio icon ().
3. Select the expand row icon ( ) next to **Business Architecture**.
4. Select **Stakeholders**.

Result
The list of stakeholders displays the **Name**, **Description**, **Stakeholder type**, **Influence level**, **Interest level**, **Department**, and **Group** columns.

Related topics
Add or edit a stakeholder

Add or edit a stakeholder
Add or edit a stakeholder to track who has an interest in the outcome of your enterprise architecture.

Before you begin
Role required: sn_apm.apm_user

Procedure
1. Navigate to **Workspaces** > *Enterprise Architecture Workspace*.
2. Open the Portfolio List view by selecting the Portfolio icon ().
3. Select the expand row icon ( ) next to **Business Architecture**.
4. Select **Stakeholders**.
5. Add or edit a stakeholder.
   - To add a stakeholder, select **New**.
   - To edit an existing stakeholder, select the stakeholder.
6. Fill in the fields.
   For field descriptions, see Create a stakeholder form.
7. Select **Save**.

Related topics
View all stakeholders

Add a driver to a stakeholder

Add a goal to a stakeholder

Add a value stream to a stakeholder

Add a business process to a stakeholder

Add a value stream to a stakeholder
Associate value streams with stakeholders to track their involvement in business processes. You can add existing value streams or create new ones directly from the stakeholder record.

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Before you begin
Role required: sn_apm.apm_user

Procedure
1. Navigate to **Workspaces** > *Enterprise Architecture Workspace*.
2. Open the Portfolio List view by selecting the Portfolio icon ().
3. Select the expand row icon ( ) next to **Business Architecture**.
4. Select **Stakeholders**.
5. Select the stakeholder that you want to add a value stream to.
6. Select the **Value streams** tab.
7. Add a value stream.
   - To add an existing value stream:
     a. Select **Add**.
     b. In the Add value stream window, select the value stream. A suggested relationship type appears in the **Relationship type** field, but you can select a different type from the list, if needed.
     c. Select **Add**.
   - To create a value stream, select **New**, and fill in the fields on the form. For field information, see Create value stream form.

Result
The value stream appears in the **Value streams** related list for the stakeholder.

Related topics
Remove a value stream from a stakeholder

View all stakeholders

Remove a value stream from a stakeholder
Remove value streams associated with a stakeholder in the Enterprise Architecture Workspace.

Before you begin
Role required: sn_apm.apm_user

Procedure
1. Navigate to **Workspaces** > *Enterprise Architecture Workspace*.
2. Open the Portfolio List view by selecting the Portfolio icon ().
3. Select the expand row icon ( ) next to **Business Architecture**.
4. Select **Stakeholders**.
5. Select the stakeholder that you want to remove a value stream from.
6. Select the **Value streams** tab.
7. Select the check box next to the value stream that you want to remove, and select **Remove**. A confirmation message appears.
8. Select **Remove**.

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Related topics

Add a value stream to a stakeholder

View all stakeholders

Add a driver to a stakeholder

Add existing drivers to stakeholders or create drivers directly from stakeholder records to identify influences.

Before you begin

Role required: sn_apm.apm_user

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Portfolio List view by selecting the Portfolio icon ( ).
3. Select the expand row icon ( ) next to **Business Architecture**.
4. Select **Stakeholders**.
5. Select the stakeholder that you want to add a driver to.
6. Select the **Drivers** tab.
7. Add a driver using one of the following methods.
   - To add an existing driver:
     a. Select **Add**.
     b. In the Add driver window, select the driver and the relationship type between the driver and the stakeholder.
     c. Select **Add**.
   - To create a driver, select **New** and complete the fields on the form. For field descriptions, see Create a driver form.

Result

The driver appears in the Drivers related list for the stakeholder.

Related topics

Remove a driver from a stakeholder

View all stakeholders

Remove a driver from a stakeholder

Remove drivers associated with a stakeholder in the Enterprise Architecture Workspace.

Before you begin

Role required: sn_apm.apm_user

Procedure

1. Navigate to **Workspaces** > *Enterprise Architecture Workspace*.
2. Open the Portfolio List view by selecting the Portfolio icon ( ).
3. Select the expand row icon ( ) next to **Business Architecture**.
4. Select **Stakeholders**.

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5. Select the stakeholder that you want to remove a driver from.
6. Select the **Drivers** tab.
7. Select the check box next to the driver that you want to remove, and select **Remove**.
   A confirmation message appears.
8. Select **Remove**.

Related topics

Add a driver to a stakeholder

View all stakeholders

Add a goal to a stakeholder

Add existing goals to a stakeholder or create a goal directly from the stakeholder record to identify the goals a stakeholder has.

Before you begin
Role required: sn_apm.apm_user

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Portfolio List view by selecting the Portfolio icon ( ).
3. Select the expand row icon ( ) next to **Business Architecture**.
4. Select **Stakeholders**.
5. Select the stakeholder that you want to add a goal to.
6. Select the **Goals** tab.
7. Add a goal using one of the following methods.
   - To add an existing goal:
     a. Select **Add**.
     b. In the Add goal window, select the goal and the relationship type between the goal and the stakeholder.
     c. Select **Add**.
   - To create a goal, select **New** and complete the fields on the form. For field descriptions, see Create goal form.

Result
The goal appears in the **Goals** related list for the stakeholder.

Related topics

Remove a goal from a stakeholder

View all stakeholders

Remove a goal from a stakeholder

Remove goals associated with a stakeholder in the Enterprise Architecture Workspace.

Before you begin
Role required: sn_apm.apm_user

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Procedure

1. Navigate to **Workspaces** > *Enterprise Architecture Workspace*.
2. Open the Portfolio List view by selecting the Portfolio icon ().
3. Select the expand row icon ( ) next to **Business Architecture**.
4. Select **Stakeholders**.
5. Select the stakeholder that you want to remove a goal from.
6. Select the **Goals** tab.
7. Select the check box next to the goal that you want to remove, and select **Remove**.
   A confirmation message appears.
8. Select **Remove**.

Related topics

Add a goal to a stakeholder

View all stakeholders

Add a business process to a stakeholder

Add existing business processes to a stakeholder in the Enterprise Architecture Workspace, or create a business process directly from the stakeholder record.

Before you begin

Role required: sn_apm.apm_user

Procedure

1. Navigate to **Workspaces** > *Enterprise Architecture Workspace*.
2. Open the Portfolio List view by selecting the Portfolio icon ().
3. Select the expand row icon ( ) next to **Business Architecture**.
4. Select **Stakeholders**.
5. Select the stakeholder that you want to add a business process to.
6. Select the **Business processes** tab.
7. Add a business process.
   - To add an existing business process:
     a. Select **Add**.
     b. In the Add business process window, select the business process. A suggested relationship type appears in the **Relationship type** field, but you can select a different type from the list, if needed.
     c. Select **Add**.
   - To create a business process, select **New** and complete the fields on the form. For field information, see Create business process form.

Result

The business process appears in the **Business processes** related list for the stakeholder.

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Related topics

Remove a business process from a stakeholder

View all stakeholders

Remove a business process from a stakeholder

You can remove the business processes associated with a stakeholder in the Enterprise Architecture Workspace.

Before you begin

Role required: sn_apm.apm_user

Procedure

1. Navigate to **Workspaces** > *Enterprise Architecture Workspace*.
2. Open the Portfolio List view by selecting the Portfolio icon ().
3. Select the expand row icon () next to **Business Architecture**.
4. Select **Stakeholders**.
5. Select the stakeholder that you want to remove a business process from.
6. Select the **Business processes** tab.
7. Select the check box next to the business process that you want to remove, and select **Remove**.
   A confirmation message appears.
8. Select **Remove**.

Related topics

Add a business process to a stakeholder

View all stakeholders

Working with an application portfolio

Manage all your business applications, business capabilities, information objects, application services and also, manage their associated architectural artifacts in the Enterprise Architecture Workspace.

Related topics

Working with application Total Cost of Ownership (TCO)

Working with digital integration management in Enterprise Architecture Workspace

View all business applications

View the list of all business applications in the Enterprise Architecture Workspace.

Before you begin

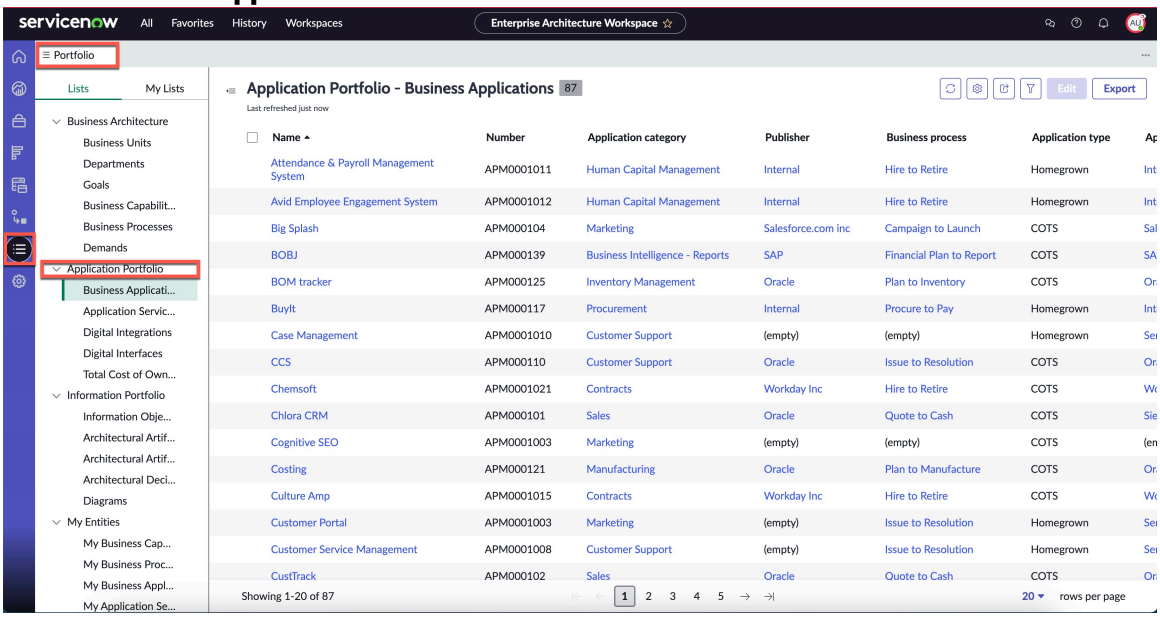
Role required: sn_apm.apm_user

Procedure

1. Navigate to **Workspaces** > *Enterprise Architecture Workspace*.
2. Open the Portfolio List view by selecting the Portfolio icon ().
3. Select the expand row icon () next to **Application Portfolio**.

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4. Select **Business Applications**.



Related topics

- Add or edit a business application
- View business capabilities for a business application
- Add a business capability to a business application
- Remove business capabilities from a business application
- Create a diagram for a business application
- Create a Lucidchart diagram for a business application
- Open business application form in Core UI from EA Workspace
- View a unified map for a business application
- View roadmap of a business application
- Manage information objects in EA Workspace
- View architectural artifacts for a business application
- Associate an architectural artifact with a business app
- Add an architectural artifact to a business application
- Remove architectural artifacts from a business application

Generate insights into business applications

Learn the details of business applications and gather concise and actionable insights on business applications from the summary that is generated by ServiceNow Otto for Enterprise Architecture (EA). The business application insights are context-aware, that is the summary automatically includes relevant information from the specific page where you generate the insights.

Before you begin

Note: Depending on your license, you will have access to certain application features, generative AI skills, agentic workflows, and AI agents. For more information, see ServiceNow product tiers.

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Important: This generative AI skill is turned on by default. The skill will be automatically available to appropriate role users for the application. For more information, see AI agents, skills, and agentic workflows on by default.

You can use Now LLM Service, Azure OpenAI, Google Gemini or Anthropic Claude on AWS as the AI model provider for all generative AI skills and AI agents. Use the Configuration Controls in AI Control Tower to define which options are available, then set the skill-level preferences in the AI Admin Hub console. For more information, see Large language models on the ServiceNow AI Platform.

The default AI model provider for this skill is Azure OpenAI.

Note: Starting with the September 2026 release, Gemma 4 joins our growing portfolio of open-weight models available through Now LLM Service. The latest industry advancements are available alongside sovereignty-focused options. All models are hosted and governed by ServiceNow with the same infrastructure and data protections. Older models will remain available for existing published AI skills, agents, and agentic workflows, but will no longer be available for new development or configuration. For details, see the KB3066214: ServiceNow Otto Model Upgrades article in the Now Support Knowledge Base.

Role required: sn_apm.apm_user

About this task

The business application insights help you to make informed decisions without manually reviewing large volumes of data. The insights help minimize the time that you spend to learn about critical details of business applications like purpose, risk, cost, and recommendations for rationalization.

How the insights are generated depends on the trigger type that your administrator configures for the Business application insights skill. For more information, see Configure ServiceNow Otto for Enterprise Architecture (EA).

- **Automatic**: The insights are generated automatically, without any action from you. When you open a business application record page, the insights are already generated. For example, when you select a business application in the application rationalization bubble chart, the side panel opens on the **Insights** tab. This is the default setting.
- **User trigger**: The insights are generated only when you select **Generate insights**. For example, when you select a business application in the application rationalization bubble chart, the side panel opens on the **Details** tab.

On the Application Rationalization list view page and the Business Portfolio page, the insights aren't generated automatically for either trigger type. To generate insights from these pages, select the View BA Insights icon ( ) next to the business application name.

The business application summary and insights are generated based on certain related fields and related lists. To view the list of fields and related lists based on which the summary and insights are generated, navigate to **All** > *AI Admin Hub* > **AI Skills** > **Technology** > **EA** > **Business application insights** > **View details** > **Edit configuration** > **Choose input**. For more details, see Configure ServiceNow Otto for Enterprise Architecture (EA).

The generated insights automatically include contextual information from the page where you initiate the insight generation. This contextual data is fetched automatically and requires no additional configuration. The following contextual information is displayed depending on the source page:

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- Business Portfolio page
  - Primary capability: The specific capability from which you initiated the insight generation (including hierarchy path and level).
  - Additional capabilities: Other capabilities to which the business application is associated with
  - Cross-capability impact: Information about how the application spans multiple capabilities
  - Indicator scores: Indicator scores associated with that business application
  - Fiscal period: Fiscal period for which you're viewing the business application details for

  Note: If a business application is connected to multiple business capabilities, the summary is different depending on which capability node you use to generate the insights. The capability from which you initiate the insight generation is treated as the primary capability. For example, consider a business application Rewards Engagement System that is connected to three capabilities:

  - Manage Internal Controls
  - Employee Benefits Management
  - Compensation Planning

  If you generate insights from the Manage Internal Controls node in the capability hierarchy, the summary identifies Manage Internal Controls as the primary capability. The summary also mentions that the application is connected to two additional capabilities. The insights focus on how the application supports internal controls, with cross-capability impact.

  If you then navigate to the Employee Benefits Management node and generate insights for the same Rewards Engagement System application, the summary is different.

- Application rationalization bubble chart page
  - Axis information: Which metrics are plotted on the X and Y axes for the business application
  - Quadrant position: Which quadrant the business application is positioned in (for example, top-right quadrant)
  - Bubble size: Metric configured for bubble size
  - Planned disposition: If set for the business application, the insights include the planned disposition value, who set it, when it was set, and the reasoning
  - Fiscal period: Selected fiscal period for which the business application details are displayed
- Application rationalization list view page
  - Indicator scores: All visible indicator scores (both assessed and not assessed)
  - Actual scores: Actual scores, if it's enabled by you
  - Fiscal period: Selected fiscal period for which the business application details are displayed
  - Connected demands: Information about demands to which the application is connected
- Business application details page: When you generate insights from the business application details page (the record page), the insights use only the default configuration fields and lists. No additional contextual data is included. For information on the default configuration, see Configure ServiceNow Otto for Enterprise Architecture (EA).

You can also provide feedback on the business application insights using the thumbs up or thumbs down button. The feedback helps to notify whether the generated business application insights are useful.

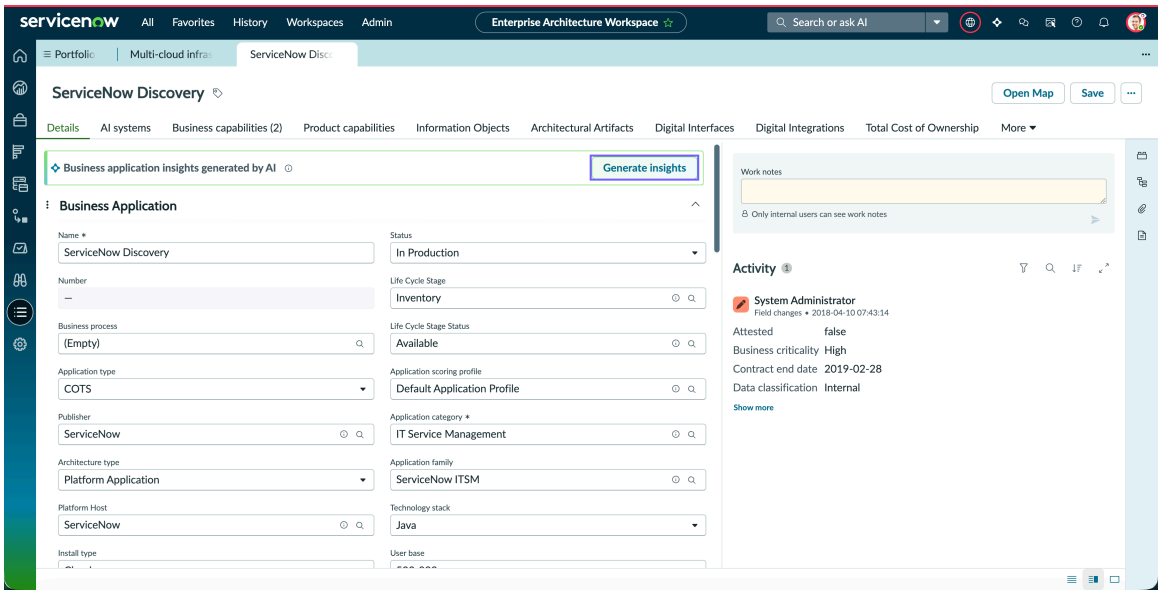
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Procedure

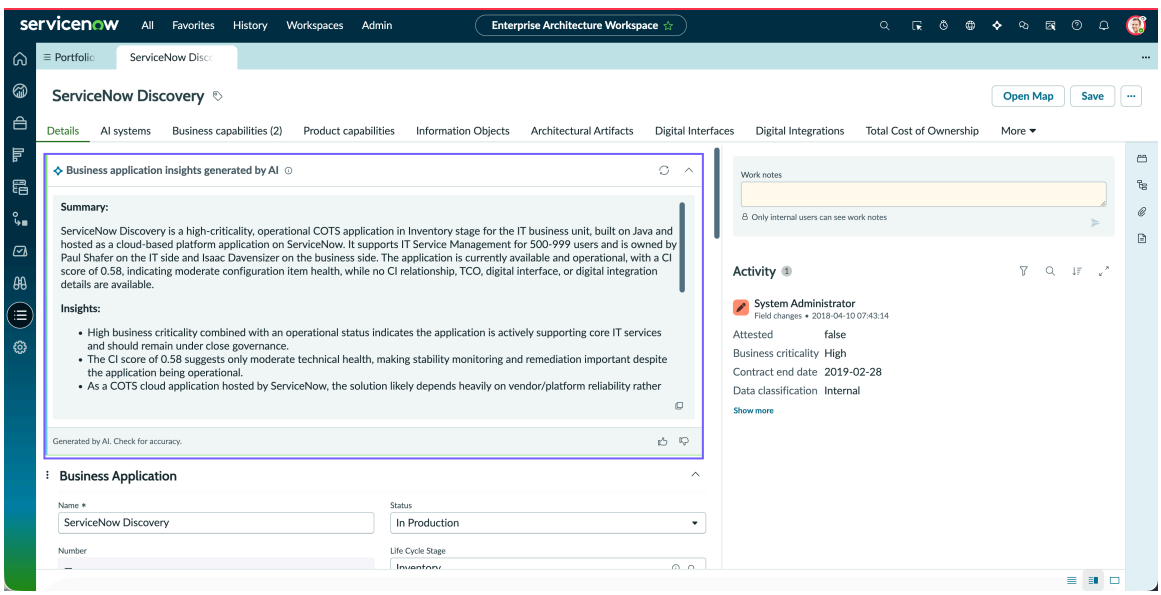
1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Portfolio List view by selecting the Portfolio icon .
3. Select the expand row icon next to **Application Portfolio**.
4. Select **Business Applications**.
5. Select the business application for which you want to generate insights.
6. If the trigger type is set to **User trigger** in the AI Admin Hub, for the skill, select **Generate insights**.

   If the trigger type is set to Automatic, the **Generate insights** button isn't displayed. The insights are already generated when the business application record page opens.

   For information on triggers for this skill, see Configure ServiceNow Otto for Enterprise Architecture (EA).

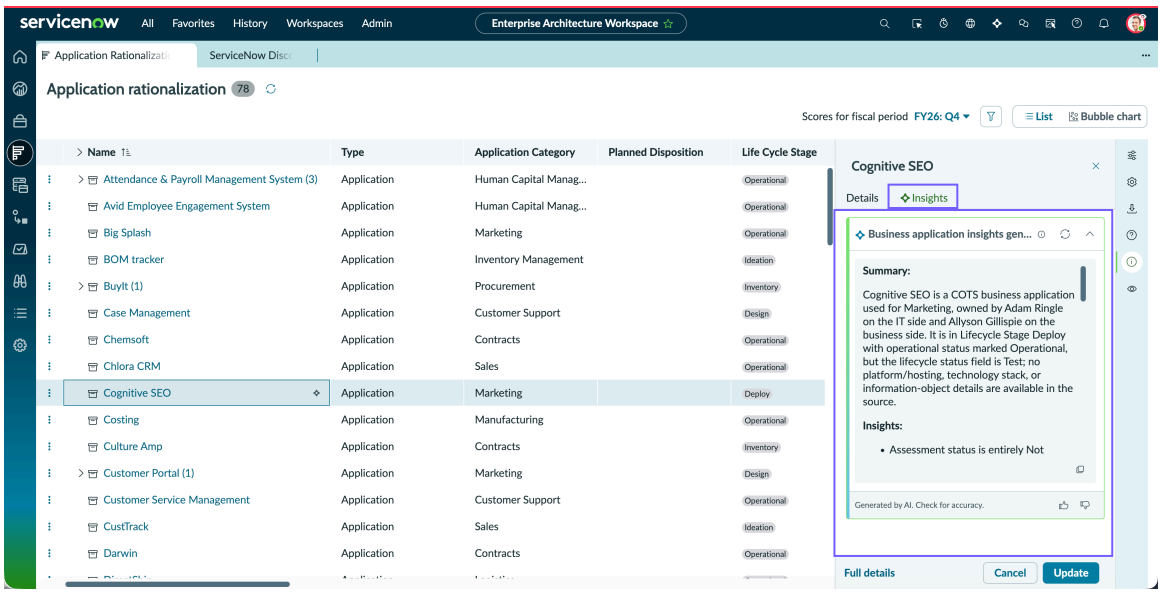


The insights for the business application are generated.

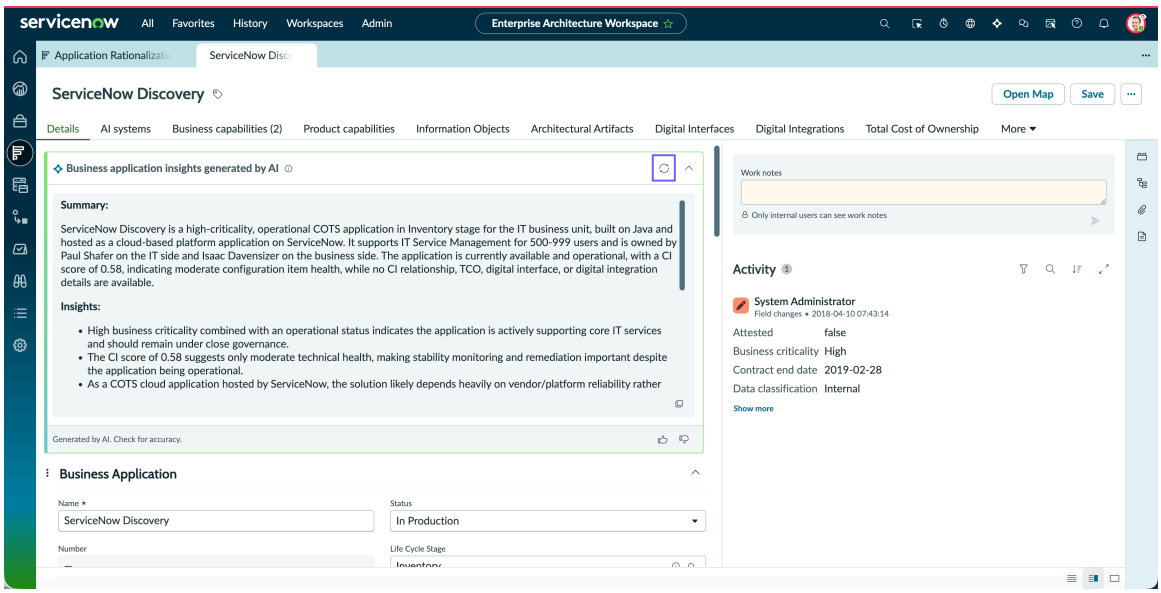


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You can also view insights into a business application wherever business application details are displayed in a side panel, for example of the application rationalization page.



7. Generate a new version of the business application insights by selecting the Refresh icon , in case you changed any details associated with the business application.



Related topics

- Edit business application details in list view
- Rationalization of business applications
- Analyze applications using the bubble chart
- Edit business application details in bubble chart view
- Working with the business portfolio module
- Exploring a business portfolio
- Exploring ServiceNow Otto for Enterprise Architecture (EA)
- Configure ServiceNow Otto for Enterprise Architecture (EA)

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ServiceNow Otto for Enterprise Architecture (EA) access roles

Access Enterprise Architecture data using MCP tools

Register a business application conversationally

Use the conversational experience of ServiceNow Otto in Virtual Agent to register a business application from any application that supports Virtual Agent.

Before you begin

Note: Depending on your license, you will have access to certain application features, generative AI skills, agentic workflows, and AI agents. For more information, see ServiceNow product tiers.

Ensure that the following tasks are completed:

- Install an application that supports Virtual Agent.
- Complete configuring the conversational experiences for Enterprise Architecture. For more information, see Configure ServiceNow Otto for Enterprise Architecture (EA).

Role required: none

About this task

In the application that supports Virtual Agent, for example Employee Service Center, start with a prompt to register a business application in the chat. Through a series of questions, Virtual Agent prompts you to provide information for the questions that you configured for a catalog item. ServiceNow Otto in Virtual Agent understands the context and maps the information that you provide in response to a question to an appropriate catalog item. In this case, the catalog item is a business application.

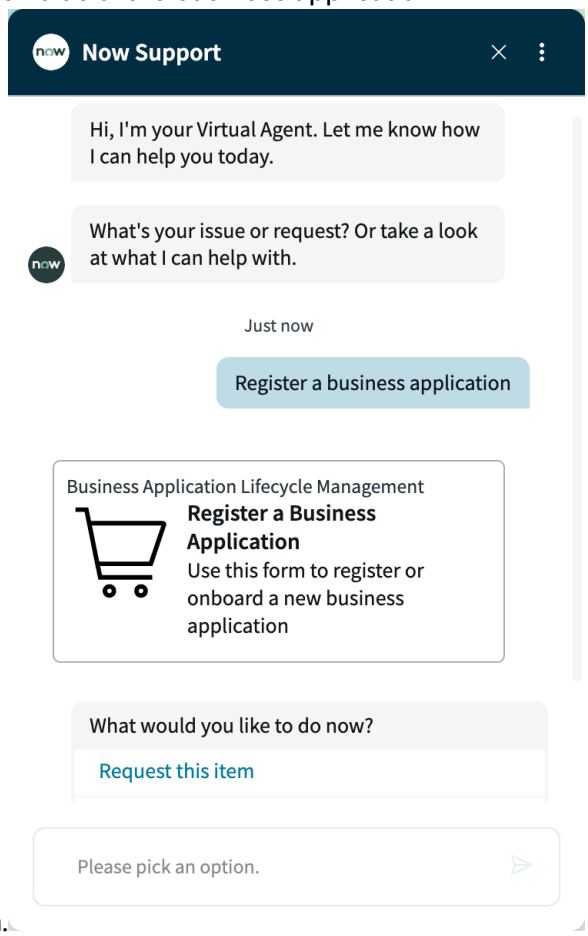
Procedure

1. Navigate to **All** > **Self-Service** > **Employee Center**.
2. Select **Open chat window**.
3. Enter an instruction to start the conversation with Virtual Agent.

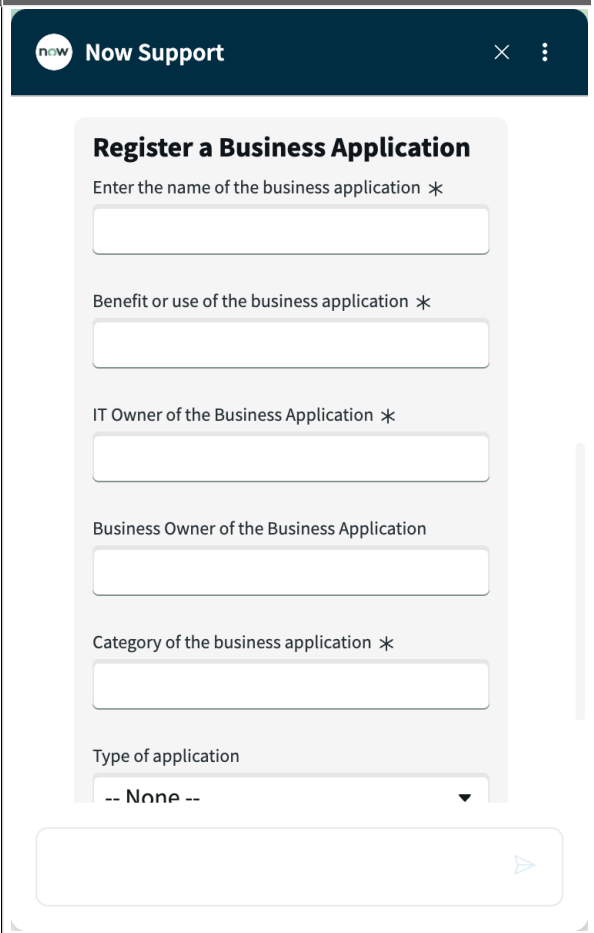
   You can start with a basic instruction such as **Register a business application** or an elaborate instruction that includes the business application's information. The following examples show how each instruction is handled in the chat.

Instruction	Description
Short: Register a business application	Virtual Agent starts a conversation to ask more information from you about the business application, through a series of questions: ○ What is the name of the business application? ○ What is the benefit or use of the business application? ○ Who is the IT owner of the business application? ○ Who is the owner of the business application?

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Instruction	Description
	○ What is the category of the business application? ○ What type of application is this? The information you provide is used to fill in the fields of the business application form. 
Elaborate: Register the new business application XYZ, which is used for capturing application metrics. Specify Abel Tuter as both the business application owner and IT owner. Also, category of the business application is Business Intelligence – Reports and type of application is SaaS.	Using the context that you provided, Virtual Agent automatically matches it to the relevant field on the business application form. It then instructs you to enter information of only those fields that you haven't provided.

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Instruction	Description
	

4. Review the information that Virtual Agent filled in for the business application form fields. You can choose to make changes or submit.

Related topics

Exploring ServiceNow Otto for Enterprise Architecture (EA)

Configure ServiceNow Otto for Enterprise Architecture (EA)

ServiceNow Otto for Enterprise Architecture (EA) access roles

Add or edit a business application

Add the applications that your organization wants to introduce based on their functions and the business processes they fulfill. In Enterprise Architecture, add or edit any business application that is used to assess and track costs, usage, business value, functional fitment, and risks.

Before you begin

Role required: sn_apm.apm_analyst (to add) or sn_apm.apm_user (to update)

About this task

If you have an Enterprise Architecture user role (sn_apm.apm_user), use the Business Application Life-cycle Management services to request, add, retire, approve, or reject a business application.

Note: To approve or reject the requests, you must be part of the Business Application Registration Approval Group.

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Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Portfolio List view by selecting the Portfolio icon ().
3. Select the expand row icon () next to **Application Portfolio**.
4. Select **Business Applications**.
5. Add or edit a business application.
   - To add a business application, select **New**.
   - To update the details of an existing business application, select the record and then select **Edit**.

   Note: You can also generate insights into a business application using Now Assist, by selecting the **Generate Insights** button available in the **Insights** tab on the side panel. For more details, see Generate insights into business applications.

6. On the form, fill in the fields.

   For field information, see Business application form.

7. Select **Save** or **Update**.

Related topics

View roadmap of a business application

View business capabilities for a business application

Manage information objects in EA Workspace

Remove architectural artifacts from a business application

Associate an architectural artifact with a business app

View architectural artifacts for a business application

Remove business capabilities from a business application

Open business application form in Core UI from EA Workspace

View all business applications

View a unified map for a business application

Create a Lucidchart diagram for a business application

Add an architectural artifact to a business application

Create a diagram for a business application

Add a business capability to a business application

View business capabilities for a business application

View business capabilities associated with business applications in the Enterprise Architecture Workspace to understand their value in your enterprise architecture landscape.

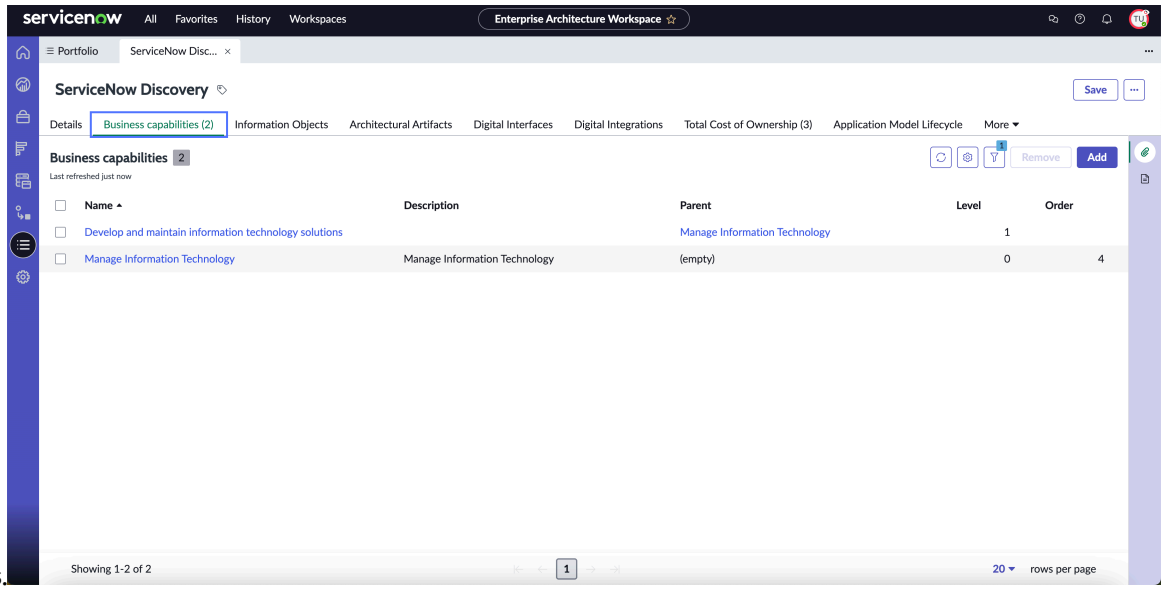
Before you begin

Role required: sn_apm.apm_user

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Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Portfolio List view by selecting the Portfolio icon ( ).
3. Select the expand row icon ( ) next to **Application Portfolio**.
4. Select **Business Applications**.
5. Select the business application that you want to view the business capabilities for.
6. Select **Business capabilities**.



Related topics

- Exploring business capabilities
- View roadmap of a business application
- Add or edit a business application
- Manage information objects in EA Workspace
- Remove architectural artifacts from a business application
- Associate an architectural artifact with a business app
- View architectural artifacts for a business application
- Remove business capabilities from a business application
- Open business application form in Core UI from EA Workspace
- View all business applications
- View a unified map for a business application
- Create a Lucidchart diagram for a business application
- Add an architectural artifact to a business application
- Create a diagram for a business application
- Add a business capability to a business application

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Add a business capability to a business application

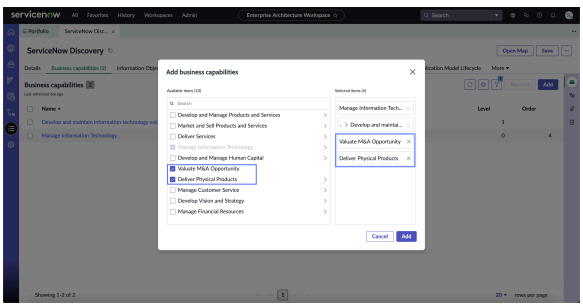
You can add existing business capabilities to business applications in the Enterprise Architecture Workspace, to ensure better alignment with your strategic enterprise architecture goals.

Before you begin

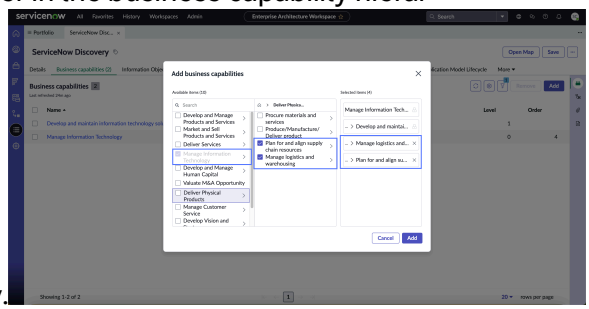
Role required: sn_apm.apm_user

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Portfolio List view by selecting the Portfolio icon ( ).
3. Select the expand row icon ( ) next to **Application Portfolio**.
4. Select **Business Applications**.
5. Select the business application that you want to add existing business capabilities to.
6. Select **Business capabilities**.
7. Select **Add**.
8. In the Add business capabilities window, add the relevant business capabilities or particular sub capabilities.

Options	Steps
Add parent business capabilities to the business application	In the **Available items** box, select the check box next to a business capability to select the business capability along with all its sub capabilities. The selected capabilities are added to the **Selected items** box. You can select multiple parent capabilities. 
Add specific sub capabilities to the business application	**a.** In the **Available items** box, select the open item icon ( ) next to a business capability. **b.** In the sub capabilities box, select the check box next to the sub capability that you want to the business application. You can again select the open item icon ( ) next to a sub-capability to

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Options	Steps
	view more sub-capabilities that are lower in the business capability hierarchy. 

9. Select **Save**.

Related topics

- View roadmap of a business application
- View business capabilities for a business application
- Add or edit a business application
- Manage information objects in EA Workspace
- Remove architectural artifacts from a business application
- Associate an architectural artifact with a business app
- View architectural artifacts for a business application
- Remove business capabilities from a business application
- Open business application form in Core UI from EA Workspace
- View all business applications
- View a unified map for a business application
- Create a Lucidchart diagram for a business application
- Add an architectural artifact to a business application
- Create a diagram for a business application
- View all business capabilities on the Portfolio page

Remove business capabilities from a business application

You can unassign the business capabilities associated with business applications in the Enterprise Architecture Workspace.

Before you begin

Role required: sn_apm.apm_user

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Portfolio List view by selecting the Portfolio icon ( ).
3. Select the expand row icon ( ) next to **Application Portfolio**.
4. Select **Business Applications**.
5. Select the business application that you want to remove the business capabilities for.

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6. Select **Business capabilities**.
7. Select the check box next to the business capability that you want to remove and select **Remove**.
   A confirmation message appears.
8. Select **Remove**.

Related topics

- Remove architectural artifacts from a business application
- View roadmap of a business application
- View business capabilities for a business application
- Add or edit a business application
- Manage information objects in EA Workspace
- Associate an architectural artifact with a business app
- View architectural artifacts for a business application
- Open business application form in Core UI from EA Workspace
- View all business applications
- View a unified map for a business application
- Create a Lucidchart diagram for a business application
- Add an architectural artifact to a business application
- Create a diagram for a business application
- Add a business capability to a business application

Create a diagram for a business application

Create a diagram for your business application hierarchy and associate it with an architectural artifact.

Before you begin

For creating the diagram using the ServiceNow Enterprise Modeling and Visualization, you must activate the following ServiceNow Store applications. For more information, see Exploring Enterprise Modeling and Visualization in the EA Workspace.

- Enterprise Modeling and Visualization (app-modelling-tool)
- Diagram Builder (app-diagram-builder)
- APM Modelling tool Common (app-modelling-tool-common)

For creating the diagram using the Lucidchart, you must activate the following ServiceNow Store applications and establish a connection with Lucid:

- Lucidchart Diagramming Spoke [sn_lucdchart_spoke] (v 1.1.1 or later)
- Lucidchart Integration [sn_lcdchart_int] (v 2.3.0 or later)
- Personal Authentication [sn_ihub_personal_auth] (v 27.0.0 or later)

To establish a connection with Lucid, see Create OAuth 2.0 Client in Lucidchart and Create a connection and credential alias for the Lucidchart diagramming spoke.

Role required: Member of the Enterprise Architect group

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Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace** > **Portfolio**.
2. Select the expand row icon ( ) next to **Application Portfolio**.
3. Select **Business Applications**.
4. Select a business application to open it.
5. Select the more actions menu ( ) and select **Create Diagram**.
6. On the Create Diagram form, fill in the fields.

   For field information, see Create diagram form for a business application.

   Note: For Lucidchart, use the authorization link on the Create Diagram window, to generate an authentication token and fetch your Lucid folders to save the diagram. Ensure that you have at least one folder created in the My documents folder of your computer.

7. Select **Create Diagram**.

Result

After a successful submission, a link to the newly created diagram appears on top of the screen. You can select the link to navigate to the diagram. The Architectural Artifacts page shows the link to the diagram and an artifact name associated with it. You can select the respective link to access the artifact or diagram.

Related topics

- Create a Lucidchart diagram for a business application
- View roadmap of a business application
- View business capabilities for a business application
- Add or edit a business application
- Manage information objects in EA Workspace
- Remove architectural artifacts from a business application
- Associate an architectural artifact with a business app
- View architectural artifacts for a business application
- Remove business capabilities from a business application
- Open business application form in Core UI from EA Workspace
- View all business applications
- View a unified map for a business application
- Add an architectural artifact to a business application
- Add a business capability to a business application

Create a Lucidchart diagram for a business application

Create a diagram Lucidchart for your business application hierarchy and associate it with an architectural artifact.

Before you begin

Ensure the following ServiceNow Store apps are installed:

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- Lucidchart Diagramming Spoke [sn_lucdchart_spoke] (v 1.1.1 or later)
- Lucidchart Integration [sn_lcdchart_int] (v 2.3.0 or later)
- Personal Authentication [sn_ihub_personal_auth] (v 27.0.0 or later)

Ensure a connection is established with Lucid. For details, see Create OAuth 2.0 Client in Lucidchart and Create a connection and credential alias for the Lucidchart diagramming spoke.

Role required: Member of the Enterprise Architect group

Procedure

1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Portfolio List view by selecting the Portfolio icon.
3. Select the expand row icon ( ) next to **Business Applications**.
4. Select a business application to open it.
5. Select the more actions menu ( ) and select **Create Diagram**.
6. On the Create Diagram form, fill in the fields.

   For field information, see Create a diagram for a business application.

   Note: For Lucidchart, use the authorization link on the Create Diagram window, to generate an authentication token and fetch your Lucid folders to save the diagram. Ensure that you have at least one folder created in the My documents folder of your computer.

7. Select **Create Diagram**.

Result

After a successful submission, a link to the newly created Lucid diagram appears on top of the screen. You can select the link to navigate to the diagram. The Architectural Artifacts page shows the link to the Lucidchart diagram and an artifact name associated with it. You can select the respective link to access the artifact or diagram.

Related topics

Create a diagram for a business application

View roadmap of a business application

View business capabilities for a business application

Add or edit a business application

Manage information objects in EA Workspace

Remove architectural artifacts from a business application

Associate an architectural artifact with a business app

View architectural artifacts for a business application

Remove business capabilities from a business application

Open business application form in Core UI from EA Workspace

View all business applications

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View a unified map for a business application

Add an architectural artifact to a business application

Add a business capability to a business application

Open business application form in Core UI from EA Workspace

Open the business application form in Core UI from the EA Workspace to view and edit the business application form in the Enterprise Architecture view.

Before you begin

Role required: admin

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Portfolio List view by clicking the Portfolio icon ().
3. Select the expand row icon ( ) next to **Application Portfolio**.
4. Select **Business Applications**.
5. Select a business application and open it.
6. Select the more actions icon () and select **View form in** *Core UI*.
   For field information, see Business application form.

Related topics

View a unified map for a business application

View roadmap of a business application

Manage information objects in EA Workspace

View architectural artifacts for a business application

Associate an architectural artifact with a business app

Add an architectural artifact to a business application

Remove architectural artifacts from a business application

Create a Lucidchart diagram for a business application

Create a diagram for a business application

Remove business capabilities from a business application

Add a business capability to a business application

View business capabilities for a business application

Add or edit a business application

View all business applications

Add an existing AI system to a business application

Associate an existing AI Control Tower AI system with a business application from the Enterprise Architecture Workspace.

Before you begin

https://service-now.portal.trainn.co/share/0jgAJyxX5eEje8c5R5usvQ/embed?autoplay=false

Role required:

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- To add an existing AI system to a business application: sn_apm.apm_user
- To view the AI system details in the AI Control Tower: sn_aig.ai_steward or sn_aig.ai_asset_owner

About this task

This task adds an existing AI system from AI Control Tower to a business application record.

You can also add a business application to a new AI System. For information, see Request an AI use case form.

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Portfolio List view by selecting the Portfolio icon ().
3. Select the expand row icon ( ) next to **Application Portfolio**.
4. Select **Business Applications**.
5. Select the business application that you want to add existing AI systems to.
6. Select the **AI systems**.
7. In the **Managed** or **Unmanaged** section, select **Add**.

   The **Add AI system** pop-up window appears.

   Note:

   - **Managed** AI systems are AI systems that an AI Steward has reviewed or is under review. Managed systems are actively governed and tracked through their lifecycle in AI Control Tower.
   - **Unmanaged** AI systems are AI systems created in AI Control Tower that have not yet been submitted for AI Steward review and have not entered the governance lifecycle.

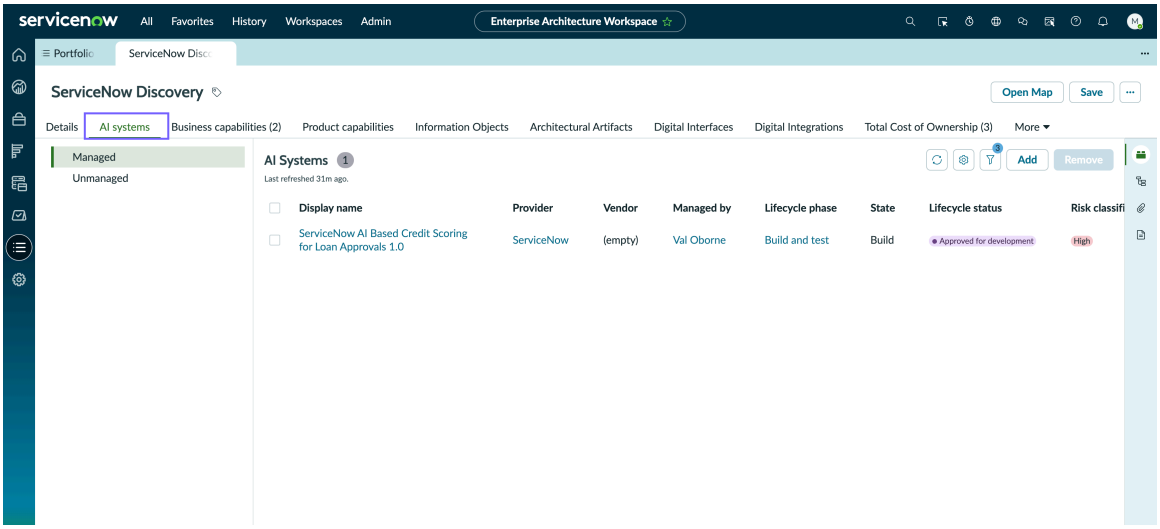
8. In the search field, type the name of the AI system and select it from the results.

   AI systems already associated with this business application do not appear in the search results.

9. Select **Add**.

   The AI system appears in the **AI systems** tab.

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The association also appears under **Workspaces** > **AI Control Tower** > **AI Assets** > **AI systems** > **Select an AI system** > **Details** > **Business applications**.

Related topics

AI Control Tower integration with Enterprise Architecture

AI Control Tower Home

View AI system details from a business application

You can open an AI system record in the AI Control Tower Workspace directly from the **AI Systems** tab on a business application record in the Enterprise Architecture Workspace.

Before you begin

Role required:

- To view the AI systems associated with business application: sn_apm.apm_user
- To view the full AI system record in AI Control Tower: sn_aig.ai_steward or sn_aig.ai_asset_owner

About this task

The **AI Systems** tab on a business application record shows a summary of each associated AI system, including its lifecycle phase, state, lifecycle status, and risk classification. You can open the full AI system record in the AI Control Tower workspace to review complete governance details. These details include related models, datasets, prompts, approval history, and lifecycle tasks.

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Portfolio List view by selecting the Portfolio icon ( ).
3. Select the Expand row icon ( ) next to **Application Portfolio**.
4. Select a business application.
5. Select **AI systems**.
6. In the **Managed** or **Unmanaged** section, select the display name of the AI system you want to view details for.

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The AI system record opens in the AI Control Tower workspace, displaying the full governance details for that AI system. The record includes tabs for details, KPIs and metrics, and requests. Related assets include sub AI systems, AI models, tools, prompts, evaluation datasets, and business applications.

Related topics

Add an existing AI system to a business application

Remove an AI system from a business application

AI Control Tower integration with Enterprise Architecture

AI Control Tower Home

Remove an AI system from a business application

You can remove an AI system from a business application record in the Enterprise Architecture Workspace.

Before you begin

Role required:

- To remove an existing AI system from a business application: sn_apm.apm_user
- To view the AI system details in the AI Control Tower: sn_aig.ai_steward or sn_aig.ai_asset_owner

About this task

Removing an AI system from a business application removes only the association. The AI system record in AI Control Tower is not deleted.

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Portfolio List view by selecting the Portfolio icon ().
3. Select the Expand row icon ( ) next to **Application Portfolio**.
4. Select the business application that you want to remove the AI systems for.
5. Select **AI systems**.
6. Select the check box next to the AI systems that you want to remove and select **Remove**.
   You can select multiple check boxes.
   A confirmation message appears.
7. Select **Remove**.

   The selected AI systems are removed from the **AI systems** tab.

Related topics

Add an existing AI system to a business application

AI Control Tower integration with Enterprise Architecture

AI Control Tower Home

View AI system details from a business application

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Run the Migrate BA Product Model Map job

Run this job to migrate existing AI system-to-business application associations to the new Enterprise Architecture for AICT data model after activating the AI Control Tower and Enterprise Architecture integration.

Before you begin
Role required: admin

About this task
This job does not run automatically. This scheduled job is installed with the Enterprise Architecture for AICT plugin. In Enterprise Architecture Workspace versions earlier than 10.1.3, associations between AI systems and business applications were stored in the Enterprise Architecture Workspace map [sn_apm_ws_ba_product_model_map]. In version 10.1.3 and later, they're stored in the Enterprise Architecture for AICT plugin's map [sn_ea_aict_ba_product_model_map]. If you had this integration active before upgrading, the old table retains your existing associations until you run this job.

Procedure
1. Navigate to **All** > **System Definition** > **Scheduled Jobs**.
2. Open the **Migrate BA Product Model Map from EA Workspace** job.
3. Select **Execute Now**.

Result
Your existing AI system-to-business application associations are migrated into the sn_ea_aict_ba_product_model_map table. You can confirm the migration by checking that associations still appear correctly in both Enterprise Architecture Workspace and AI Control Tower.

Related topics
- AI Control Tower integration with Enterprise Architecture
- Components installed with AI Control Tower
- Enterprise Architecture for AICT plugin installation and upgrade considerations

View a unified map for a business application

View a unified map for your business applications in the Enterprise Architecture Workspace to understand the current architecture and associated references.

Before you begin
You can also open the unified map in Enterprise Modeling and Visualization and make modifications.

Verify that the CMDB Workspace plugin (sn_cmdb_ws) (version 4.0.1 or later) is installed.

Role required: sn_apm.apm_user and sn_cmdb_user

About this task
Unified map is a visualization tool that is used to understand the enterprise architecture and its associated references. It provides you with a clear overview of your organization's technology architecture.

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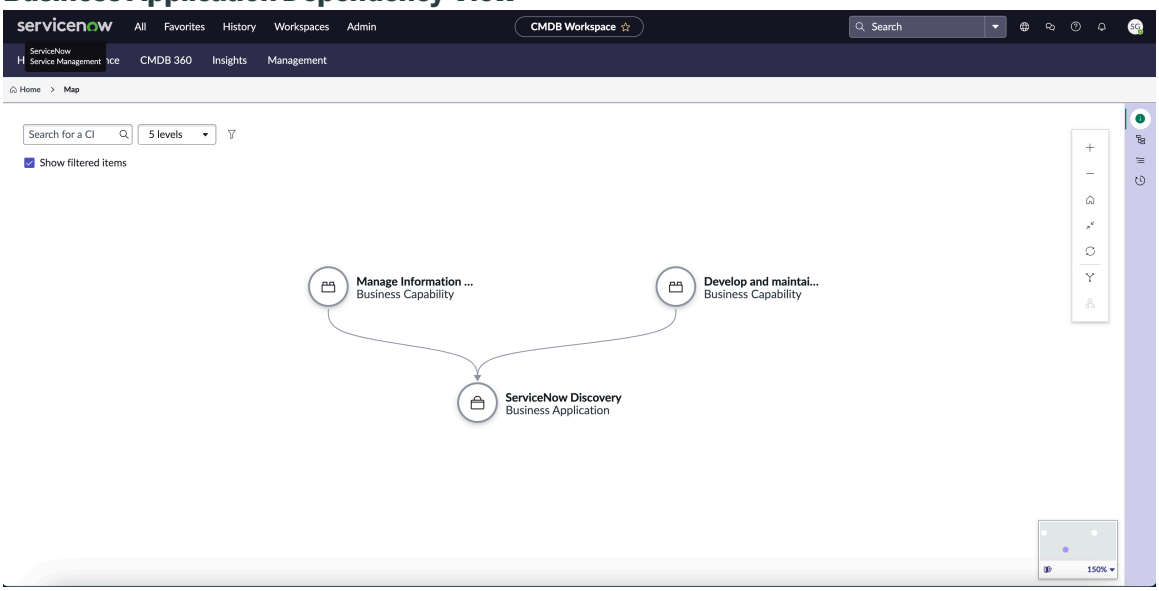
Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Portfolio List view by selecting the Portfolio icon ( ).
3. Select the expand row icon ( ) next to **Application Portfolio**.
4. Select **Business Applications**.
5. Select a business application to open it.
6. Select **Open Map**.

Result

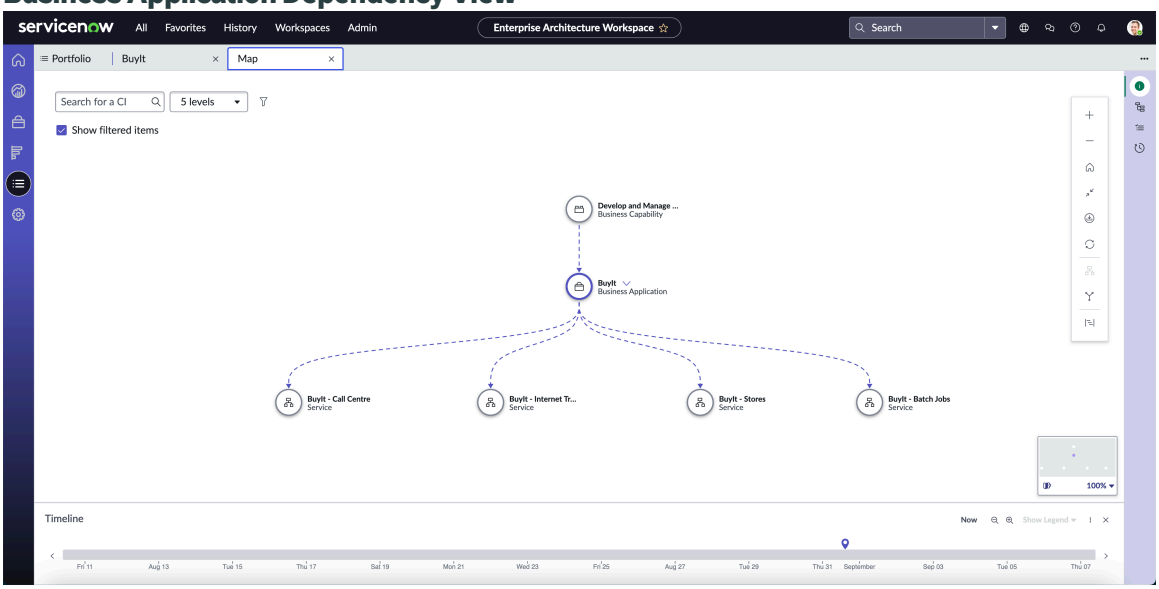
In the EA Workspace version 2.1.1, the unified map for the selected business application is opened in the CMDB Workspace. For more details on the unified map, see Unified Map .

Business Application Dependency View



In the EA Workspace version 2.2.0 or later, the unified map for the selected business application is opened in a new tab within the EA Workspace.

Business Application Dependency View



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Related topics

- View roadmap of a business application
- Manage information objects in EA Workspace
- Associate an architectural artifact with a business app
- Remove architectural artifacts from a business application
- View architectural artifacts for a business application
- Open business application form in Core UI from EA Workspace
- Add an architectural artifact to a business application
- Create a Lucidchart diagram for a business application
- Create a diagram for a business application
- Remove business capabilities from a business application
- Add a business capability to a business application
- View business capabilities for a business application
- Add or edit a business application
- View all business applications

View the unified map for a business application in Enterprise Modeling and Visualization

You can view and model the unified map for your business applications, using Enterprise Modeling and Visualization [com.snc.apm_modelling_tool] functionality in Enterprise Architecture Workspace, you can modify your existing applications hierarchy and associate them with architectural artifacts.

Before you begin

Verify that the CMDB Workspace plugin (sn_cmdb_ws) (version 4.0.1 or later) is installed.

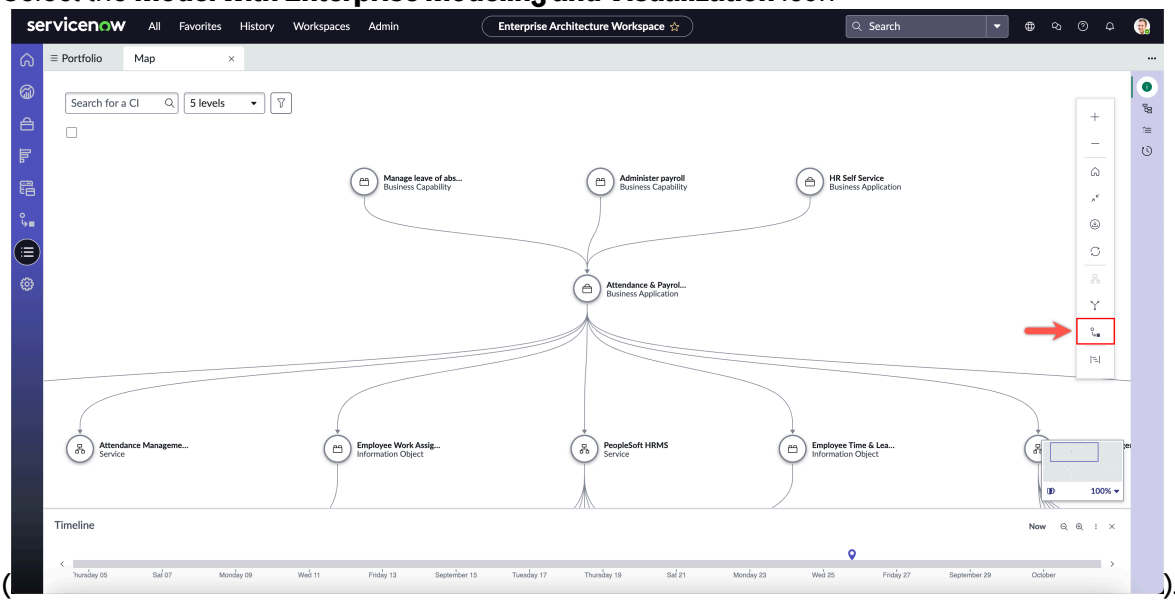
Role required: sn_apm.apm_user and sn_cmdb_user

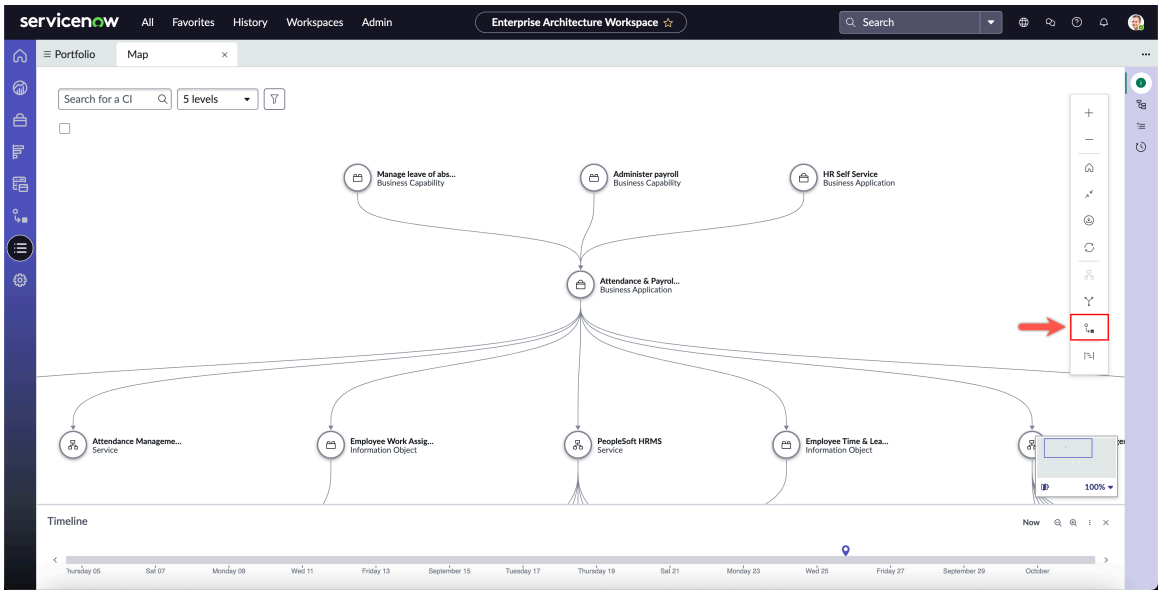
Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Portfolio List view by selecting the Portfolio icon ().
3. Select the expand row icon ( ) next to **Application Portfolio**.
4. Select **Business Applications**.
5. Select a business application to open it.
6. Select **Open Map**.

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7. Select the **Model with Enterprise Modeling and Visualization** icon



(

).

8. On the **Model with Enterprise Modeling and Visualization** pop-up window, fill in the following fields:
   - **Artifact name**: The name of the diagram.
   - **Architectural category**: The category to which the architectural artifact is associated with.
9. Select **OK**.
   To learn more on how to use Enterprise Modeling and Visualization, see Exploring Enterprise Modeling and Visualization in the EA Workspace.

Related topics

Create a diagram for a business capability map

Delete a shape

Add related records in the modeling diagram

Commit diagram changes

Save as a version

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View roadmap of a business application

View the roadmap of your business applications and align them with the organization's strategy. Creating a portfolio plan helps you plan, prioritize, and roadmap the work for your business application.

Before you begin

Ensure that the Strategic Planning plugin (com.sn_apw_advanced) (v4.0.2 or later) is installed.

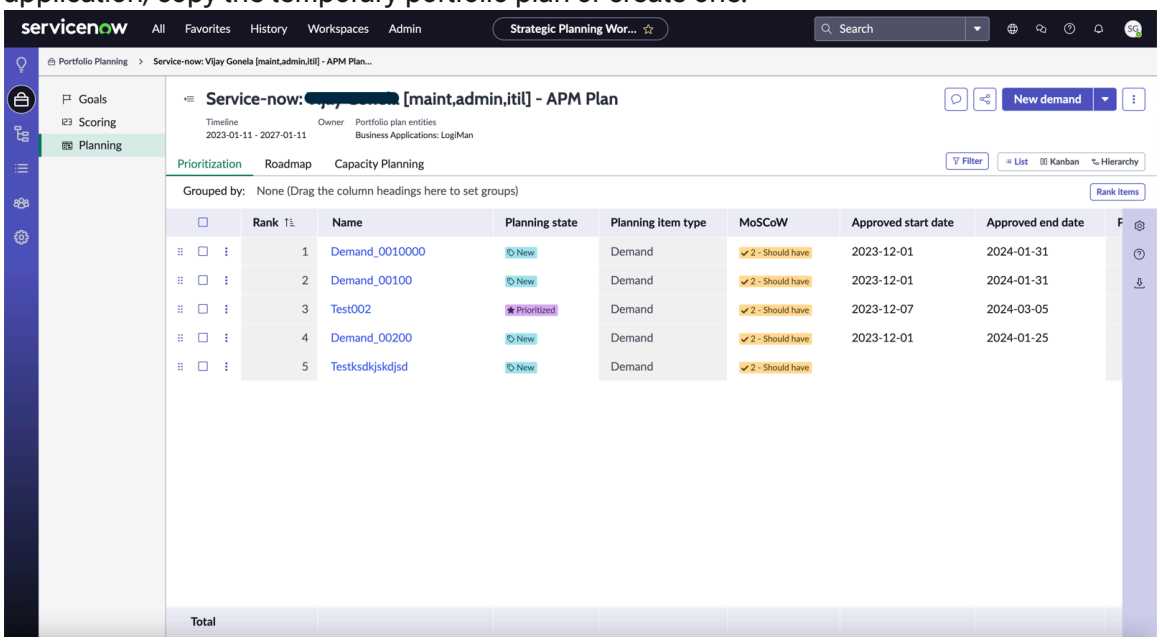
Role required: sn_apm.apm_user and sn_align_core.apw_user

Procedure

1. Open the **View roadmap** option using the following navigation.
   - From the Business Portfolio page:
     a. Navigate to **Workspaces** > **Enterprise Architecture Workspace** > **Business Portfolio**
     b. Select the expand row icon ( ) next to a business capability.
     c. Select the row context menu icon ( ) for a business application and select **View roadmap**.
   - From the Portfolio page:
     a. Navigate to **Workspaces** > **Enterprise Architecture Workspace** > **Portfolio**
     b. Select the expand row icon ( ) next to **Application Portfolio**.
     c. Select#**Business Applications**.
     d. Select a business application to open it.
     e. Select the more actions menu ( ) and select **View roadmap**.

You're navigated to the Planning page of the Strategic Planning Workspace. A temporary portfolio plan is created in the Strategic Planning Workspace with all the planning items that are associated with the business application.

Note: The temporary portfolio plan is meant for preview purpose only. To plan, prioritize, and roadmap the work for your business application, copy the temporary portfolio plan or create one.



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2. **Optional:** Copy the portfolio plan for your business application to plan, prioritize, and roadmap the work for your business application.

   a. From the portfolio plan header, select the more actions icon ( ) and then select **Copy portfolio plan**.

   b. On the Copy portfolio plan window, fill in the details.

      i. Enter a name for the portfolio plan in the **Portfolio plan name** field.

      ii. (Optional) Grant access to the users of the portfolio plan by selecting the **Share with same users and groups** option.

   c. Select **Confirm**.

   Alternatively, you can also create your own portfolio plan in the Strategic Planning Workspace (SPW) using the Business Capability lens. For more information, see Create a portfolio plan.

Related topics

- View a unified map for a business application
- Manage information objects in EA Workspace
- View architectural artifacts for a business application
- Associate an architectural artifact with a business app
- Add an architectural artifact to a business application
- Remove architectural artifacts from a business application
- Open business application form in Core UI from EA Workspace
- Create a Lucidchart diagram for a business application
- Create a diagram for a business application
- Remove business capabilities from a business application
- Add a business capability to a business application
- View business capabilities for a business application
- Add or edit a business application
- View all business applications

View product capabilities for a business application

You can view the list of product capabilities associated with business applications, in the Enterprise Architecture Workspace (EA Workspace).

Before you begin

The Product capabilities tab is displayed only when the Model ID detail is also available for the business application.

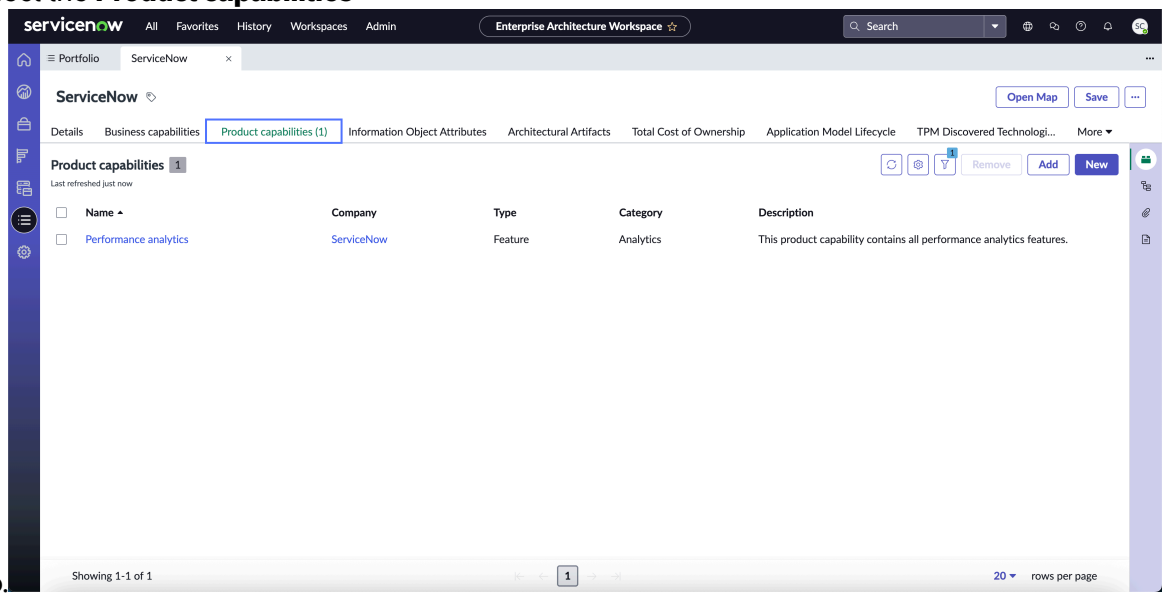
When the **Model ID** field for a business application is initially empty and later populated, product capabilities are automatically linked. All product capabilities associated with that model ID appear in the **Product capabilities** related list.

Role required: sn_apm.apm_user

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Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Portfolio List view by selecting the Portfolio icon ( ).
3. Select the expand row icon ( ) next to **Application Portfolio**.
4. Select **Business Applications**.
5. Select the business application that you want to view the product capabilities for.
6. Select the **Product capabilities** tab.



Result

A list of product capabilities associated with the business application is displayed.

Related topics

- Exploring product capabilities
- Associate a product capability with a business application
- Add an existing product capability to a business application

Associate a product capability with a business application

You can create product capabilities and associate them with business applications in the Enterprise Architecture Workspace.

Before you begin

Role required: sn_apm.apm_user

Procedure

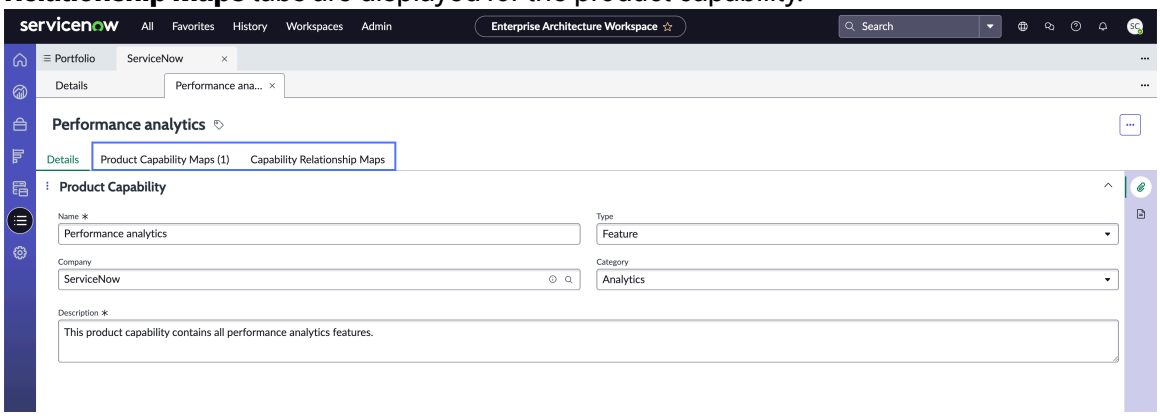
1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Portfolio List view by selecting the Portfolio icon ( ).
3. Select the expand row icon ( ) next to **Application Portfolio**.
4. Select **Business Applications**.
5. Select the business application that you want to create and associate new product capabilities to.

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6. Select **Product capabilities**.
7. To create a product capability and associate with the business application, select **New**.
8. In the **Create New Product Capability** page, fill in the form fields.
   For field information, see Create product capability form.
9. Select **Save**.

Result

The product capability is added to the business application.
Also, the associated **Product Capability Maps** and **Capability Relationship Maps** tabs are displayed for the product capability.



Related topics

- Exploring product capabilities
- View product capabilities for a business application
- Add an existing product capability to a business application
- Remove product capabilities from a business app

Add an existing product capability to a business application

You can add existing product capabilities to business applications in the Enterprise Architecture Workspace.

Before you begin

Role required: sn_apm.apm_user

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Portfolio List view by selecting the Portfolio icon ( ).
3. Select the expand row icon ( ) next to **Application Portfolio**.
4. Select **Business Applications**.
5. Select the business application that you want to add existing product capabilities to.
6. Select **Product capabilities**.
7. Select **Add**.
8. In the **Add product capability** pop-up window, select the existing product capability.
9. Select **OK**.

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Result
The existing product capability is added to the business application.

Related topics
- Exploring product capabilities
- View product capabilities for a business application
- Associate a product capability with a business application
- Remove product capabilities from a business app

Remove product capabilities from a business app

You can remove the product capabilities associated with business applications in the Enterprise Architecture Workspace, confirming only the relevant and current product capabilities are associated with the business application.

Before you begin
Role required: sn_apm.apm_user

Procedure
1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Portfolio List view by selecting the Portfolio icon ().
3. Select the expand row icon ( ) next to **Application Portfolio**.
4. Select **Business Applications**.
5. Select the business application that you want to remove the product capabilities for.
6. Select **Product capabilities**.
7. Select the check box next to the product capability that you want to remove and select **Remove**.
   A confirmation message appears.
8. Select **Remove**.

Result
The product capability is removed from the business application.

Related topics
- Exploring product capabilities
- View product capabilities for a business application
- Associate a product capability with a business application
- Add an existing product capability to a business application

Manage information objects in EA Workspace

Relate a business application to an information object using the CI relationship [cmdb_rel_ci] table of type Uses::Used by. Use this suggested relationship to get the logical data of the information object, which can be used to leverage the business application.

Before you begin
Role required: sn_apm.apm_user

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Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Portfolio List view by selecting the Portfolio icon ().
3. Select the expand row icon ( ) next to **Application Portfolio**.
4. Select **Business Applications**.
5. Select the name of a business application to view the associated artifacts.
6. Select the **Information Objects** tab.
   A list of information objects associated with the business application is displayed.
7. To relate an existing information object to the business application, select **Add**.
8. On the form, fill in the fields.
   For field information, see Add relationship form.
9. Select **Save**.
10. To delete a relationship between a business application and an information object, select an information object then select **Delete Relationship**.

    The relationship between the business application and the information object, and the attributes of the relationship gets deleted.
11. To edit an existing relationship details, select an information object then select **Edit**.
    Edit the details in the **Manage Relationship** form and select **Update**.

> **Note:** You can zoom on this page or any of the child pages to 200% or 400% through your browser settings without the loss of content or functionality. Page layouts are transformed into a vertical, stacked view automatically.

View architectural artifacts for a business application

You can view the list of architectural artifacts associated with business applications, in the Enterprise Architecture Workspace.

Before you begin

Architectural artifacts are created to describe a system, solution, or state of an enterprise. For more information on architectural artifacts, see Exploring architectural artifacts.

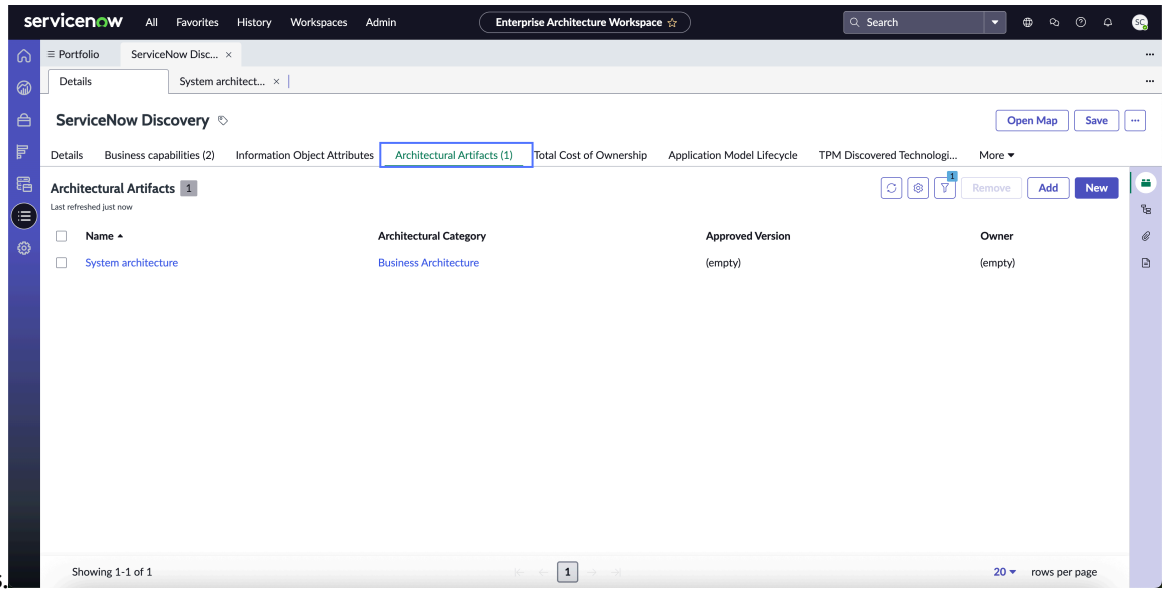
Role required: sn_apm.apm_read

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Portfolio List view by selecting the Portfolio icon ().
3. Select the expand row icon ( ) next to **Application Portfolio**.
4. Select **Business Applications**.
5. Select the business application that you want to view the architectural artifacts for.

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6. Select **Architectural Artifacts**.



If the **Architectural Artifacts** tab isn't visible in the related list, select **More** and then select **Architectural Artifacts**.

A list of artifacts associated with the business application is displayed.

Related topics

- Associate an architectural artifact with a business app
- Add an architectural artifact to a business application
- Exploring architectural artifacts
- Exploring architectural decision records (ADR)
- View all architectural artifact categories
- View all architectural artifacts
- Create or edit an architectural artifact from Portfolio page
- Add a related entity to an architectural artifact
- Share an architectural artifact with users or groups
- Manage access to architectural artifacts
- Request approval for an architectural artifact
- Download an architectural artifact version
- Delete an architectural artifact version

Associate an architectural artifact with a business app

You can create a new architectural artifact from the business application related list, in the EA Workspace.

Before you begin

Role required: sn_apm.apm_user

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Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Portfolio List view by selecting the Portfolio icon ().
3. Select the expand row icon ( ) next to **Application Portfolio**.
4. Select **Business Applications**.
5. Select the business application that you want to add a new architectural artifact to.
6. Select the **Architectural Artifacts** tab.
   A list of artifacts associated with the business application is displayed.
7. To create a new architectural artifact and associate it with the business application, select **New**.
8. In the **New architectural artifact** pop-up window, fill in the form fields.
   For field information, see Architectural artifact form.
9. Select **Create**.
   The architectural artifact is created and added to the business application.
   - For file type **Architectural decision record**, you will be redirected to the newly created architectural decision record page.
   - For file type **URL** or **Attachment**, you will be redirected to the architectural version record of the newly created architectural artifact.

Result

The newly created architectural artifact is added to the business application.

Related topics

Remove architectural artifacts from a business application

Add an architectural artifact to a business application

View all architectural artifact categories

View all architectural artifacts

Create or edit an architectural artifact from Portfolio page

Add a related entity to an architectural artifact

Share an architectural artifact with users or groups

Manage access to architectural artifacts

Request approval for an architectural artifact

Download an architectural artifact version

Delete an architectural artifact version

Add an architectural artifact to a business application

You can add existing architectural artifacts to business applications in the EA Workspace.

Before you begin

Role required: sn_apm.apm_user

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Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Portfolio List view by selecting the Portfolio icon ().
3. Select the expand row icon ( ) next to **Application Portfolio**.
4. Select **Business Applications**.
5. Select the business application that you want to add an existing architectural artifact to.
6. Select **Architectural Artifacts**.
   A list of artifacts associated with the business application is displayed.
7. Select **Add** to link an existing artifact to the business application.
8. In the **Add architectural artifact** pop-up window, select the existing artifact that you want to link to the business application and select **Ok**.
   The architectural artifact is added to the business application.

Related topics

Create or edit an architectural artifact from Portfolio page

Associate an architectural artifact with a business app

Remove architectural artifacts from a business application

View architectural artifacts for a business application

View all architectural artifact categories

View all architectural artifacts

Add a related entity to an architectural artifact

Share an architectural artifact with users or groups

Manage access to architectural artifacts

Request approval for an architectural artifact

Download an architectural artifact version

Delete an architectural artifact version

Remove architectural artifacts from a business application

You can remove the architectural artifacts associated with business applications in the EA Workspace, ensuring that only relevant and current architectural artifacts are associated with the business applications.

Before you begin

Role required: sn_apm.apm_user

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Portfolio List view by selecting the Portfolio icon ().
3. Select the expand row icon ( ) next to **Application Portfolio**.
4. Select **Business Applications**.
5. Select the business application that you want to remove the architectural artifact for.

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6. Select **Architectural Artifacts**.
   A list of artifacts associated with the business application is displayed.
7. Select the check box next to the architectural artifact that you want to remove and select **Remove**.
   A confirmation message appears.
8. Select **Remove**.
   The architectural artifact is removed from the business application.

Related topics

Add an architectural artifact to a business application

Associate an architectural artifact with a business app

View architectural artifacts for a business application

View all architectural artifact categories

View all architectural artifacts

Create or edit an architectural artifact from Portfolio page

Add a related entity to an architectural artifact

Share an architectural artifact with users or groups

Manage access to architectural artifacts

Request approval for an architectural artifact

Download an architectural artifact version

Delete an architectural artifact version

View Technology Reference Model products associated with business applications

You can view the list of Technology Reference Model (TRM) products associated with business applications, in the Enterprise Architecture Workspace (EA Workspace).

Before you begin

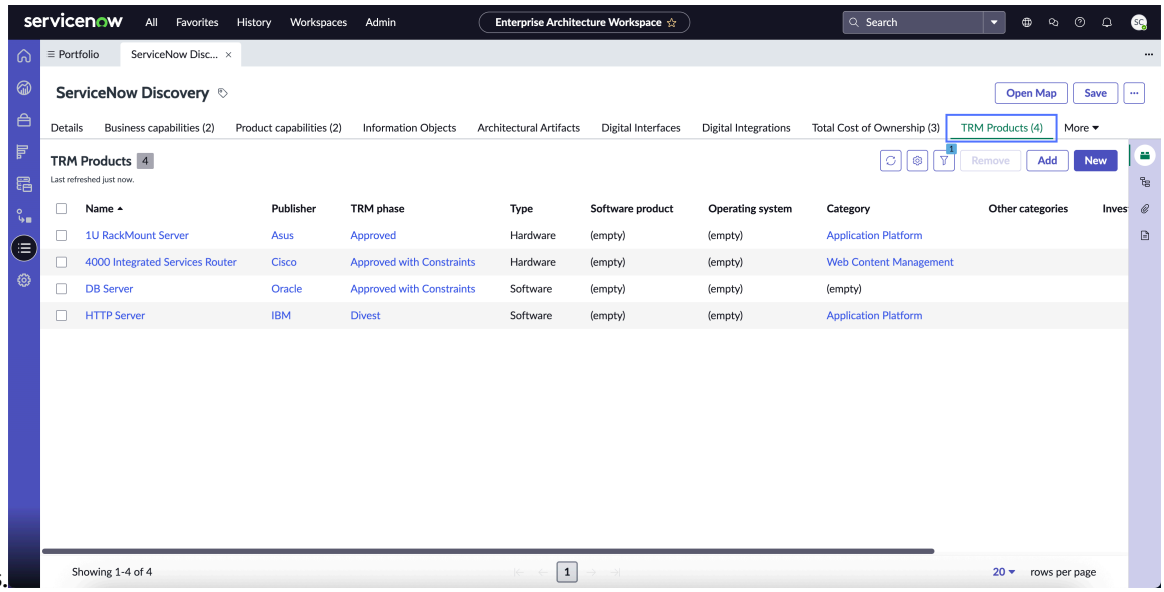
Role required: sn_apm.apm_user

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Portfolio List view by selecting the Portfolio icon ( ).
3. Select the expand row icon ( ) next to **Application Portfolio**.
4. Select **Business Applications**.

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5. Select the business application that you want to view the TRM products for.
6. Select **TRM Products**.



Result

A list of TRM products associated with the business application is displayed.

Related topics

- Exploring the application portfolio
- Technology Reference Model in Enterprise Architecture Workspace
- Working with Technology Reference Model (TRM) in EA Workspace

Create and associate TRM products with business applications

You can create a Technology Reference Model (TRM) products and associate it with business applications in the Enterprise Architecture Workspace.

Before you begin

Role required: sn_apm.apm_analyst

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Portfolio List view by selecting the Portfolio icon ( ).
3. Select the expand row icon ( ) next to **Application Portfolio**.
4. Select **Business Applications**.
5. Select the business application that you want to create and associate the new TRM product to.
6. Select **TRM Products**.
7. To create a TRM product and associate with the business application, select **New**.
8. On the Create New TRM Product page, fill in the form fields.

   For field information, see Create TRM product form.
9. Select **Save**.

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Result
The TRM product is added to the business application.

Related topics
- Exploring the application portfolio
- Technology Reference Model in Enterprise Architecture Workspace
- Working with Technology Reference Model (TRM) in EA Workspace

Add TRM products to business applications

You can add existing Technology Reference Model (TRM) product to business applications in the Enterprise Architecture Workspace.

Before you begin
Role required: sn_apm.apm_analyst

Procedure
1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Portfolio List view by selecting the Portfolio icon ().
3. Select the expand row icon ( ) next to **Application Portfolio**.
4. Select **Business Applications**.
5. Select the business application that you want to add the existing TRM product to.
6. Select **TRM Products**.
7. Select **Add**.
8. In the **Add TRM Product** pop-up window, select the existing TRM product.
9. Select **OK**.

Result
The existing TRM product is added to the business application.

Related topics
- Technology Reference Model in Enterprise Architecture Workspace
- Exploring business applications
- Working with Technology Reference Model (TRM) in EA Workspace
- Working with an application portfolio

Remove TRM products from a business application

You can remove the Technology Reference Model (TRM) products associated with business applications in the Enterprise Architecture Workspace, confirming only the relevant and current TRM products are associated with the business application.

Before you begin
Role required: sn_apm.apm_analyst

Procedure
1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Portfolio List view by selecting the Portfolio icon ().

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3. Select the expand row icon ( ) next to **Application Portfolio**.
4. Select **Business Applications**.
5. Select the business application that you want to remove the TRM products for.
6. Select **TRM Products**.
7. Select the check box next to the TRM product that you want to remove and select **Remove**.
   A confirmation message appears.
8. Select **Remove**.

Result
The TRM product is removed from the business application.

Related topics
- Technology Reference Model in Enterprise Architecture Workspace
- Exploring business applications
- Working with Technology Reference Model (TRM) in EA Workspace
- Working with an application portfolio

Working with product capabilities
Add or edit product capabilities in the Enterprise Architecture Workspace.

Related topics
- Exploring the application portfolio
- Exploring product capabilities

View all product capabilities
You can view the list of product capabilities for your application portfolio, in the Enterprise Architecture Workspace.

Before you begin
Role required: sn_apm.apm_user

Procedure
1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Portfolio List view by selecting the Portfolio icon ( ).
3. Select the expand row icon ( ) next to **Application Portfolio**.
4. Select **Product Capabilities**.

Related topics
- Exploring product capabilities

Add or edit a product capability
Create or edit product capabilities in the Enterprise Architecture Workspace.

Before you begin
Role required: sn_apm.apm_user

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Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Portfolio List view by selecting the Portfolio icon ().
3. Select the expand row icon ( ) next to **Application Portfolio**.
4. Select **Product Capabilities**.
5. Add or edit a product capability.
   - To create a new product capability, select **New**.
   - To update details of an existing product capability, select the product capability.
6. On the form, fill in the form fields.
   For field information, see Create product capability form.
7. Select **Save**.

Related topics

Exploring product capabilities

View product capabilities for a business application

Associate a product capability with a business application

Add an existing product capability to a business application

View all application services

View the list of all application services in the Enterprise Architecture Workspace.

Before you begin
Role required: admin

Procedure

1. Navigate to **Workspaces** > *Enterprise Architecture Workspace*.
2. Open the Portfolio List view by clicking the Portfolio icon ().
3. Select the expand row icon ( ) next to **Application Portfolio**.
4. Select **Application Services**.

Related topics

Add or edit an application service in the Enterprise Architecture Workspace

Add or edit an application service in the Enterprise Architecture Workspace

Add or edit an application service of your organization in the Enterprise Architecture Workspace.

Before you begin
Role required: sn_apm.apm_analyst

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Portfolio List view by clicking the Portfolio icon ().
3. Select the expand row icon ( ) next to **Application Portfolio**.

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4. Select **Application Services**.
5. Add or edit an application service.
   - To add an application service, select **Add**.
   - To update details of an existing application service, select the record then select **Edit**.
6. On the form, fill in the fields.

   For field information, see Application service form.
7. Select **Save** or **Update**.

Related topics

View all application services

Generate an application model for business applications

Execute a script to generate the application model for existing business applications. An application model is a structured representation of a business application's components and their relationships and interactions within your application landscape.

Before you begin
Role required: admin

About this task
In Enterprise Architecture Workspace, the application model is denoted by **Model ID** field for a business application. This model is important for creating the application model life cycle for a business application. For existing business applications, you can run the *`CSDM Product Model Assignment`* script to generate the Model ID.

Procedure
1. Navigate to **All** > **#System Definition** > **#Scheduled Jobs**.
2. Find and open the# scheduled job*`CSDM Product Model Assignment`*.
3. Select#**#Execute Now**.

Result
After executing the script, the system automatically creates models IDs for the existing business applications for which the **Model ID** field is empty.

Working with information portfolio

Information portfolio helps to capture information from the assets of your organization as information objects. You can categorize the information assets and determine its business application use.

Manage data domains

A data domain is a logical grouping that categorizes information objects (like tables, fields, or records) based on shared characteristics, business functions, or governance needs.

View all data domains

You can view the list of all data domains in the Enterprise Architecture Workspace.

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Before you begin

- The Enterprise Architecture analyst and Enterprise Architecture administrator with sn_apm.apm_admin role have create, write, and delete privileges.
- The Enterprise Architecture user with the sn_apm.apm_user role has read access only.

Role required: sn_apm.apm_user

Procedure

1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Portfolio List view by selecting the Portfolio icon  .
3. Select the expand row icon ( ) next to **Information Portfolio**.
4. Select **Data Domains**.

Related topics

Add or edit a data domain from the Portfolio page

Add or edit a data domain from the Portfolio page

Create or edit a data domain to relate an information object to the database catalog of a database instance to collect the physical data.

Before you begin

Although an Enterprise Architecture user (sn_apm.apm_user) can view a data domain, the access control on the Data Domain [sn_apm_data_domain] table is limited to its different users.

- The Enterprise Architecture analyst and Enterprise Architecture administrator with sn_apm.apm_admin role have create, write, and delete privileges.
- The Enterprise Architecture user with the sn_apm.apm_user role has read access only.

Role required: sn_apm.apm_admin

Procedure

1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Portfolio List view by selecting the Portfolio icon  .
3. Select the expand row icon ( ) next to **Information Portfolio**.
4. Select **Data Domains**.
5. Add or edit a data domain.
   - To add a data domain, select **New**.
   - To update details of an existing data domain, select the data domain.
6. On the form, fill in the fields.
   For field information, see Data Domain form.
7. Select **Save**.
   You can also create data domains from the Setup page of Enterprise Architecture Workspace. For information, see Add or edit an information data domain.

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Related topics

View all data domains

Manage information objects

An information object captures the logical data for a business application. It also describes the type of data that is interchanged between the application and the database.

View all information objects

You can view the list of all information objects in the Enterprise Architecture Workspace.

Before you begin

Role required: sn_apm.apm_user

Procedure

1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Portfolio List view by selecting the Portfolio icon  .
3. Select the expand row icon ( ) next to **Information Portfolio**.
4. Select **Information Objects**.

Related topics

Add or edit an information object

Manage information objects in EA Workspace

Associate an information object to a digital integration

Relate an information object to a digital interface

Add or edit an information object

Create an information object to capture the logical data for a business application.

Before you begin

Role required: sn_apm.apm_user

Procedure

1. Navigate to **Workspace** > **Enterprise Architecture Workspace**.
2. Open the Portfolio List view by selecting the Portfolio icon  .
3. Select the expand row icon next to **Information Portfolio**.
4. Add or edit an information object.
   - To add an information object, select **New**.
   - To update details of an existing information object, select the information object.
5. Fill in the form fields.
   For field information, see Create information object form.
6. Select **Save**.

Related topics

View all information objects

Manage information objects in EA Workspace

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Associate an information object to a digital integration

Relate an information object to a digital interface

Manage architectural artifacts

Architectural artifacts are created to describe a system, solution, or state of an enterprise. The goal of architectural artifacts in Enterprise Architecture is to enable enterprise architects to create and manage artifacts in their organization.

View all architectural artifact categories

View the list of all architectural artifact categories in the Enterprise Architecture Workspace.

Before you begin

Role required: admin

Procedure

1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Setup page by selecting the Setup icon ( ).
3. Select the expand row icon ( ) next to **Architectural Artifact Categories**.
4. Select **All**.

Related topics

Manage architectural artifact categories

Configure architectural artifact categories

Add or edit an architectural artifact category

View all architectural artifacts

Create or edit an architectural artifact from Portfolio page

Add a related entity to an architectural artifact

Share an architectural artifact with users or groups

Manage access to architectural artifacts

Request approval for an architectural artifact

Download an architectural artifact version

Delete an architectural artifact version

View all architectural artifacts

You can view the list of all architectural artifacts in the Enterprise Architecture Workspace.

Before you begin

The permission set at the artifact level also determines if you can view the artifact.

Role required: sn_apm.apm_user or sn_apm.apm_admin

Procedure

1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Portfolio List view by selecting the Portfolio icon .

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3. Select the expand row icon ( ) next to **Information Portfolio**.
4. Select **Architectural Artifacts**.

Related topics

- Download an architectural artifact version
- Manage access to architectural artifacts
- Create or edit an architectural artifact from Portfolio page
- Delete an architectural artifact version
- Add a related entity to an architectural artifact
- Request approval for an architectural artifact
- Share an architectural artifact with users or groups
- View all architectural artifact categories

Create or edit an architectural artifact from Portfolio page

Create an architectural artifact to align it with your business requirements.

Before you begin

The permission set at the artifact level determines if you can edit the artifact.

Role required: sn_apm.apm_user to add an architectural artifact.

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Portfolio List view by selecting the Portfolio icon  .
3. Select the expand row icon ( ) next to **Information Portfolio**.
4. Select **Architectural Artifacts**.
   A list of architectural artifacts is displayed.
5. Add or edit an architectural artifact.
   - To create an architectural artifact, select **New**.
   - To update details of an existing architectural artifact, select the architectural artifact.
6. In the **New architectural** artifact pop-up window, fill in the form fields.
   For field information, see Architectural artifact form.
7. Select **Create**.
   The architectural artifact is created. You are redirected to the architectural version record of the newly created architectural artifact.

Related topics

- Download an architectural artifact version
- Manage access to architectural artifacts
- Delete an architectural artifact version
- Add a related entity to an architectural artifact
- Request approval for an architectural artifact

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Share an architectural artifact with users or groups

View all architectural artifact categories

View all architectural artifacts

Add a related entity to an architectural artifact

Associate an architectural artifact to existing entities such as business capabilities, business applications, digital integrations, and digital interfaces. The association creates a relationship between the artifact and related entities.

Before you begin

Role required: sn_apm.apm_user

Procedure

1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Portfolio List view by selecting the Portfolio icon  .
3. Select the expand row icon () next to **Information Portfolio**.
4. Select **Architectural Artifacts**.
5. Select the architectural artifact that you want to add a related entity to.
   A new page appears and the details of the architectural artifact are displayed.
6. Select the **Related Entities** tab.
7. Select **New**.
8. On the form, fill in the fields.
   For a description of the field values, see Create related entities form.
9. Select **Save**.

Related topics

Download an architectural artifact version

Manage access to architectural artifacts

Create or edit an architectural artifact from Portfolio page

Delete an architectural artifact version

Request approval for an architectural artifact

Share an architectural artifact with users or groups

View all architectural artifact categories

View all architectural artifacts

Share an architectural artifact with users or groups

You can share architectural artifacts with users or groups for enhanced and effective collaboration with all relevant stakeholders, in the Enterprise Architecture Workspace.

Before you begin

Role required: sn_apm.apm_user and you should have **Editor** permission assigned for that architectural artifact.

About this task

You can share the architectural artifacts with individual users or groups and provide them with editor, viewer, or owner access, according to your requirement.

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Based on your existing role, you can provide certain permissions.

- If you're the owner of the architectural artifact, you can provide Viewer, Editor, and Owner permission to other users or groups.
- If you're assigned the Editor role permission to an architectural artifact, you can provide Editor or Viewer permission to other users or groups.
- If you're assigned the Viewer role permission to an architectural artifact, you can't provide any permission to other users or groups.

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Portfolio List view by selecting the Portfolio icon  .
3. Select the expand row icon ( ) next to **Information Portfolio**.
4. Select **Architectural Artifacts**.
5. Select the architectural artifact that you want to share.
   The architectural artifacts details page appears.
6. Select **Share**.
7. In the **Share architectural artifact** pop-up window, fill in the form fields.

   For field information, see Share architectural artifacts form.
8. Select **Share**.
   The architectural artifact is shared with the users and groups and an email notification is sent to all the recipients.

Result

On sharing an architectural artifact, the recipients receive an email notification. The email notification contains:

- A link to the architectural artifact
- Comments mentioned by you while sharing the artifact

Related topics

Manage access to architectural artifacts

Download an architectural artifact version

Create or edit an architectural artifact from Portfolio page

Delete an architectural artifact version

Add a related entity to an architectural artifact

Request approval for an architectural artifact

View all architectural artifact categories

View all architectural artifacts

Manage access to architectural artifacts

You can manage the user or group access to specific architectural artifacts from the Enterprise Architecture Workspace.

Before you begin

Role required: All users with **Editor** permission assigned.

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About this task

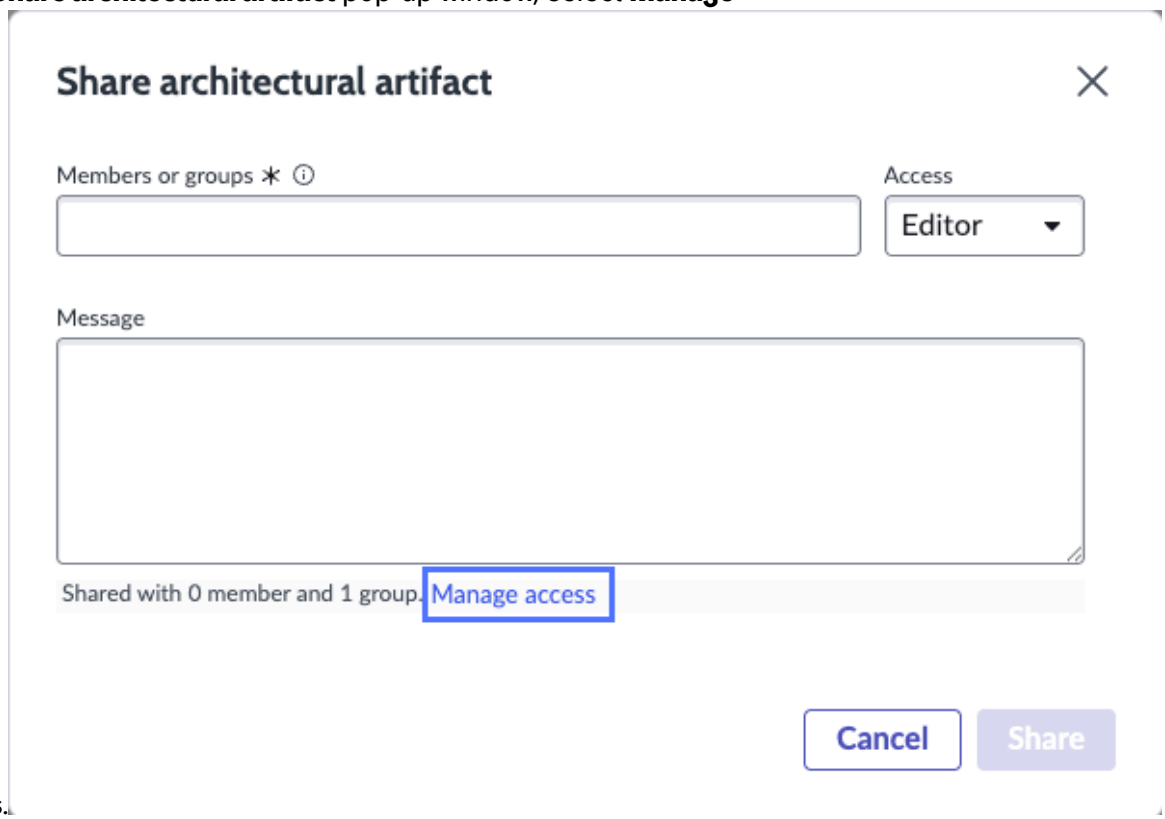
You can provide individual users or groups access to an architectural artifact according to your requirement.

Based on your existing role, you can provide certain permissions.

- If you're the owner of the architectural artifact, you can provide Viewer, Editor, and Owner permission to other users or groups.
- If you're assigned the Editor role permission to an architectural artifact, you can provide Editor or Viewer permission to other users or groups.
- If you're assigned the Viewer role permission to an architectural artifact, you can't provide any permission to other users or groups.

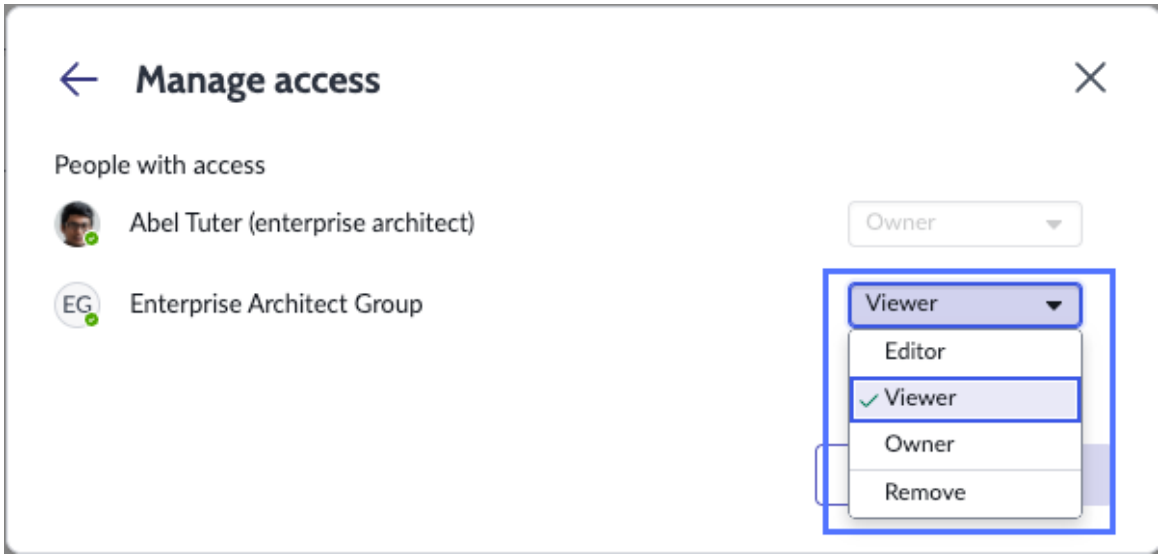
Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Portfolio List view by selecting the Portfolio icon .
3. Select the expand row icon ( ) next to **Information Portfolio**.
4. Select **Architectural Artifacts**.
5. Select the architectural artifact that you want to manage access for.
   The architectural artifacts details page appears.
6. Select **Share**.
7. In the **Share architectural artifact** pop-up window, select **Manage access**.



8. Next to the user or group for whom you want to change permission, select and update the permission from the **Access** drop-down list.

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9. Select **Save**.
   The architectural artifact access is updated.

Related topics

- Share an architectural artifact with users or groups
- Exploring architectural decision records (ADR)
- Download an architectural artifact version
- Create or edit an architectural artifact from Portfolio page
- Delete an architectural artifact version
- Add a related entity to an architectural artifact
- Request approval for an architectural artifact
- View all architectural artifact categories
- View all architectural artifacts

Request approval for an architectural artifact

You can request approval for architectural artifacts of the type **URL** or **Attachment** from users who are part of the Enterprise Architect user group. The user reviews and approves the request.

Before you begin

Role required: sn_apm.apm_user

Procedure

1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Portfolio List view by selecting the Portfolio icon .
3. Select the expand row icon ( ) next to **Information Portfolio**.
4. Select **Architectural Artifacts**.
5. Open the architectural artifact for which the artifact version requires approval.
6. Select the **Artifact versions** tab.
7. Select a version of the record that you want to send for approval.

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The architectural artifact details page appears displaying the version-specific contents.

8. Select **Request Approval**.

Result

The record version is submitted for the approval to an Enterprise Architect. An email notification is sent to the approver.

Related topics

- Download an architectural artifact version
- Manage access to architectural artifacts
- Create or edit an architectural artifact from Portfolio page
- Delete an architectural artifact version
- Add a related entity to an architectural artifact
- Share an architectural artifact with users or groups
- View all architectural artifact categories
- View all architectural artifacts
- Request approval for an ADR version

Download an architectural artifact version

Download a version of an architectural artifact that has the file type defined as **Attachment**.

Before you begin

Role required: sn_apm.apm_user

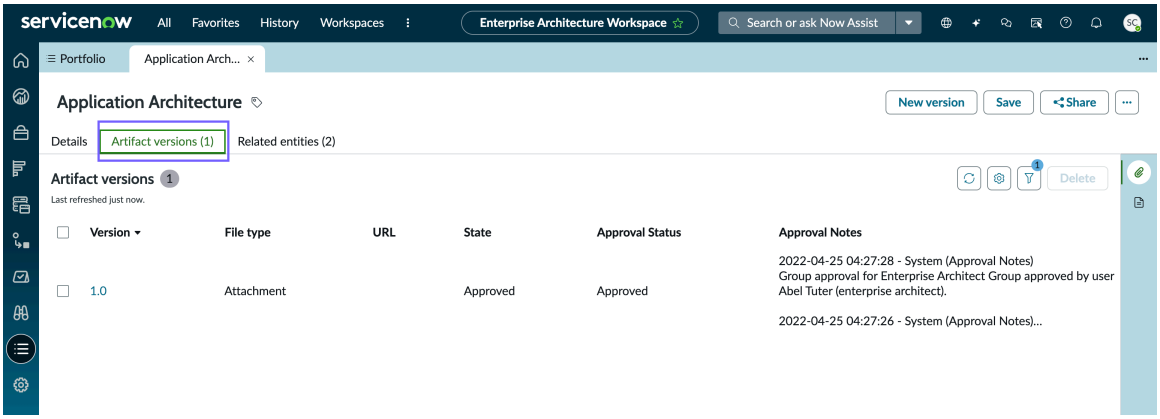
About this task

Downloading and storing different versions of architectural artifacts helps in maintaining comprehensive documentation for that architectural artifact.

Procedure

1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Portfolio List view by selecting the Portfolio icon  .
3. Select the expand row icon ( ) next to **Information Portfolio**.
4. Select **Architectural Artifacts**.
5. Select the architectural artifact that you want to download a version for.
6. Select **Artifact versions**.

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7. In the **Version** column, select the architectural artifact version that you want to download the data for.
8. Select **Download**.
   The architectural artifact is downloaded to your local drive.

Related topics

- Manage access to architectural artifacts
- Create or edit an architectural artifact from Portfolio page
- Delete an architectural artifact version
- Add a related entity to an architectural artifact
- Request approval for an architectural artifact
- Share an architectural artifact with users or groups
- View all architectural artifact categories
- View all architectural artifacts

Delete an architectural artifact version

Delete an architectural artifact version that is in **Draft** state from the Enterprise Architecture Workspace.

Before you begin

Role required: sn_apm.apm_user

Procedure

1. Navigate to **Workspace** > *`Enterprise Architecture Workspace`*.
2. Open the Portfolio List view by selecting the Portfolio icon .
3. Select the expand row icon ( ) next to **Information Portfolio**.
4. Select **Architectural Artifacts**.
5. Open the architectural artifact for which you want to delete an architectural artifact version.
6. Delete the architectural artifact version.
   - For architectural artifacts of type **URL** and **Attachment**:
     a. Select **Artifact versions**.
     b. Select the check box next to the architectural artifact version that you want to delete. You can only delete versions that are in **Draft** state.

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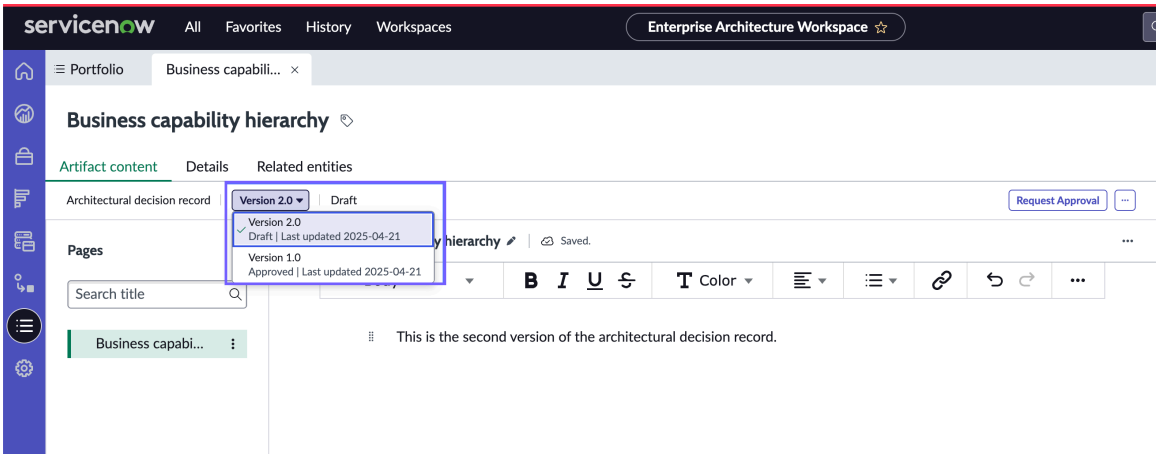
c. Select **Delete**.

A confirmation pop-up appears.

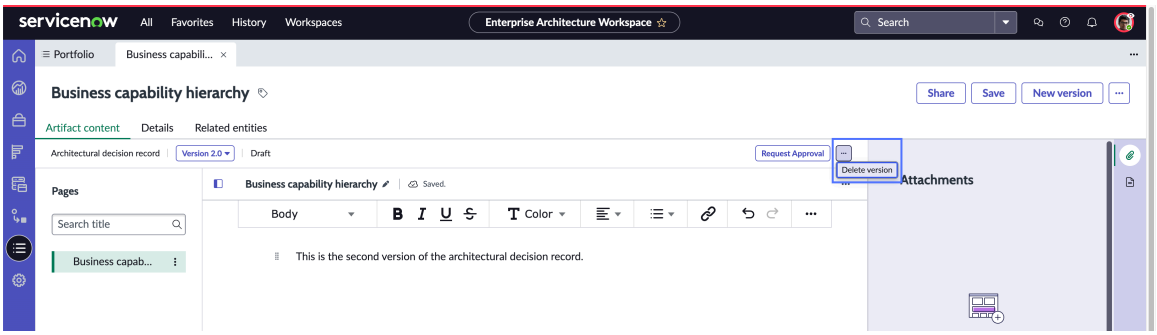
d. Select **Delete**.

- For architectural artifacts of type **Architectural Decision Record**:

a. Select the version of ADR that you want to delete and that has status **Draft**.



b. Select the delete version icon (...) and then select **Delete version**.



A confirmation pop-up appears.

c. Select **Delete**.

Result

The record version is deleted. On deleting a particular version of an architectural artifact, the details of the previous version of the architectural artifact are displayed by default.

Related topics

- View all architectural artifact categories
- View all architectural artifacts
- Create or edit an architectural artifact from Portfolio page
- Add a related entity to an architectural artifact
- Share an architectural artifact with users or groups
- Manage access to architectural artifacts

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Request approval for an architectural artifact

Download an architectural artifact version

Manage architectural decision records (ADR)

The Architectural Decision Records (ADR) help you to explain your infrastructure. ADR is a type of artifact that helps in understanding the background of a specific architectural decision.

Add or edit an architectural decision record (ADR)

Create or update an artifact of the type architectural decision record (ADR) to align it with your business requirements.

Before you begin

The ADR feature in Enterprise Architecture Workspace uses the ServiceNow Docs component (sn_docs) to create pages in the Artifacts section. Docs component v6.0.0 is automatically installed with Enterprise Architecture Workspace v3.4.0.

If you're using an older version of Enterprise Architecture Workspace with Docs component v6.0.0, upgrade the workspace to v3.4.0 to fully use the ADR functionality. For more information, see KB2017926.

The permission set at the artifact level determines if you can edit the artifact.

Role required: sn_apm.apm_user to add an architectural decision record (ADR).

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Portfolio List view by selecting the Portfolio icon.
3. Select the expand row icon ( ) next to **Information Portfolio**.
4. Select **Architectural Decision Records (ADR)**.
5. Add or edit an architectural decision record.
   - To add an architectural decision record, select **New**.
   - To update details of an existing architectural decision record, select the architectural decision record.
6. In the **New architectural artifact** pop-up window, fill in the form fields.
   For field information, see Architectural artifact form.
7. Select **Create**.

Result

The architectural decision record is created and added to the artifacts list. You're also redirected to the newly created architectural decision record page.

Related topics

Request approval for an architectural artifact

Add a related entity to an architectural artifact

Create and manage pages and subpages for ADRs

Tag users or records in Architectural Decision Records

Reference additional records in decision records

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Add an architectural decision record version

Request approval for an ADR version

Generate a summary for Architectural Decision Records (ADRs)

Quickly learn the details of the Architectural Decision Records (ADR) from the summary that is generated by ServiceNow Otto® in the Enterprise Architecture Workspace. Use ServiceNow Otto® to generate summaries of large ADR artifacts and understand architectural decisions faster.

Before you begin

- **Note:** Depending on your license, you will have access to certain application features, generative AI skills, agentic workflows, and AI agents. For more information, see ServiceNow product tiers.

- **Important:** This generative AI skill is turned on by default. The skill will be automatically available to appropriate role users for the application. For more information, see AI agents, skills, and agentic workflows on by default.

- **Note:** The ADR feature in Enterprise Architecture Workspace uses the ServiceNow Docs component (sn_docs) to create pages in the Artifacts section. Docs component v6.0.0 is automatically installed with Enterprise Architecture Workspace v3.4.0.

  If you're using an older version of Enterprise Architecture Workspace with Docs component v6.0.0, upgrade the workspace to v3.4.0 to fully use the ADR functionality. For more information, see KB2017926.

The default AI model provider for this skill is Azure OpenAI.

Note: Starting with the September 2026 release, Gemma 4 joins our growing portfolio of open-weight models available through Now LLM Service. The latest industry advancements are available alongside sovereignty-focused options. All models are hosted and governed by ServiceNow with the same infrastructure and data protections. Older models will remain available for existing published AI skills, agents, and agentic workflows, but will no longer be available for new development or configuration. For details, see the KB3066214: ServiceNow Otto Model Upgrades article in the Now Support Knowledge Base.

Role required: sn_apm.apm_user

About this task

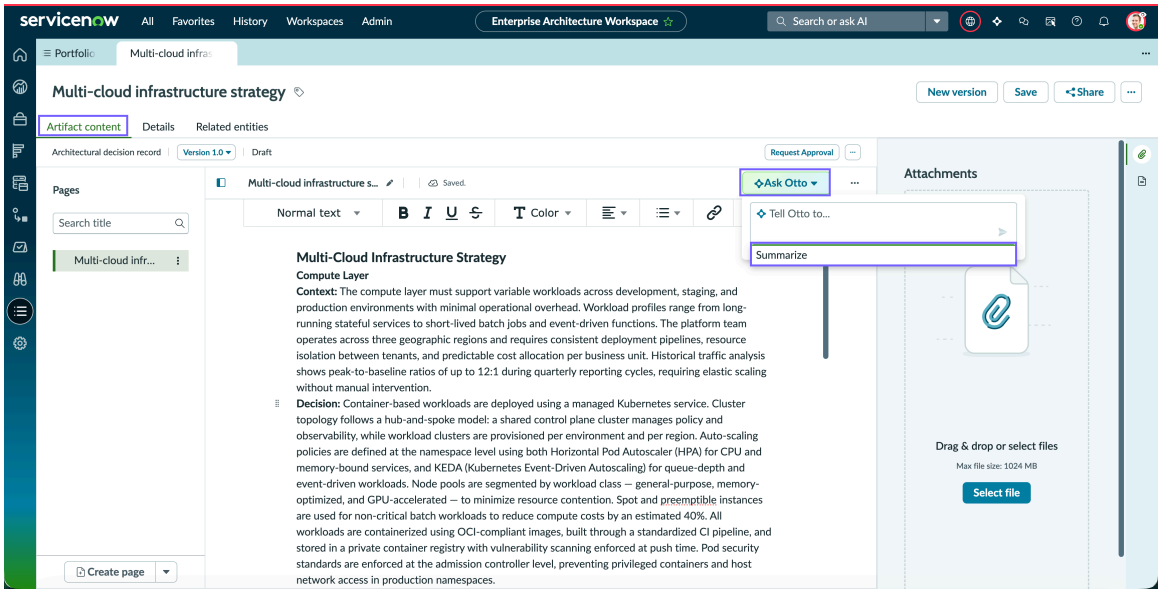
When an Enterprise Architect receives an approval request for the ADR type of artifact, the **Summarize** button quickly generates a summary of the ADR document content. This saves time when reviewing large documents.

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Portfolio List view by selecting the Portfolio icon  .
3. Select the expand row icon ( ) next to **Information Portfolio**.
4. Select **Architectural Decision Records**.

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5. Select the ADR that you want to summarize the content for.
6. In the **Artifact content** tab, select **Ask Otto** and then select **Summarize**.



7. In the Tell Otto to box press enter or select the send button.
8. Select **Done** to complete the summarization.
   You can also copy the summarized text.

Related topics

- Add or edit an architectural decision record (ADR)
- Exploring ServiceNow Otto for Enterprise Architecture (EA)
- Configure ServiceNow Otto for Enterprise Architecture (EA)
- ServiceNow Otto for Enterprise Architecture (EA) access roles

Elaborate or shorten content in ADRs

Elaborate or shorten the Architectural Decision Records (ADR) content using ServiceNow Otto® in the Enterprise Architecture Workspace.

Before you begin

Note: Depending on your license, you will have access to certain application features, generative AI skills, agentic workflows, and AI agents. For more information, see ServiceNow product tiers.

Important: This generative AI skill is turned on by default. The skill will be automatically available to appropriate role users for the application. For more information, see AI agents, skills, and agentic workflows on by default.

Note: The ADR feature in Enterprise Architecture Workspace uses the ServiceNow Docs component (sn_docs) to create pages in the Artifacts section. Docs component v6.0.0 is automatically installed with Enterprise Architecture Workspace v3.4.0.

If you're using an older version of Enterprise Architecture Workspace with Docs component v6.0.0, upgrade the workspace to v3.4.0 to fully use the ADR functionality. For more information, see KB2017926.

The default AI model provider for this skill is Azure OpenAI.

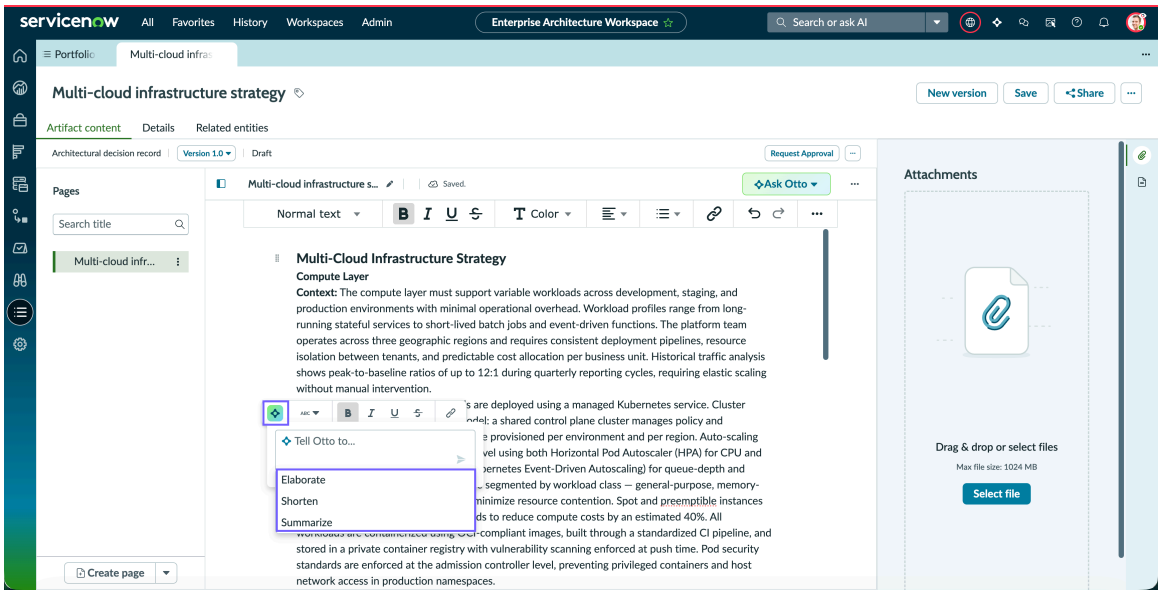
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Note: Starting with the September 2026 release, Gemma 4 joins our growing portfolio of open-weight models available through Now LLM Service. The latest industry advancements are available alongside sovereignty-focused options. All models are hosted and governed by ServiceNow with the same infrastructure and data protections. Older models will remain available for existing published AI skills, agents, and agentic workflows, but will no longer be available for new development or configuration. For details, see the KB3066214: ServiceNow Otto Model Upgrades article in the Now Support Knowledge Base.

Role required: sn_apm.apm_user

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Portfolio List view by selecting the Portfolio icon.
3. Select the expand row icon ( ) next to **Information Portfolio**.
4. Select **Architectural Decision Records**.
5. Select the ADR whose content you want to elaborate or shorten.
6. From the **Artifact content** tab, select the text.



7. Select the ServiceNow Otto® drop-down to perform any of the following tasks.
   - **Summarize**: Summarizes the selected text.
   - **Elaborate**: Elaborates the selected text.
   - **Shorten**: Shortens the selected text.
8. **Optional:** Select **Insert below** to insert the content in the ADR record.

Related topics

- Add or edit an architectural decision record (ADR)
- Exploring ServiceNow Otto for Enterprise Architecture (EA)
- Configure ServiceNow Otto for Enterprise Architecture (EA)
- ServiceNow Otto for Enterprise Architecture (EA) access roles

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Create and manage pages and subpages for ADRs

Flexibly organize information for your architectural decision records (ADR) by creating, duplicating, and deleting pages and subpages in the Enterprise Architecture Workspace.

Before you begin

An ADR can have multiple doc pages associated with it to help you organize key architectural artifact details. Predefined ServiceNow Docs component (sn_docs) templates are available. You can create ADR pages using one of these templates or start with a blank page.

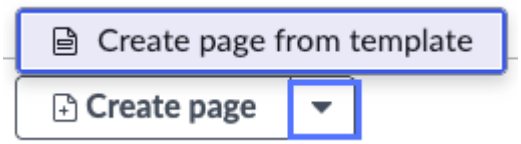
Note: The ADR feature in Enterprise Architecture Workspace uses the ServiceNow Docs component (sn_docs) to create pages in the Artifacts section. Docs component v6.0.0 is automatically installed with Enterprise Architecture Workspace v3.4.0.

If you're using an older version of Enterprise Architecture Workspace with Docs component v6.0.0, upgrade the workspace to v3.4.0 to fully use the ADR functionality. For more information, see KB2017926.

Role required: sn_apm.apm_user and you should have **Editor** access to the ADR.

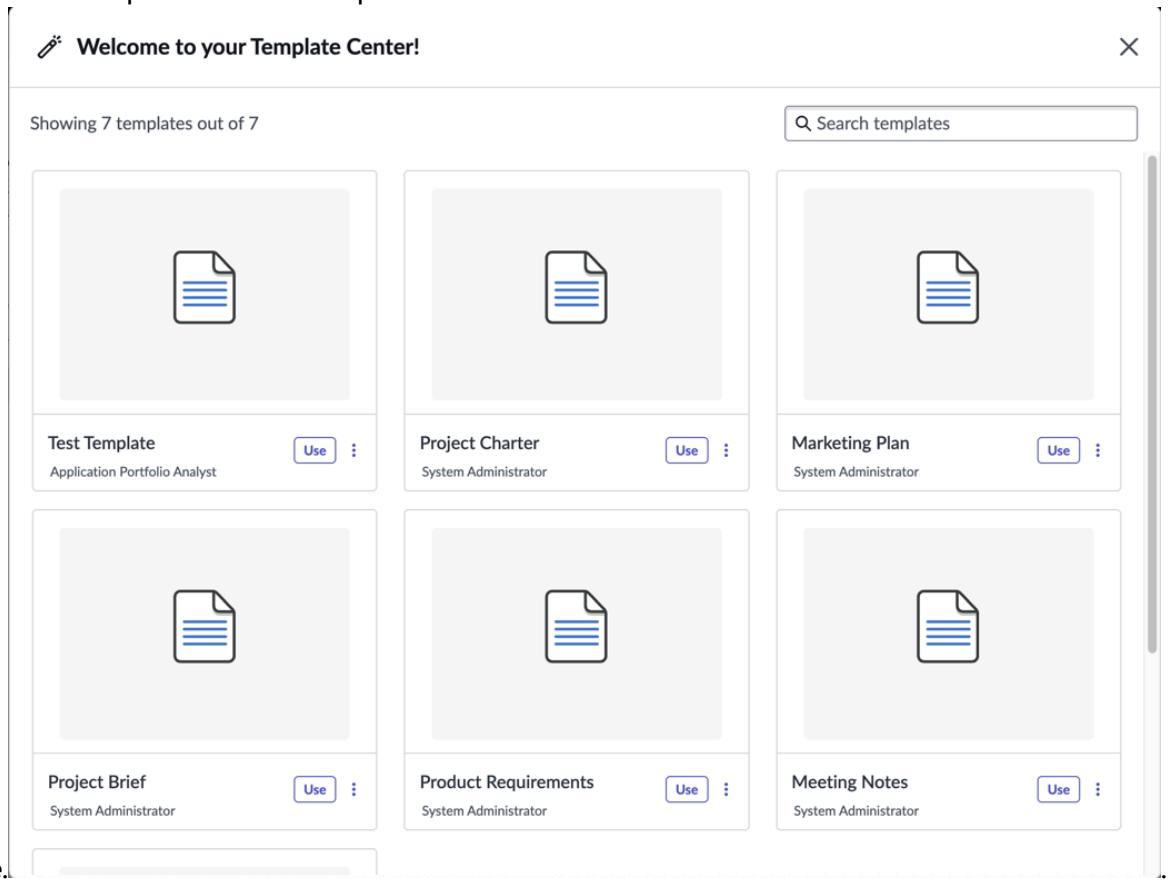
Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Portfolio List view by selecting the Portfolio icon.
3. Select the expand row icon ( ) next to **Information Portfolio**.
4. Select **Architectural Decision Records (ADR)**.
5. Select the ADR that you would like to create a doc page for.
6. To create a page, you can create an empty page or start with a predefined template.
   - For an empty page, select **Create page**.
   - To create from templates:
     a. Select **Create Page from template**.



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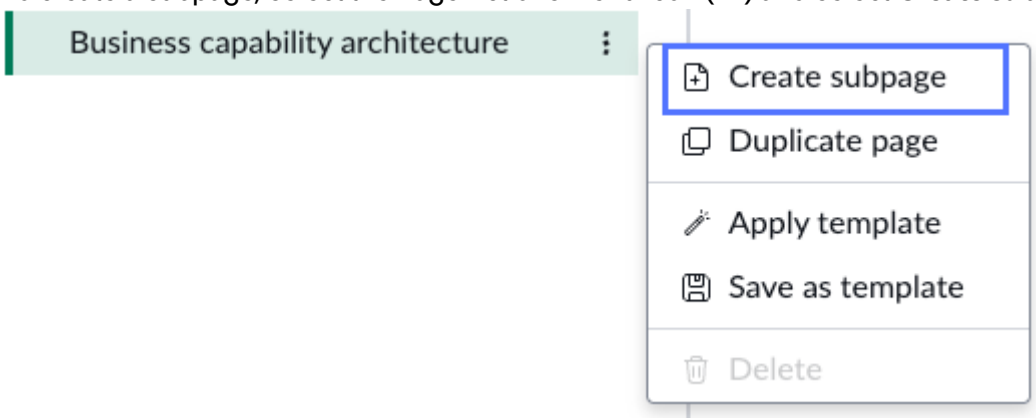
b. Choose a template from the Template Center and select



Use.

The new page is created and added to your ADR with the name of the selected template, which you can rename.

7. To create a subpage, select the Page Actions menu icon (⋮) and select **Create subpage**.



8. To delete a page or a subpage, select the Page Actions menu (⋮) and select **Delete**.

Related topics

- Tag users or records in Architectural Decision Records
- Generate a summary for Architectural Decision Records (ADRs)
- Elaborate or shorten content in ADRs
- Add or edit an architectural decision record (ADR)
- Request approval for an ADR version

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Add an architectural decision record version

Reference additional records in decision records

Tag users or records in Architectural Decision Records

You can tag users or records in architectural decision records (ADR) in the Enterprise Architecture Workspace.

Before you begin

Note: The ADR feature in Enterprise Architecture Workspace uses the ServiceNow Docs component (sn_docs) to create pages in the Artifacts section. Docs component v6.0.0 is automatically installed with Enterprise Architecture Workspace v3.4.0.

If you're using an older version of Enterprise Architecture Workspace with Docs component v6.0.0, upgrade the workspace to v3.4.0 to fully use the ADR functionality. For more information, see KB2017926.

Role required: sn_apm.apm_user and you should have **Editor** access to the ADR.

About this task

Tagging users in ADRs ensures that relevant stakeholders are aware of and can contribute to important architectural decisions. Tagging records helps you to organize relevant information systematically and locate records relevant to a particular ADR easily. The records you can tag are:

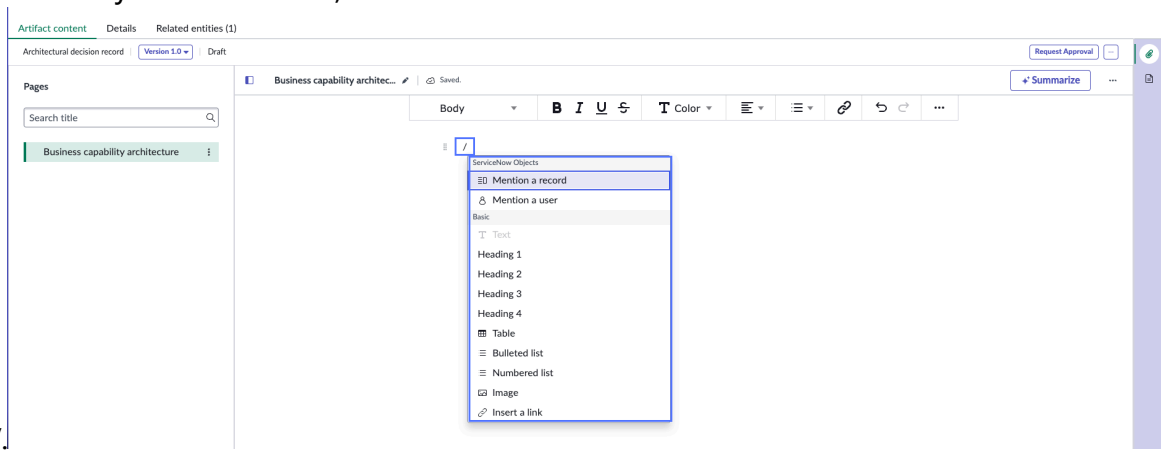
- Architectural artifacts or diagrams
- Business applications
- Business capabilities
- Business processes
- Digital integrations
- Digital interfaces
- Information objects
- TRM products
- Value stream details

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Portfolio List view by selecting the Portfolio icon  .
3. Select the expand row icon ( ) next to **Information Portfolio**.
4. Select **Architectural Decision Records (ADR)**.
5. Select the ADR where you want to tag users or records.

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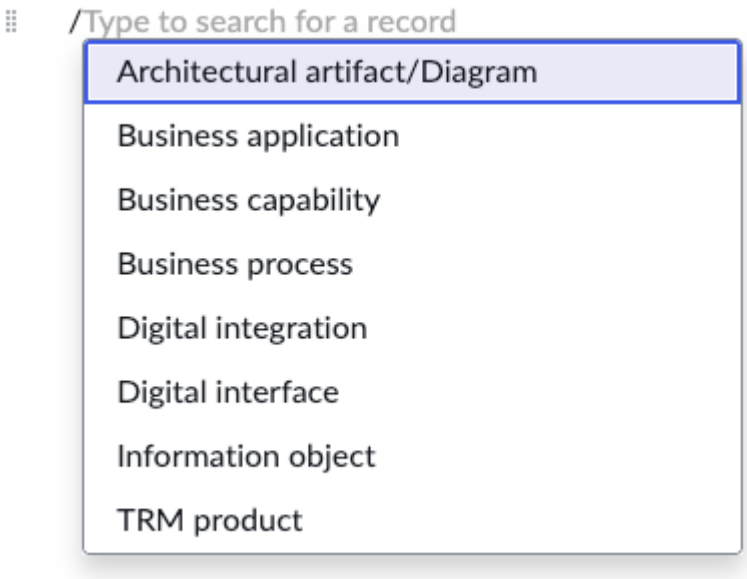
6. In the body of the ADR docs, enter /.



A context menu is displayed.

7. Tag a record or a user.
   - To tag a record:
     a. Select **Mention a record**.

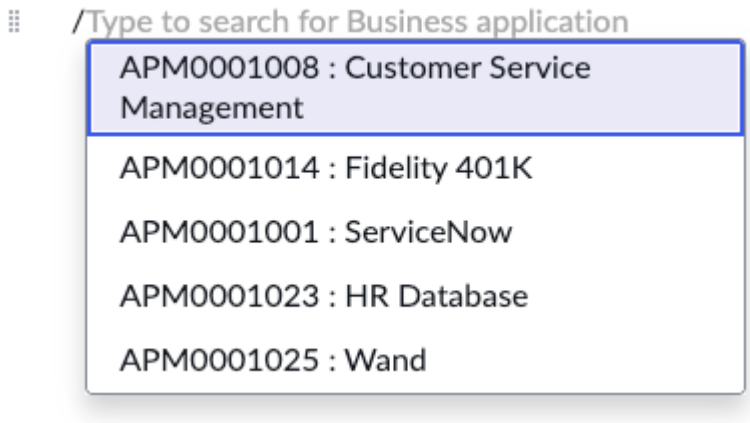
        A list of record types you can tag is displayed.



     b. Select a record type.

        A context menu is displayed listing the available records for that record type.

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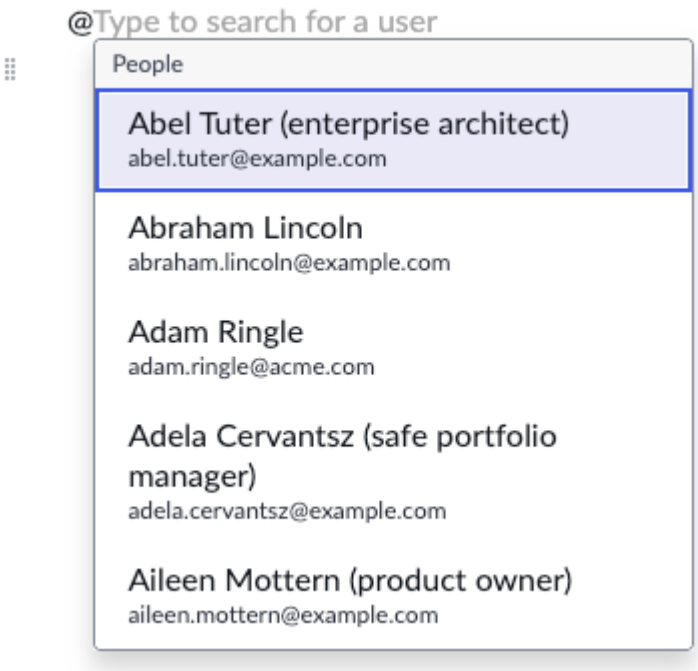
c. Select the relevant record.

The record is added to the ADR page.

- To tag a user:

a. Select **Mention a user**.

A list of users is displayed.



b. Select the relevant user. You can also enter the user's name to search for a specific user.

The user is added in the ADR page.

Related topics

- Generate a summary for Architectural Decision Records (ADRs)
- Elaborate or shorten content in ADRs
- Add or edit an architectural decision record (ADR)
- Request approval for an ADR version
- Create and manage pages and subpages for ADRs

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Add an architectural decision record version

Reference additional records in decision records

Reference additional records in decision records

You can customize the default values of the *sn_apm_ws.record_mention_config* system property, to enable the tagging of additional record tables in an architectural decision record (ADR).

Before you begin

Role required: sn_apm.apm_admin

Procedure

1. Navigate to *sys_properties.list*.
2. From the system properties list, locate and open the *sn_apm_ws.record_mention_config* system property.
3. In the **Value** field, add the details of the record table that you want to tag in the ADR docs component.
   For example, if you want to tag records from the Business application table (*cmdb_ci_business_app*) in the ADR docs component, add the table details to the array in the following format.

```
{
  "sourceTable": "cmdb_ci_business_app",
  "filterCondition": "",
  "label": "Business application",
  "fields": [
    "name"
  ]
}
```

   In the format, you must enter the relevant information in the following rows:

   - **sourceTable**: Enter the source table from where you want to tag data in the ADR docs component.
   - **label**: Enter the name of the source table that will be displayed in the **Mention a record** context menu when you enter **/** in the ADR docs component.
4. Select **Update**.
   You can start tagging records from the new table in the ADR docs component. For more information, see Tag users or records in Architectural Decision Records.

Related topics

Tag users or records in Architectural Decision Records

Add or edit an architectural decision record (ADR)

Request approval for an ADR version

Create and manage pages and subpages for ADRs

Add an architectural decision record version

Add an architectural decision record version

Create multiple versions of architectural decision records (ADR) in the Enterprise Architecture Workspace. Creating multiple ADR versions enable you to capture the evolution of architectural decisions over time or capture details of alternatives to existing architectural decisions.

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Before you begin

The ADR feature in Enterprise Architecture Workspace uses the ServiceNow Docs component (sn_docs) to create pages in the Artifacts section. Docs component v6.0.0 is automatically installed with Enterprise Architecture Workspace v3.4.0.

If you're using an older version of Enterprise Architecture Workspace with Docs component v6.0.0, upgrade the workspace to v3.4.0 to fully use the ADR functionality. For more information, see KB2017926.

Role required: Depends on the role permissions set for a particular ADR.

About this task

Procedure

1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Portfolio List view by selecting the Portfolio icon.
3. Select the expand row icon ( ) next to **Information Portfolio**.
4. Select **Architectural Decision Record**.
5. Select the ADR that you want to add a new version for.

   A page appears displaying the details of the ADR.
6. Select **New Version**.
7. On the **Create new version** pop-up window, select the **Copy the content from previous version** check box if you want to copy over the existing content from the current version of the ADR.

   You can skip this step if you don't want to copy over the existing ADR data.
8. Select **Create**.

Result

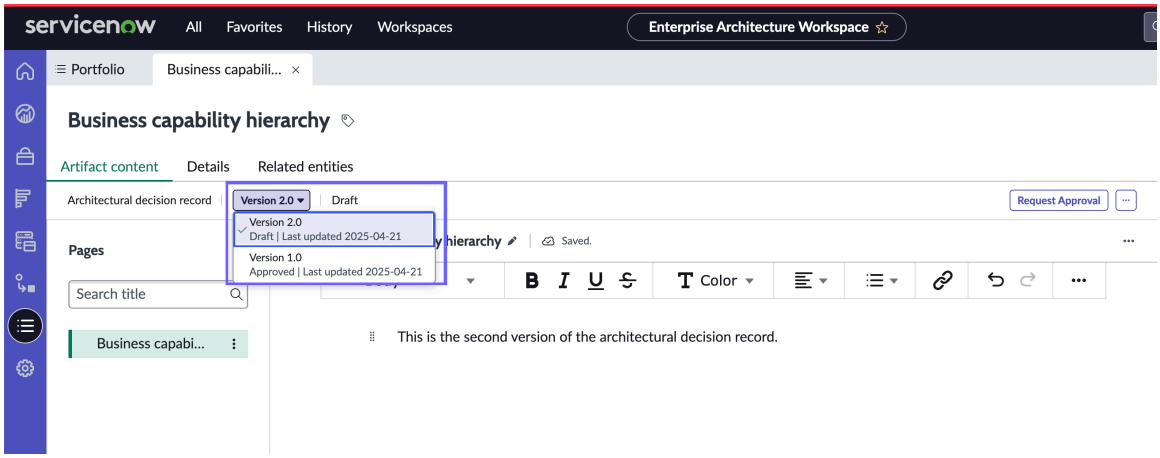
The new version of ADR is created. The new version number of the ADR is auto-selected in the version drop-down and the ADR doc is refreshed.

You can view version specific ADR content using the version drop-down. The versions drop-down displays the following information:

- Version number
- ADR status
- Date of last update

On selecting a particular version, you're directed to the ADR artifact content page for that version.

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Related topics

- Manage access to architectural artifacts
- Tag users or records in Architectural Decision Records
- Add or edit an architectural decision record (ADR)
- Request approval for an ADR version
- Create and manage pages and subpages for ADRs
- Reference additional records in decision records

Request approval for an ADR version

Send a version of architectural artifacts of the type Architectural Decision Record (ADR) for approval to an Enterprise Architect user. The user reviews and approves the request.

Before you begin

Role required: sn_apm.apm_user

Procedure

1. Navigate to **Workspace** > *`Enterprise Architecture Workspace`*.
2. Open the Portfolio List view by selecting the Portfolio icon .
3. Select the expand row icon ( ) next to **Information Portfolio**.
4. Select **Architectural Artifacts**.
5. Open the ADR for which the artifact version requires approval.
   The ADR architectural content page appears displaying the version-specific contents.
6. Select **Request Approval**.

Result

The record version is submitted for the approval to an Enterprise Architect. An email notification is sent to the approver.

Related topics

- Add or edit an architectural decision record (ADR)
- Create and manage pages and subpages for ADRs
- Tag users or records in Architectural Decision Records

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Reference additional records in decision records

Add an architectural decision record version

Manage architectural documents

Architectural documents are an artifact type used to store and govern documents generated from Enterprise Modeling and Visualization diagrams. They provide a centralized view of all diagram-generated documents.

View all architectural documents

View all architectural documents that are automatically generated from the diagrams page and the documents that are manually created.

Before you begin

Role required: sn_apm.apm_user

Procedure

1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Portfolio List view by selecting the Portfolio icon  .
3. Select the expand row icon ( ) next to **Information Portfolio**.
4. Select **Architectural Documents**.

Related topics

Create an architectural document

Generate a document from a diagram

Add a related entity to an architectural document

Manage artifact content

Delete an architectural document

Working with the document templates

Create an architectural document

Create an architectural document in the Enterprise Architecture Workspace. An Architectural document captures and governs architecture information generated from diagrams.

Before you begin

Role required: sn_apm.apm_user

Procedure

1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Portfolio List view by selecting the Portfolio icon  .
3. Select the expand row icon ( ) next to **Information Portfolio**.
4. Select **Architectural Documents**.
5. Select **New**.
6. Enter a name and select an architectural category.

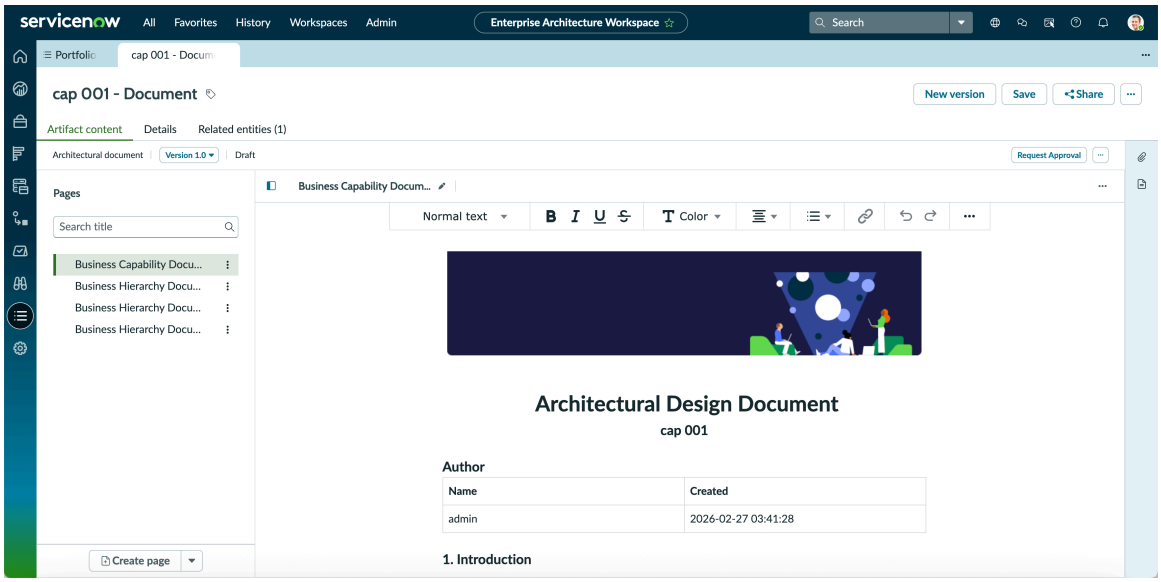
Note: By default, the format is set to **Document**.

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7. Select **Create**.
   An artifact gets created.

   You can see the following tabs:

   - Artifact content
   - Details
   - Related entities



Related topics

- View all architectural documents
- Edit artifact content of an architectural document
- Edit an architectural document details
- Add a related entity to an architectural document
- Manage artifact content
- Delete an architectural document
- Generate a document from a diagram
- View documents for a diagram
- Working with the document templates

Edit artifact content of an architectural document

Edit artifact content of an architectural document.

Before you begin

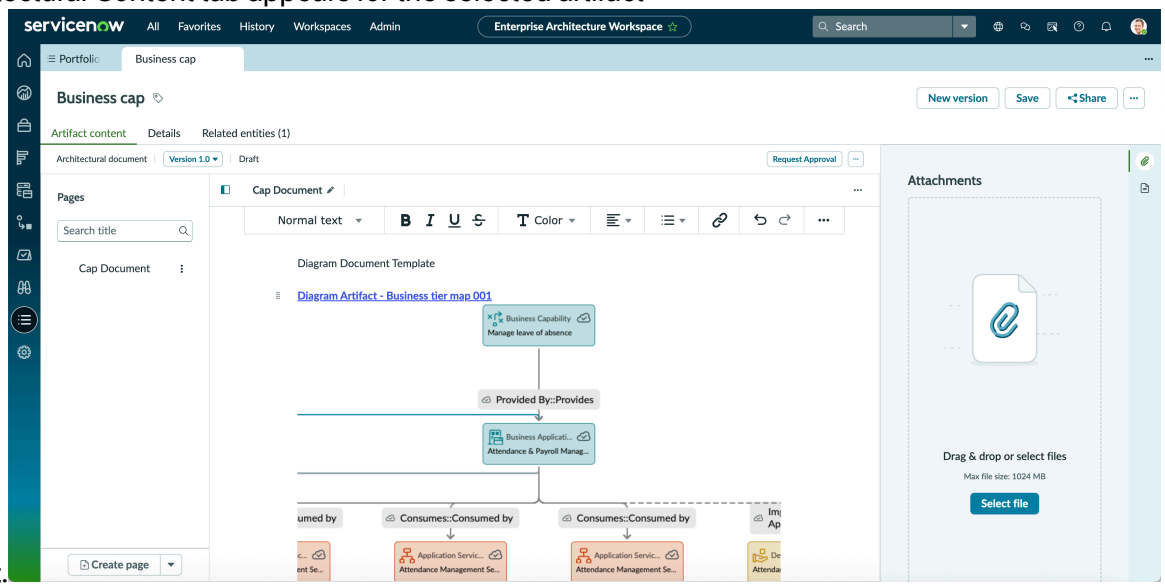
Role required: sn_apm.apm_user

Procedure

1. Navigate to **Workspace** > *`Enterprise Architecture Workspace`*.
2. Open the Portfolio List view by selecting the Portfolio icon .
3. Select the expand row icon ( ) next to **Information Portfolio**.

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4. Select **Architectural Documents**.
5. Select an existing architectural document.
   The Architectural Content tab appears for the selected artifact document.



6. Make edits to the content as per your requirement.
7. Select **Save**.

Related topics

- View all architectural documents
- Create an architectural document
- Working with the document templates

Edit an architectural document details

Edit an architectural document to update or modify details.

Before you begin

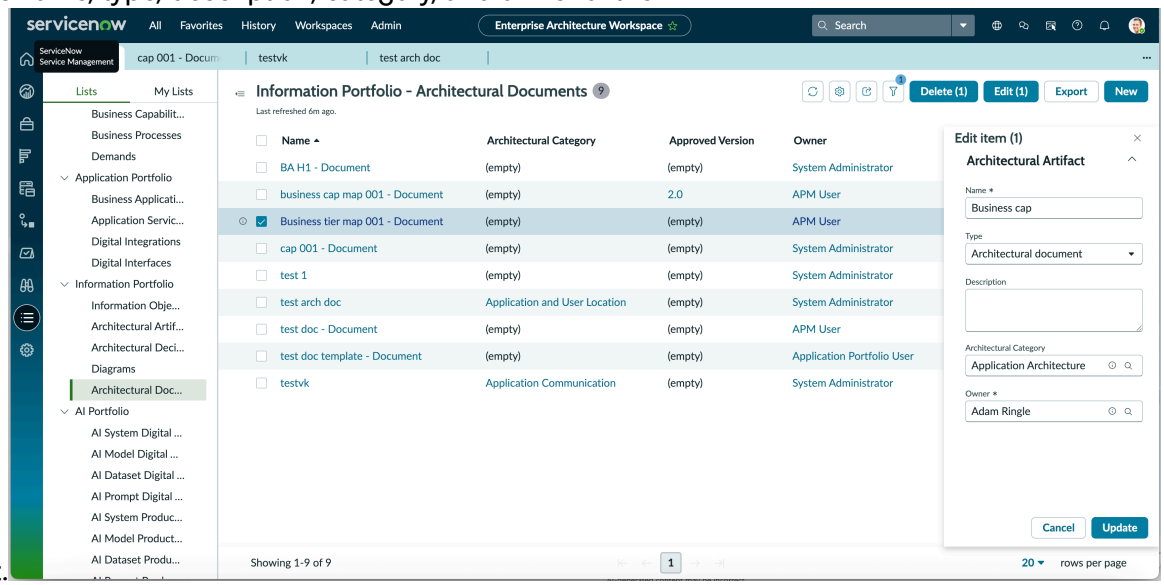
Role required: sn_apm.apm_user

Procedure

1. Navigate to **Workspace** > *`Enterprise Architecture Workspace`*.
2. Open the Portfolio List view by selecting the Portfolio icon .
3. Select the expand row icon ( ) next to **Information Portfolio**.
4. Select **Architectural Documents**.
5. Select a check box against an existing architectural document.
6. Select **Edit**.

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The artifact details opened in the right panel. Modify details such as name, type, description, category, and owner of the artifact.



7. Select **Update**.

Related topics

- View all architectural documents
- Create an architectural document
- Add a related entity to an architectural document
- Manage artifact content
- Delete an architectural document
- Edit artifact content of an architectural document
- Working with the document templates

Add a related entity to an architectural document

Associate an architectural artifact to existing entities such as business capabilities, business applications, digital integrations, and digital interfaces. The association creates a relationship between the artifact and related entities.

Before you begin

Role required: sn_apm.apm_user

Procedure

1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Portfolio List view by selecting the Portfolio icon .
3. Select the expand row icon ( ) next to **Information Portfolio**.
4. Select **Architectural Documents**.
5. Select the architectural document that you want to add a related entity to.
   A new page appears and the details of the architectural document are displayed.
6. Select the **Related Entities** tab.
7. Select **New**.

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8. On the form, fill in the fields.
   For a description of the field values, see Create related entities form.
9. Select **Save**.

Related topics

Create an architectural document

Edit artifact content of an architectural document

Working with the document templates

Manage artifact content

Manage artifact content of an architectural document performing actions such as creating new versions, sharing the document with users or groups.

In the Artifact content page of an architectural document you perform the following actions:

- **New version**- Use this button to create a new version for the opened architectural document. On the Create new version modal, you can select the check box to copy the content from the previous version.
- **Save**- Use this button to save any edits made to the content.
- **Share**- Use this button to share the architectural document with members or groups and provide an access level, such as Editor or Viewer. Optionally, you can enter a description for the users while sharing the document. For more details, see Share an architectural artifact with users or groups.
- **Delete**- From the More actions menu, use this button to delete a draft version of the architectural document.

  Note: Deleting an architectural record will result in the automatic deletion of all related records, such as related entities, artifact versions, and user and group permissions for the record. For more details, see Delete an architectural document

- **Request approval**- Use this button to request approval for an architectural document from the users who are part of the Enterprise Architect user group. For more details, see Request approval for an architectural artifact.
- **Delete a version**- Use this option to delete an architectural document version that is in the draft state. For more details, see Delete an architectural artifact version.

Related topics

View all architectural documents

Create an architectural document

Edit artifact content of an architectural document

Edit an architectural document details

Add a related entity to an architectural document

Working with the document templates

Delete an architectural document

Delete a draft version of an architectural document that you no longer require.

Before you begin

Role required: admin

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Note: Deleting an architectural record will result in the automatic deletion of all related records, such as related entities, artifact versions, and user and group permissions for the record.

Procedure

1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Portfolio List view by selecting the Portfolio icon .
3. Select the expand row icon ( ) next to **Information Portfolio**.
4. Select **Architectural Documents**.
5. Select the architectural document that you want to delete.
6. Select **Delete** from the More Actions menu.
   A warning message appears stating this action will delete all related records, such as related entities, artifact versions, and user and group permissions for the record.
7. Select **Delete** to proceed.
   The architectural document and its related records are deleted.

Related topics

View all architectural documents

Create an architectural document

Working with your entities

Manage all your Enterprise Architecture Workspace entities from a single place.

View your business capabilities

View the list of all your business capabilities that are created by you in the Enterprise Architecture Workspace.

Before you begin

Role required: sn_apm.apm_user

Procedure

1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Portfolio List view by selecting the Portfolio icon .
3. Select the expand row icon ( ) next to **My entities**.
4. Select **My Business Capabilities**.
   You can also view the list of capabilities from the Business Portfolio page. For more information, see Exploring a business portfolio.

Related topics

View business capabilities for a business application

Add a business capability to a business application

Remove business capabilities from a business application

Add or edit your business capabilities

Add or edit a business capability to align your organization's business goals.

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Before you begin
Role required: sn_apm.apm_analyst

Procedure
1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Portfolio List view by selecting the Portfolio icon  .
3. Select the expand row icon ( ) next to **My entities**.
4. Select **My Business Capabilities**.
5. Add or edit a capability.
   - To add a capability, select **New**.
   - To update details of an existing capability, select the capability, then select **Edit**.
6. On the form, fill in the fields.
   For field information, see Create business capability form.
7. Select **Save**.
   You can also add capabilities from the Business Portfolio page. For more information, see Add a business capability.

View your business processes

View the list of all business processes that are created by you in the Enterprise Architecture Workspace.

Before you begin
Role required: business_process_manager or asset or itil

Procedure
1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Portfolio List view by selecting the Portfolio icon  .
3. Select the expand row icon ( ) next to **My Entities**.
4. Select **My Business Processes**.

Related topics
- Add or edit your business processes
- View all business processes
- Add or edit a business process
- Manage architectural artifacts of a business process

Add or edit your business processes

Add or edit a business process to group applications that help accomplish a specific application service. A business process is a collection of related structured tasks performed to accomplish a specific application service.

Before you begin
Role required: business_process_manager or asset or itil

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Procedure

1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Portfolio List view by selecting the Portfolio icon  .
3. Select the expand row icon ( ) next to **My Entities**.
4. Select **My Business Processes**.
5. Add or edit a business process.
   - To add a business process, select **New**.
   - To update details of an existing business process, select the business process, then select **Edit**.
6. On the form, fill in the fields.
   For field information, see Create business process form.
7. Select **Save**.

Related topics

View your business processes

View all business processes

Add or edit a business process

Manage architectural artifacts of a business process

View your business applications

View the list of all your business applications that are created by you in the Enterprise Architecture Workspace.

Before you begin
Role required: sn_apm.apm_user

Procedure

1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Portfolio List view by selecting the Portfolio icon  .
3. Select the expand row icon ( ) next to **My Entities**.
4. Select **My Business Applications**.

Add or edit your business applications

Add the applications that your organization wants to introduce based on their functions and the business process they fulfill. In Enterprise Architecture, add or edit your business applications that are used to assess and track costs, usage, business value, functional fitment, and risks.

Before you begin
Role required: sn_apm.apm_analyst

Note: The user must be part of the Enterprise Architect Group.

About this task
If you have an Enterprise Architecture user role (sn_apm.apm_user), use the Business Application Life-cycle Management services to request, add, or retire a business application.

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Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Portfolio List view by clicking the Portfolio icon  .
3. Select the expand row icon ( ) next to **My Entities**.
4. Select **My Business Applications**.
5. Add or edit a business application.
   - To add a business application, select **Add**.
   - To update the details of an existing business application, select the record and then select **Edit**.
6. On the form, fill in the fields.

   For field information, see Business application form.
7. Select **Save** or **Update**.

Related topics

View your business applications

View all business applications

Add or edit a business application

Create a diagram for a business application

Open business application form in Core UI from EA Workspace

View a unified map for a business application

View roadmap of a business application

Manage information objects in EA Workspace

View architectural artifacts for a business application

Associate an architectural artifact with a business app

Add an architectural artifact to a business application

Remove architectural artifacts from a business application

View your application services

View the list of application services created by you in the Enterprise Architecture Workspace.

Before you begin

Role required: sn_apm.apm_user

Procedure

1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Portfolio List view by selecting the Portfolio icon  .
3. Select the expand row icon ( ) next to **My Entities**.
4. Select **My Application Services**.

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Related topics

Add or edit your application services

View all application services

Add or edit an application service in the Enterprise Architecture Workspace

Add or edit your application services

Add or edit an application service created by you in the Enterprise Architecture Workspace.

Before you begin
Role required: sn_apm.apm_analyst

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Portfolio List view by clicking the Portfolio icon  .
3. Select the expand row icon ( ) next to **My Entities**.
4. Select **My Application Services**.
5. Add or edit an application service.
   - To add an application service, select **Add**.
   - To update details of an existing application service, select the record then select **Edit**.
6. On the form, fill in the fields.

   For field information, see Application service form.
7. Select **Save** or **Update**.

Related topics

View your application services

View all application services

Add or edit an application service in the Enterprise Architecture Workspace

View your information objects

View the list of information objects created by you in the Enterprise Architecture Workspace.

Before you begin
Role required: sn_apm.apm_user

Procedure

1. Navigate to **Workspace** > *`Enterprise Architecture Workspace`*.
2. Open the Portfolio List view by selecting the Portfolio icon  .
3. Select the expand row icon ( ) next to **My Entities**.
4. Select **My Information Objects**.

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Related topics

- Add or edit your information objects
- View all information objects
- Add or edit an information object

Add or edit your information objects

Add or edit an information object to capture the logical data for a business application.

Before you begin

Role required: admin

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Portfolio List view by selecting the Portfolio icon  .
3. Select the expand row icon ( ) next to **My Entities**.
4. Select **My Information Objects**.
5. Add or edit an information object.
   - To add an information object, select **New**.
   - To update details of an existing information object, select the information object, then select **Edit**.
6. Fill in the form fields.
   For field information, see Create information object form.
7. Select **Save**.

Related topics

- View your information objects
- View all information objects
- Add or edit an information object

View your architectural artifacts

View the list of all your architectural artifacts created by you in the Enterprise Architecture Workspace.

Before you begin

Role required: sn_apm.apm_user

Procedure

1. Navigate to **Workspace** > *`Enterprise Architecture Workspace`*.
2. Open the Portfolio List view by selecting the Portfolio icon  .
3. Select the expand row icon ( ) next to **My Entities**.
4. Select **My Architectural Artifacts**.

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Related topics

- Add or edit your architectural artifacts
- View all architectural artifact categories
- View all architectural artifacts
- Create or edit an architectural artifact from Portfolio page
- Add a related entity to an architectural artifact
- Share an architectural artifact with users or groups
- Manage access to architectural artifacts
- Request approval for an architectural artifact
- Download an architectural artifact version
- Delete an architectural artifact version

Add or edit your architectural artifacts

Add or edit an architectural artifact to align it with your business requirements.

Before you begin

Role required: sn_apm.apm_user

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Portfolio List view by selecting the Portfolio icon  .
3. Select the expand row icon ( ) next to **My Entities**.
4. Select **My Architectural Artifacts**.
5. Add or edit an architectural artifact.
   - To add an architectural artifact, select **New**.
   - To update details of an existing architectural artifact, select the architectural artifact, then select **Edit**.
6. Fill in the form fields.
   For field information, see Create architectural artifact form.
7. Select **Save**.

Related topics

- View your architectural artifacts
- View all architectural artifact categories
- View all architectural artifacts
- Create or edit an architectural artifact from Portfolio page
- Add a related entity to an architectural artifact
- Share an architectural artifact with users or groups
- Manage access to architectural artifacts
- Request approval for an architectural artifact

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Download an architectural artifact version

Delete an architectural artifact version

View your TRM products

View all your Technology Reference Model (TRM) products in the Enterprise Architecture Workspace. TRM allows you to define the standards for your software and hardware products and manage unapproved products in your organization.

Before you begin

Role required: admin

Procedure

1. Navigate to **Workspaces** > *Enterprise Architecture Workspace*.
2. Open the Portfolio List view by clicking the Portfolio icon  .
3. Select the expand row icon ( ) next to **My Entities**.
4. Select **My** *Technology Reference Model* **Products**.

Related topics

Add or edit your TRM products

View all TRM phases

View all TRM categories

View all TRM products grouped by product category

View all TRM products

Request a TRM product in Enterprise Architecture Workspace

Request a TRM product lifecycle in Enterprise Architecture Workspace

Create a TRM product in Enterprise Architecture Workspace

Associate an Architectural Artifact to a TRM product

Create TRM product lifecycles in Enterprise Architecture Workspace

View Technology Reference Model technical debts

Update TRM technical debt data using scheduled job

Add or edit your TRM products

Add a software product to the Technology Reference Model (TRM) library or edit an existing product details and maintain the TRM library for your organization.

Before you begin

You must be part of the Enterprise Architect Group.

Role required: sn_apm.apm_analyst

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Portfolio List view by selecting the portfolio icon  .
3. Select the expand row icon ( ) next to **My Entities**.

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4. Select *Technology Reference Model* **Products**.
5. Add or edit a TRM product.
   - To add a product, select **New**.
   - To update a product details, select a TRM product, then select **Edit**.
6. On the TRM Product form, fill in the fields.

   For field information, see Create TRM product form.
7. Select **Save**.

Related topics

- View your TRM products
- View all TRM phases
- View all TRM categories
- View all TRM products grouped by product category
- View all TRM products
- Request a TRM product in Enterprise Architecture Workspace
- Request a TRM product lifecycle in Enterprise Architecture Workspace
- Create a TRM product in Enterprise Architecture Workspace
- Associate an Architectural Artifact to a TRM product
- Create TRM product lifecycles in Enterprise Architecture Workspace
- View Technology Reference Model technical debts
- Update TRM technical debt data using scheduled job

View your digital integrations

View the list of all digital integrations created by you in the Enterprise Architecture Workspace.

Before you begin
Role required: sn_apm.apm_user

Procedure

1. Navigate to **Workspaces** > *Enterprise Architecture Workspace*.
2. Open the Portfolio List view by clicking the Portfolio icon  .
3. Select the expand row icon ( ) next to **My Entities**.
4. Select **My Digital Integrations**.

Related topics

- Add or edit your digital integrations
- View all digital integrations
- Add or edit a digital integration in the EA Workspace
- Manage architectural artifacts of a digital integration in EA Workspace
- Associate an information object to a digital integration

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Add or edit your digital integrations

Add a digital integration or edit an existing digital integration created by you in the EA Workspace.

Before you begin

Role required: sn_apm.apm_analyst

About this task

The digital integration is a design object used by the Enterprise Architects. It describes a connection between two business applications or between a business application and an external service (for example: AWS, Yahoo, a TimeZone Conversion service) that provides an interface (API) to interact with.

The digital integration form helps you define why a connection is required between two data entities. You can define the interface where they should communicate. You can provide a link to relevant designs and architectural material in the description. A Digital Integration underpins a business capability and provides business value.

Procedure

1. Navigate to **Workspaces** > *`Enterprise Architecture Workspace`*.
2. Open the Portfolio List view by selecting the Portfolio icon ( ).
3. Select the expand row icon ( ) next to **My Entities**.
4. Select **My Digital Integrations**.
5. Add or edit a digital integration.
   - To add a digital integration, select **New** or **New (Easy form)**.
   - To update an existing digital integration, select the digital integration, select **Edit**.
6. On the **Digital Integration** form, fill in the fields.

   For a description of the field values, see Digital integration form (easy form) in EA Workspace or Digital integration form in EA Workspace.

7. Select **Add** or **Update**.

Related topics

View your digital integrations

View all digital integrations

Add or edit a digital integration in the EA Workspace

Manage architectural artifacts of a digital integration in EA Workspace

Associate an information object to a digital integration

View your digital interfaces

View the list of all digital interfaces that are created by you in the Enterprise Architecture Workspace.

Before you begin

Role required: sn_apm.apm_user

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Procedure

1. Navigate to **Workspaces** > *Enterprise Architecture Workspace*.
2. Open the Portfolio List view by clicking the Portfolio icon  .
3. Select the expand row icon ( ) next to **My Entities**.
4. Select **My Digital Interfaces**.

Related topics

- Add or edit your digital interfaces
- View all digital interfaces
- Add or edit a digital interface in the EA Workspace
- Connect a digital interface with the CMDB API in the EA Workspace
- Manage architectural artifacts of a digital interface
- Relate an SDLC component to a digital interface
- Relate an information object to a digital interface
- Relate credentials to a digital interface

Add or edit your digital interfaces

Add or edit a digital interface for an integration to describe how business applications can interact.

Before you begin

Role required: sn_apm.apm_analyst

About this task

Each business application or an application service you interact with provides a logical high-level description of how to interface with the application or service. The digital interface is an object used in the design phase to describe how other services or business applications can interact. At the same level, you can define which information objects are provided or updated by this digital interface.

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Portfolio List view by selecting the Portfolio icon ( ).
3. Select the expand row icon ( ) next to **My Entities**.
4. Select **My Digital Interfaces**.
5. Create or update a digital interface.
   - To create an interface, select **New**.
   - To update an existing interface, select a digital integration, then select **Edit**.
6. On the Digital Interface form, fill in the fields.

   For field information, see Digital interface form.
7. Select **Save**.

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Related topics

- View your digital interfaces
- View all digital interfaces
- Add or edit a digital interface in the EA Workspace
- Connect a digital interface with the CMDB API in the EA Workspace
- Manage architectural artifacts of a digital interface
- Relate an SDLC component to a digital interface
- Relate an information object to a digital interface
- Relate credentials to a digital interface

Working with application Total Cost of Ownership (TCO)

The Application Total Cost of Ownership (TCO) plugin helps Enterprise Architects evaluate the cost of business applications. Use application costs to prioritize the application portfolio and align with the organization's business strategy.

View all total cost of ownership records

View the list of all total cost of ownership (TCO) records in the Enterprise Architecture Workspace.

Before you begin
Role required: admin

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Portfolio List view by selecting the Portfolio icon  .
3. Select the expand row icon ( ) next to **Application Portfolio**.
4. Select **Total Cost of Ownership**.

Related topics

- Add or edit a total cost of ownership record
- Manage application total cost of ownership (TCO) in Enterprise Architecture Workspace
- Install the Application Total Cost of Ownership (TCO) plugin
- Create a source for an Application TCO
- Create a TCO source cost type
- Create a cost type for Application TCO in Enterprise Architecture Workspace
- Set the fiscal period property for TCO dashboards

Add or edit a total cost of ownership record

Create a new entry for total cost of ownership (TCO) record to evaluate the cost of your business applications.

Before you begin
Role required: admin

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Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Portfolio List view by selecting the Portfolio icon  .
3. Select the expand row icon ( ) next to **Application Portfolio**.
4. Select **Total Cost of Ownership**.
5. Add or edit a TCO record.
   - To add a new TCO record, select **New**.
   - To update details of an existing TCO record, select the information object.
6. Select **New**.
7. Fill in the form fields.
   For field information, see Total cost of ownership form.
8. Select **Save**.

Related topics

View all total cost of ownership records

Manage application total cost of ownership (TCO) in Enterprise Architecture Workspace

Install the Application Total Cost of Ownership (TCO) plugin

Create a source for an Application TCO

Create a TCO source cost type

Create a cost type for Application TCO in Enterprise Architecture Workspace

Set the fiscal period property for TCO dashboards

Working with digital integration management in Enterprise Architecture Workspace

Manage digital integrations and digital interfaces in Enterprise Architecture Workspace.

Managing digital integrations and interfaces in the Enterprise Architecture Workspace allows you to understand, govern, and track interactions between business applications, supporting business processes, information flows, and overall application connectivity. It enables proactive issue identification, complete governance over interfaces, and improved management of integration metadata and lifecycle stages.

Working with digital integrations

Add or edit a digital integration, manage architectural artifacts, and information objects of a digital integration in Enterprise Architecture Workspace.

Register a digital integration conversationally

Use the conversational experience of ServiceNow Otto in Virtual Agent to register a digital integration from any application that supports Virtual Agent.

Before you begin

Note: Depending on your license, you will have access to certain application features, generative AI skills, agentic workflows, and AI agents. For more information, see ServiceNow product tiers.

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Ensure that the following tasks are completed:

- Install an application that supports Virtual Agent.
- Complete configuring the conversational experiences for Enterprise Architecture. For more information, see Configure ServiceNow Otto for Enterprise Architecture (EA).

Role required: none

About this task

In the application that supports Virtual Agent, for example Employee Service Center, start with a prompt to register a business application in the chat. Through a series of questions, Virtual Agent prompts you to provide information for the questions that you configured for a catalog item. ServiceNow Otto in Virtual Agent understands the context and maps the information that you provide to an appropriate catalog item. In this case, the catalog item is a business application.

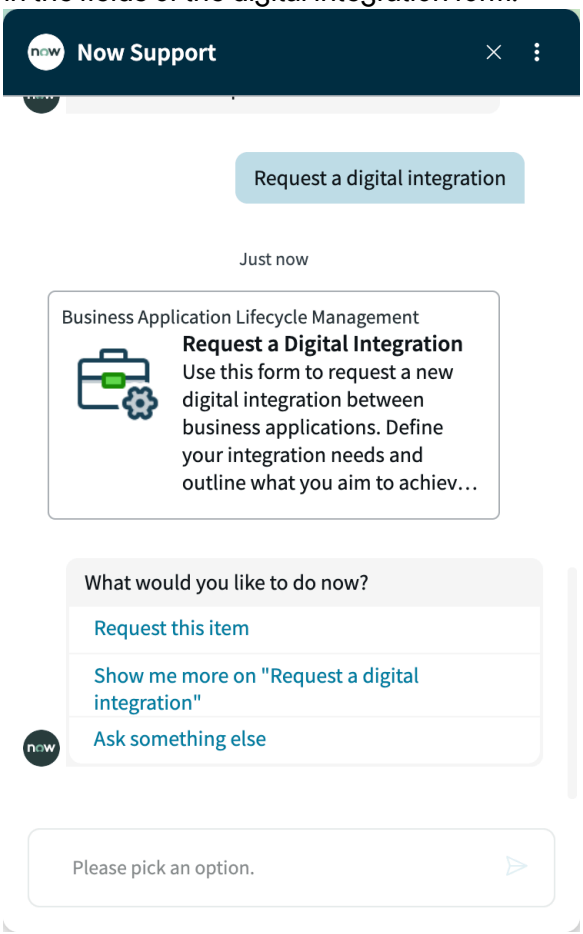
Procedure

1. Navigate to **All** > **Self-Service** > **Employee Center**.
2. Select **Open chat window**.
3. Enter an instruction to start the conversation with Virtual Agent.

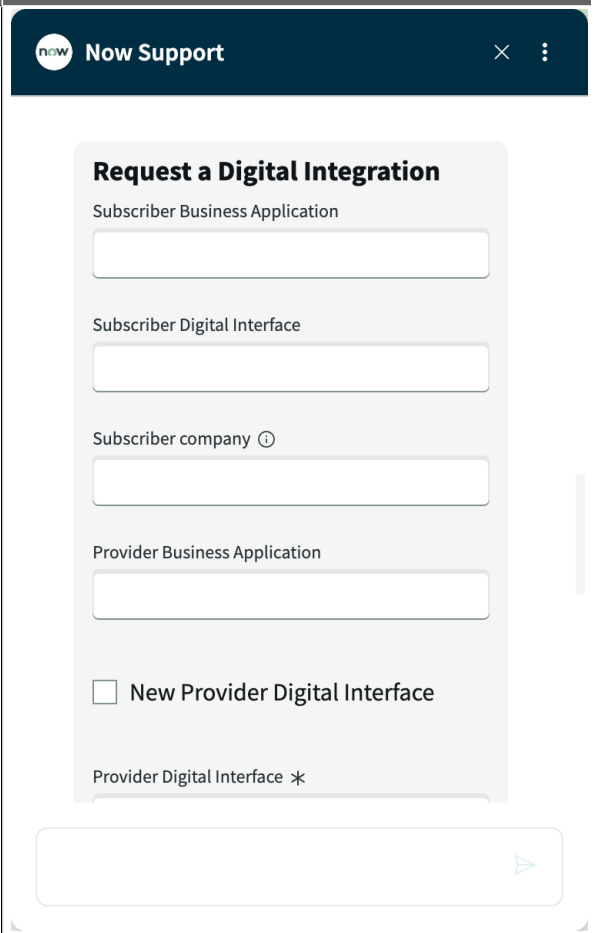
   You can start with a basic instruction such as **Request a digital integration** or an elaborate instruction that includes the digital integration information. The following examples show how each instruction is handled in the chat.

Instruction	Description
Short: Request a digital integration	Virtual Agent starts a conversation to ask more information from you about the business application, through a series of questions: ○ What is the name of the business application for which you want to subscribe? ○ What is the business application you're requesting for? ○ Is this a new provider digital interface? ○ [Required] What is the name of the Provider Digital Interface? ○ Who is the IT Owner for this request? ○ What type of business do you own? ○ What type of subscriber are you? ○ Can you please describe the digital integration you would like to enter?

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Instruction	Description
	The information you provide is used to fill in the fields of the digital integration form. 
Elaborate: Request the new digital integration for the subscriber business application BuyIt and provider business application is Case Management.	Using the context that you provided, Virtual Agent automatically matches it to the relevant field on the business application form. It then instructs you to enter information of only those fields that you haven't provided.

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Instruction	Description
	

4. Review the information that Virtual Agent filled in for the digital integration form fields. You can choose to make changes or submit.

Related topics

Exploring ServiceNow Otto for Enterprise Architecture (EA)

Configure ServiceNow Otto for Enterprise Architecture (EA)

ServiceNow Otto for Enterprise Architecture (EA) access roles

View all digital integrations

View the list of all your digital integrations in the Enterprise Architecture Workspace.

Before you begin

Role required: sn_apm.apm_read

Procedure

1. Navigate to **Workspaces** > *Enterprise Architecture Workspace*.
2. Open the Portfolio List view by clicking the Portfolio icon ( ).
3. Select the expand row icon ( ) next to **Application Portfolio**.
4. Select **Digital Integrations**.

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Related topics

- Add or edit a digital integration in the EA Workspace
- Manage architectural artifacts of a digital integration in EA Workspace
- Associate an information object to a digital integration

Add or edit a digital integration in the EA Workspace

Add a digital integration or edit an existing digital integration in the EA Workspace. The digital integration is a design object used by the Enterprise Architects. It describes a connection between two business applications or between a business application and an external service (for example: AWS, Yahoo, a TimeZone Conversion service) that provides an interface (API) to interact with.

About this task

The digital integration form helps you define why a connection is required between two data entities. You can define the interface where they should communicate. You can provide a link to relevant designs and architectural material in the description. A Digital Integration underpins a business capability and provides business value.

Before you begin

Role required: sn_apm.apm_analyst

Procedure

1. Navigate to **Workspaces** > *Enterprise Architecture Workspace*.
2. Open the Portfolio List view by selecting the Portfolio icon ( ).
3. Select the expand row icon ( ) next to **Application Portfolio**.
4. Select **Digital Integrations**.
5. Add or edit a digital integration.
   - To add a digital integration, select **New** or **New (Easy form)**.
   - To update an existing digital integration, select the digital integration, select **Edit**.
6. On the **Digital Integration** form, fill in the fields.

   For a description of the field values, see Digital integration form (easy form) in EA Workspace or Digital integration form in EA Workspace.

7. Select **Add** or **Update**.

Result

After submission of the form, within the CMDB platform, a CI relationship (Interfaces::Interfaced By) gets created between provider and subscriber business applications. If the digital interface has no relation to a business application (using Open or Public API), the digital integration is created between the subscriber business application and a standalone digital interface.

Related topics

- Manage architectural artifacts of a digital integration in EA Workspace
- Associate an information object to a digital integration
- View all digital integrations

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Manage architectural artifacts of a digital integration in EA Workspace

You can create new, add, or remove the architectural artifacts that are associated with a digital integration.

Before you begin

Role required: sn_apm.apm_user

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Portfolio List view by selecting the Portfolio icon ( ).
3. Select the expand row icon ( ) next to **Application Portfolio**.
4. Select **Digital Integrations**.
5. Select the name of a digital integration to view the associated artifacts.
6. Select the **Architectural Artifacts** tab.
   A list of artifacts associated with the digital integration is displayed.
7. To link an existing artifact to the digital integration, select **Add**.
   In the **Add architectural** artifact pop-up window, select the existing artifact that you want to link to the digital integration and select **Ok**.
8. Create or remove an artifact.
   - To create an artifact and associate it with the digital integration, select **New**.
   - To remove an existing architectural artifact, select the artifact and then select **Remove**.
9. Fill in the form fields.
   For field information, see Create architectural artifact form.
10. Select **Save**.

Related topics

Associate an information object to a digital integration

Add or edit a digital integration in the EA Workspace

View all digital integrations

Associate an information object to a digital integration

Associate an information object to a digital integration in the Enterprise Architecture Workspace.

Before you begin

Role required: sn_apm.apm_analyst

Procedure

1. Navigate to **All** > **Workspaces** > **Enterprise Architecture Workspace**.
2. In the left navigation, open the Portfolio List view by selecting the Portfolio icon ( ).
3. Select the expand row icon ( ) next to **Application Portfolio**.
4. Select **Digital Integrations**.
5. Select an existing digital integration.
6. Select the **Information Objects** tab.
7. Select **New**.

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8. On the Digital Integration Information Object form, select the information object.
9. Select **Save**.

Related topics

View all digital integrations

Add or edit a digital integration in the EA Workspace

Manage architectural artifacts of a digital integration in EA Workspace

Example: Provider and subscriber with data flow directions

The provider and subscriber roles are independent of the data flow direction. The following example illustrates how the same provider and subscriber pairing can support both outgoing and incoming data flow directions.

Use case: Provision employee data to create human case agents

- **Provider Business Application:** Corporate repository, for example, Active Directory
- **Subscriber Business Application:** *ServiceNow* platform

This integration supports two data flow directions:

Outgoing: Provider to Subscriber

Active Directory runs a scheduled job and pushes the latest employee updates to the *ServiceNow* platform every four hours. The provider (Active Directory) initiates the connection, so the data flow direction is outgoing.

Incoming: Subscriber to Provider

The *ServiceNow* platform connects through a MID Server to the on-premises corporate repository, which exposes an LDAP interface, and pulls the latest changes every four hours. The subscriber (*ServiceNow* platform) initiates the connection, so the data flow direction is incoming.

In both cases, Active Directory remains the provider because it owns the digital interface. The **Data Flow Direction** field reflects which application initiates the connection, not which application owns the data.

Working with digital interfaces

Add or edit digital interfaces, connect them to CMDB APIs, manage artifacts, and relate SDLC components, information objects, and credentials in the Enterprise Architecture Workspace.

View all digital interfaces

View the list of all your digital interfaces in the Enterprise Architecture Workspace.

Before you begin

Role required: sn_apm.apm_read

Procedure

1. Navigate to **Workspaces** > *Enterprise Architecture Workspace*.
2. Open the Portfolio List view by clicking the Portfolio icon ( ).
3. Select the expand row icon ( ) next to **Application Portfolio**.
4. Select **Digital Interfaces**.

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Related topics

- Add or edit a digital interface in the EA Workspace
- Connect a digital interface with the CMDB API in the EA Workspace
- Manage architectural artifacts of a digital interface
- Relate an SDLC component to a digital interface
- Relate an information object to a digital interface
- Relate credentials to a digital interface

Add or edit a digital interface in the EA Workspace

Add or edit a digital interface for an integration to describe how business applications can interact.

About this task

Each business application or an application service you interact with provides a logical high-level description of how to interface with the application or service. The digital interface is an object used in the design phase to describe how other services or business applications can interact. At the same level, you can define which information objects are provided or updated by this digital interface.

Before you begin

Role required: sn_apm.apm_analyst

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Portfolio List view by selecting the Portfolio icon ( ).
3. Select the expand row icon ( ) next to **Application Portfolio**.
4. Select **Digital Interfaces**.
5. Create or update a digital interface.
   - To create an interface, select **New**.
   - To update an existing interface, select a digital integration link to open it.
6. On the Digital Interface form, fill in the fields.

   For field information, see Digital interface form.
7. Select **Save**.

Related topics

- View all digital interfaces
- Relate an SDLC component to a digital interface
- Manage architectural artifacts of a digital interface
- Relate credentials to a digital interface
- Relate an information object to a digital interface
- Connect a digital interface with the CMDB API in the EA Workspace

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Connect a digital interface with the CMDB API in the EA Workspace

Create a relationship between a digital interface and a CMDB API. The relationship shows which digital integration uses which API and which APIs are built from the digital interface design specs. You can also see what environments are deployed and group the deployed APIs.

Before you begin

Activate the CMDB CI Class Models [app-cmdb-content] store app (version 1.49.0 or later). For instructions, see CMDB CI Class Models app.

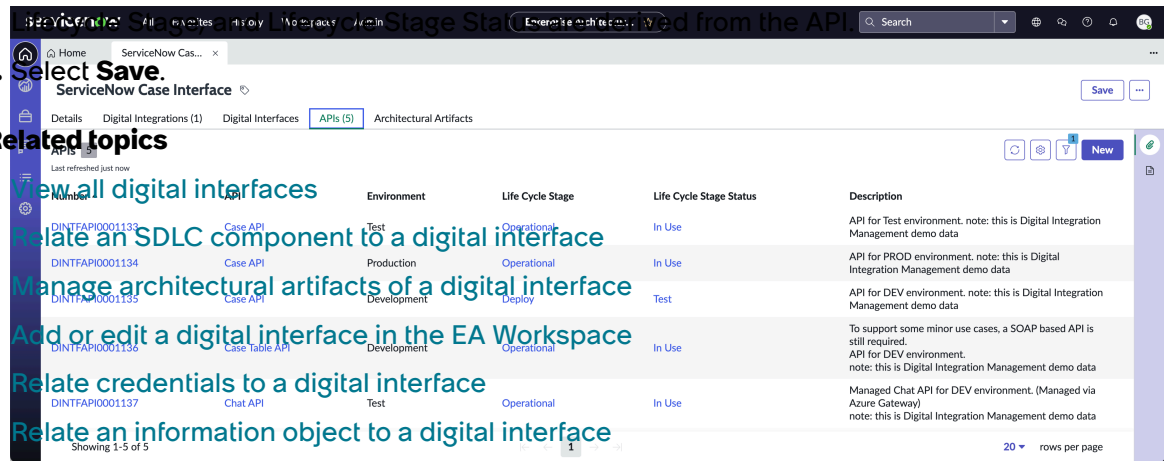
Role required: sn_apm.apm_analyst

About this task

One digital interface can be connected to one or more APIs. One API can be connected to only one digital interface.

Procedure

1. Navigate to **All** > **Workspaces** > **Enterprise Architecture Workspace**.
2. In the left navigation, open the Portfolio List view by selecting the Portfolio icon ( ).
3. Select the expand row icon ( ) next to **Application Portfolio**.
4. Select **Digital Interfaces**.
5. Select an existing digital interface.
6. Select the **APIs** tab.
7. Select **New**.
8. On the Digital Interface to API form, fill in the fields.
   For field descriptions, see Digital interface to API form. Information for the fields Environment, Life Cycle Stage, and Life Cycle Stage Status is inherited from the API.



9. Select **Save**.

Related topics

View all digital interfaces
Relate an SDLC component to a digital interface
Manage architectural artifacts of a digital interface
Add or edit a digital interface in the EA Workspace
Relate credentials to a digital interface
Relate an information object to a digital interface

Manage architectural artifacts of a digital interface

You can create new, add, or remove the architectural artifacts that are associated with a digital interface.

Before you begin

Role required: sn_apm.apm_user

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Portfolio List view by selecting the Portfolio icon ( ).
3. Select the expand row icon ( ) next to **Application Portfolio**.
4. Select **Digital Interfaces**.

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Relate an SDLC component to a digital interface

Associate an SDLC component to a digital interface in the Enterprise Architecture Workspace. The SDLC components represent the artifacts or configurations that are used to implement an Interface.

Before you begin

Activate the CMDB CI Class Models [app-cmdb-content] store app (version 1.49.0 or later). For instructions, see CMDB CI Class Models app.

Note: You must have the read access to the cmdb_ci_sdlc_component table to view the SDLC component tab in the digital interface related list

Role required: sn_apm.apm_analyst

Procedure

1. Navigate to **All** > **Workspaces** > **Enterprise Architecture Workspace**.
2. In the left navigation, open the Portfolio List view by selecting the Portfolio icon ( ).
3. Select the expand row icon ( ) next to **Application Portfolio**.
4. Select **Digital Interfaces**.
5. Select an existing digital interface.
6. Select the **SDLC Components** tab.
7. Select **New**.
8. On the Digital Interface SDLC Component form, fill in the fields.
   For field descriptions, see Digital interface SDLC component form.
9. Select **Save**.

Related topics

- View all digital interfaces
- Manage architectural artifacts of a digital interface
- Add or edit a digital interface in the EA Workspace
- Relate credentials to a digital interface
- Relate an information object to a digital interface
- Connect a digital interface with the CMDB API in the EA Workspace

Relate an information object to a digital interface

Associate an information object to a digital interface in the Enterprise Architecture Workspace. You can also define how the information object should be consumed within the digital interface.

Before you begin

Role required: sn_apm.apm_analyst

About this task

A digital interface is related to a business application, and the business application will have related information objects. You can use this relationship to get the logical data of the information object, which can be used to leverage the business application.

Prior to linking the information objects to a digital interface that is provided by a business application, ensure that the information objects are linked to the business application. The

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Information Object field on the Create New Digital Interface Information Object form, shows the filtered list of information objects. For a digital interface provided by a company, you can select any available information object.

Procedure

1. Navigate to **All** > **Workspaces** > **Enterprise Architecture Workspace**.
2. In the left navigation, open the Portfolio List view by selecting the Portfolio icon ( ).
3. Select the expand row icon ( ) next to **Application Portfolio**.
4. Select **Digital Interfaces**.
5. Select an existing digital interface.
6. Select the **Information Objects** tab.
7. Select **New**.
8. On the Create New Digital Interface Information Object form, fill in the fields.
   For field descriptions, see Digital interface information object form.
9. Select **Save**.

Related topics

- View all digital interfaces
- Relate an SDLC component to a digital interface
- Manage architectural artifacts of a digital interface
- Add or edit a digital interface in the EA Workspace
- Relate credentials to a digital interface
- Connect a digital interface with the CMDB API in the EA Workspace

Relate credentials to a digital interface

Relate and manage integration user and account for a digital interface to track which user is assigned to which digital interface.

Before you begin

Role required: sn_apm.apm_analyst

About this task

You can also relate credentials to from a business application record or from a digital integration record.

Procedure

1. Navigate to **All** > **Workspaces** > **Enterprise Architecture Workspace**.
2. In the left navigation, open the Portfolio List view by selecting the Portfolio icon ( ).
3. Select the expand row icon ( ) next to **Application Portfolio**.
4. Select **Digital Interfaces**.
5. Select an existing digital interface.
6. Select the **Credentials** tab.
7. Select **New**.
8. On the Create New Credential form, fill in the fields.

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For field descriptions, see Digital interface credentials form.

9. Select **Save**.

Related topics

- View all digital interfaces
- Add or edit a digital interface in the EA Workspace
- Connect a digital interface with the CMDB API in the EA Workspace
- Manage architectural artifacts of a digital interface
- Relate an SDLC component to a digital interface
- Relate an information object to a digital interface

Working with the publishing center

Use the Publishing Center to make architecture content accessible and actionable across the enterprise.

Publishing Center in Enterprise Architecture Workspace

Use the Publishing Center to publish Enterprise Architecture content such as Technology Reference Model (TRM) catalogs to the Knowledge Base, monitor publishing workflows, and maintain publishing history with full governance and visibility.

The Publishing Center in Enterprise Architecture Workspace supports publishing Enterprise Architecture content that is designed to be consumed beyond the Enterprise Architecture Workspace.

Currently, the Publishing Center enables you to:

- Publish Technology Reference Model (TRM) catalogs to the ServiceNow Knowledge Base
- Configure publishing rules for:
  - TRM Products
  - TRM Lifecycle phases
  - Displayed attributes

This helps you to generate and manage knowledge base representations of approved technology standards.

Related topics

- Exploring the publishing center in Enterprise Architecture Workspace
- Create a configuration to publish TRM data
- Publish a TRM catalog to the knowledge base
- Access the published TRM catalog knowledge base
- Understanding the publishing results and knowledge base output
- Technology Reference Model in Enterprise Architecture Workspace

Published TRM catalog experience

When you publish a Technology Reference Model (TRM) catalog from the Publishing Center, the system generates a Knowledge Base catalog that presents approved technology standards in a consumable, read-only format.

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What you can see after publishing

After a TRM catalog is published, you can access it as Knowledge Base content:

- A TRM catalog appears in the Knowledge Base with categories that help you browse and filter products.
- Each TRM product is published as an individual Knowledge Base article.
- Each product article displays product metadata based on the publishing configuration, including only the fields selected by the administrator.
- The order of fields in the article reflects the order configured in the Publishing Center.
- TRM product lifecycle information is displayed as a table within the article. As an Administrator user you can control:
  - Which lifecycle records are included
  - Which columns are displayed
  - The order of lifecycle columns

This structure ensures that you can see consistent, curated technology standards without accessing the Enterprise Architecture Workspace.

Access type and visibility

When creating a publishing configuration, as an administrator user you can select an access type that determines who can view the published catalog:

- **Internal**: Only authenticated users with access to the Knowledge Base can view the catalog.
- **Public**: The catalog can be made available to guest users, depending on portal configuration.

Note: For public catalogs, the associated portal pages must be configured to allow guest access. Portal configuration determines, where and how the catalog is exposed.

Where the catalog can be accessed

Because the output is Knowledge Base content, the published TRM catalog can be surfaced in multiple portals, such as:

- Service Portal
- Employee Portal
- Other custom portals built on ServiceNow

Portal visibility is managed by associating the knowledge base with one or more portals in the Publishing Center.

How published content stays up to date

After publishing, the system keeps the Knowledge Base articles synchronized with TRM data:

- Updates to TRM product fields and lifecycle data are reflected automatically in the published articles.
- Date-driven lifecycle phase changes are updated automatically as phases transition.

This synchronization ensures that published technology standards remain current without requiring repeated publishing for routine data updates.

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Note: Some structural changes, such as renaming TRM phases or categories, require the catalog to be republished to apply the updates consistently across all articles.

Related topics

- Create a configuration to publish TRM data
- Publish a TRM catalog to the knowledge base
- View publishing status and run log
- Access the published TRM catalog knowledge base
- Understanding the publishing results and knowledge base output

Create a configuration to publish TRM data

Define configuration for a Technology Reference Model (TRM) catalog that can be published to the knowledge base article.

Before you begin

Role required: sn_apm.apm_admin and knowledge_admin

About this task

https://service-now.portal.trainn.co/share/2bBv8hxFD1neFqyFsvlhWA/embed?autoplay=false

Publishing a TRM catalog involves creating a publishing configuration in the Publishing Center and executing it to generate knowledge base content.

Note: If you can't republish the catalog due to permissions, contact a knowledge administrator to republish and apply the changes.

Procedure

1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Setup page by selecting the Setup icon .
3. Select the expand row icon ( ) next to **Publishing Center**.
4. Select **All**.
5. Select **New**.
6. On the form, fill in the fields.

   For field information, see Create publishing configuration form.
7. Select **Save**.

   The details are saved and the configuration is available in the Publishing Center list.

   After a publishing configuration is created, the **Catalog type** and **Access type** fields become read-only.

Result

When you create a new TRM publishing configuration, the system automatically creates default publishing components. The following related records are created automatically:

- **Article configurations**- For TRM, this tab displays the Software and Hardware product links along with display fields to appear on the knowledge base. By default, system displays the article configuration and content configuration for the product to be published. You can open

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the links to modify the article configuration and life cycle configuration. For more details, see Edit a published TRM catalog configuration.

- **Portals**- displays associated portals, where the knowledge base is published. You can associate a new knowledge base to the service portal. For more details, see Associate a portal to the knowledge base.

  Note: You can see this tab only when you have the Service Portal admin (sp_admin) role assigned to you.

- **Run logs**- displays the publishing status. You can also open the run log link and article configuration links to see all details for the published catalog. For more details, see View publishing status and run log.

Related topics

Edit a published TRM catalog configuration

Associate a portal with a knowledge base

Publish a TRM catalog to the knowledge base

View publishing status and run log

Access the published TRM catalog knowledge base

Understanding the publishing results and knowledge base output

Edit a published TRM catalog configuration

Edit a published TRM catalog configuration to update catalog name, article publishing rules for software and hardware records, or manage portal and knowledge base mappings.

Before you begin

Role required: sn_apm.apm_admin and knowledge_admin

About this task

When you update and save changes to a published catalog configuration, the catalog status changes from Published to Draft. You must republish the catalog to apply updates to the knowledge base.

Procedure

1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Setup page by selecting the Setup icon  .
3. Select the expand row icon ( ) next to **Publishing Center**.
4. Select **All**.
5. Select an existing catalog to modify its configuration.
   You can modify the following details:
   - Update catalog details- In the **Details** tab, modify the catalog name.
   - Update article publishing rules- In the **Article configurations** tab, select a software or hardware record to open its configuration and update details and its content configuration.

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- **Details** tab- Define the content structure using AND/OR operators, modify display fields, and select or clear the **Active** check box to make the record active or inactive.
- **Content configurations**- Select a related configuration (for example, Product lifecycles). Define the content structure using AND/OR operators and modify display fields. Select or clear the **Active** check box to make the record active or inactive.

- Manage portal–knowledge base mappings- In the **Portals** tab, create or update a portal mapping for your published catalog, set the order for the knowledge base, and select or clear the **Active** check box to make the record active or inactive.

6. Select **Save**.

Result
The publishing configuration is updated based on your changes.

What to do next
You must republish to apply changes to the published knowledge base output. Use the Run logs to monitor the publishing job and confirm completion.

Related topics
- Republish a TRM catalog after updates
- View publishing status and run log
- Access the published TRM catalog knowledge base
- Understanding the publishing results and knowledge base output

Associate a portal with a knowledge base

Create or update a portal mapping for your published catalog, set the order for the knowledge base. And make the record active or inactive.

Before you begin
Role required: sn_apm.apm_admin and sp_admin

Procedure
1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Setup page by selecting the Setup icon  .
3. Select the expand row icon ( ) next to **Publishing Center**.
4. Select **All**.
5. Select an existing catalog to update its portal configuration.
6. On the form, fill in the fields.

   For field information, see Create a portal knowledge base form.
7. Select **Save**.

Related topics
- Edit a published TRM catalog configuration
- Publish a TRM catalog to the knowledge base
- Republish a TRM catalog after updates

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Automatic synchronization of published TRM catalogs

After you publish a TRM catalog, most updates to TRM data are synchronized automatically with the published knowledge base content.

What updates automatically

The following changes are reflected in the published knowledge base articles without requiring you to republish the catalog:

- Updates to TRM product fields that are included in the publishing configuration
- Updates to TRM product lifecycle fields that are included in the publishing configuration
- Date-driven lifecycle phase transitions, where the TRM phase changes based on configured start and end dates

Automatic synchronization ensures that published TRM catalogs remain up to date as underlying TRM data changes.

When republishing is required

You must republish the TRM catalog to apply certain structural or global changes to the published knowledge base content.

Republishing is required in the following scenarios:

- Renaming a TRM phase (for example, changing Divest to Divesting)
- Making structural changes that affect how content is rendered across all articles, such as modifying TRM category names or TRM phase definitions

When republishing is required, the Publishing Center prompts you to republish the catalog so that the changes are applied consistently across all published articles. For instructions on republishing, see Republish a TRM catalog after updates.

Related topics

Create a configuration to publish TRM data

View publishing status and run log

Access the published TRM catalog knowledge base

Understanding the publishing results and knowledge base output

Working with Technology Reference Model (TRM) in EA Workspace

Publish a TRM catalog to the knowledge base

Publish a Technology Reference Model (TRM) catalog to the ServiceNow Knowledge Base, making approved technology standards available for broader discovery and consumption.

Before you begin

Role required: sn_apm.apm_admin and knowledge_admin

About this task

https://service-now.portal.trainn.co/share/2bBv8hxFD1neFqyFsvlhWA/embed?autoplay=false

When you publish a TRM catalog, the details such as products, lifecycle phases, and standards are transformed into structured Knowledge Base articles. These articles can be searched, browsed, and consumed across the organization. This allows technology standards maintained by enterprise architects to be accessed by a much broader audience, including application owners, developers, and solution architects.

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Note: You can create only one publishing configuration for a specific combination of catalog type and access type within the same domain.

Procedure

1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Setup page by selecting the Setup icon .
3. Select the expand row icon ( ) next to **Publishing Center**.
4. Select **All**.
5. Open the catalog that you want to publish or create a configuration to publish.
   For instructions to create a configuration,see Create a configuration to publish TRM data.

   Note: If you plan to publish a public catalog for guest users, ensure that your knowledge portal is configured to allow public access. Publishing applies knowledge base access settings based on the access type selected for the catalog.

6. Select **Publish**.

Result

After publishing, you can see the following changes on the **Details** tab:

- A message appears on the banner with a link to the published knowledge base article. You can select the **View catalog** link to navigate to the knowledge base article.
- The **Status** field value is changed to **Published**.
- The **Catalog link** field displays a URL to the published catalog.

Related topics

Working with the publishing center

Create a configuration to publish TRM data

Edit a published TRM catalog configuration

Associate a portal with a knowledge base

Republish a TRM catalog after updates

Understanding the publishing results and knowledge base output

Republish a TRM catalog after updates

Republish a TRM catalog to apply the latest TRM updates to the published knowledge base content.

Before you begin

Role required: sn_apm.apm_admin and knowledge_admin

About this task

You must republish a TRM catalog to reflect the changes such as updates to the TRM category or TRM phase in the published knowledge base catalog.

Note: If you can't republish the catalog due to permissions, contact a knowledge administrator to republish and apply the changes.

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Procedure

1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Setup page by selecting the Setup icon  .
3. Select the expand row icon ( ) next to **Publishing Center**.
4. Select **All**.
5. Select the TRM catalog name to open its publishing configuration.
6. Select **Publish**.
   The system starts republishing the catalog. You can open the Run logs tab to view job history and current status.

Result
The knowledge base catalog reflects the latest TRM data and publishing configuration.

Related topics

View publishing status and run log

Access the published TRM catalog knowledge base

Edit a published TRM catalog configuration

Understanding the publishing results and knowledge base output

View publishing status and run log

View publishing run logs to monitor publishing activity and review the publishing history for a TRM catalog.

Before you begin
Role required: sn_apm.apm_admin

About this task
To see publishing history of a catalog, the catalog must have been published at least once.

Publishing run logs provide a record of all publishing and republishing jobs for a TRM catalog. Use run logs to verify whether a publish or republish operation completed successfully, monitor jobs that are currently running, and review historical publishing activity.

Note: Run logs are read#only. You can monitor job status but cannot modify any details. However, You can use the Refresh button on the run log page while status is running to get latest state.

Procedure

1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Setup page by selecting the Setup icon  .
3. Select the expand row icon ( ) next to **Publishing Center**.
4. Select **All**.
5. Select a TRM catalog to open its publishing configuration.
6. Select the **Run logs** tab.
   You can see the publishing job history for the selected catalog.
7. Select **Publish**.

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Related topics

- Publish a TRM catalog to the knowledge base
- Access the published TRM catalog knowledge base
- Understanding the publishing results and knowledge base output

Access the published TRM catalog knowledge base

Access the published TRM catalog to view approved technology standards and lifecycle information in the knowledge base.

Before you begin

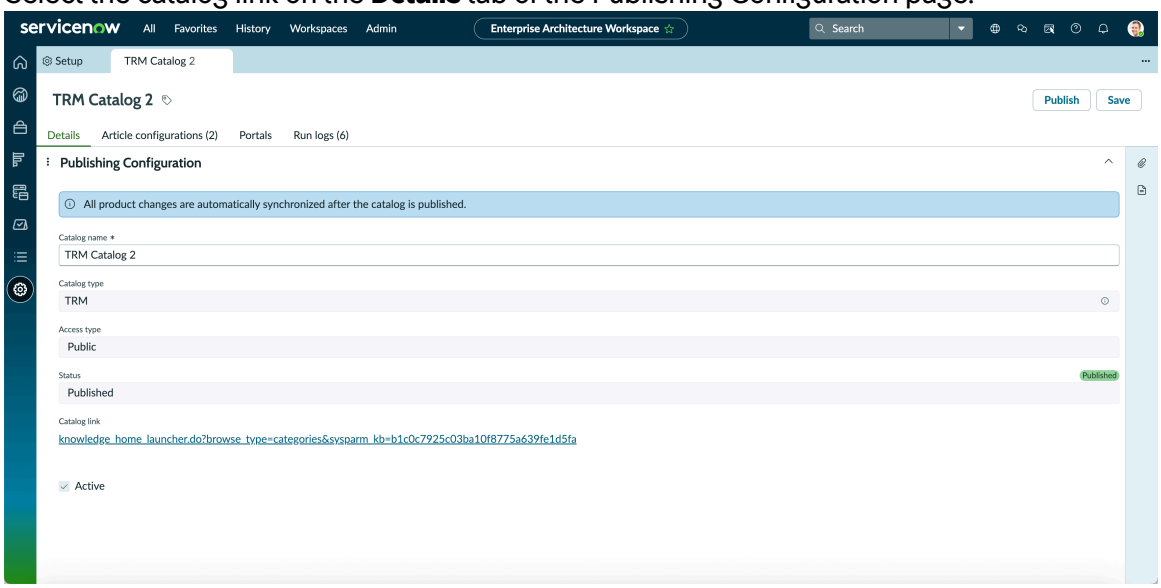
Role required: sn_apm.apm_user

About this task

When a TRM catalog is published, it becomes available as knowledge base content. You must have access to the knowledge base where the catalog is published. It depends on the catalog access type. If it is an internal catalog, it requires a sign in. If it is a public catalog, it can be accessed without signing in. The public catalogs can be exposed to anonymous users and can be linked from internet-facing sites depending on portal setup.

Procedure

1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Setup page by selecting the Setup icon .
3. Select the expand row icon ( ) next to **Publishing Center**.
4. Select **All**.
5. Open the catalog for which you want to access the knowledge base article.
6. Select the catalog link on the **Details** tab of the Publishing Configuration page.



Related topics

- Published TRM catalog experience
- Create a configuration to publish TRM data
- Publish a TRM catalog to the knowledge base
- Republish a TRM catalog after updates

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View publishing status and run log

Understanding the publishing results and knowledge base output

Understanding the publishing results and knowledge base output

Understand what happens after you publish or republish a TRM catalog and how to interpret the results in the Publishing Center and the knowledge base.

Publishing results in the Publishing Center

When you publish or republish a TRM catalog, the Publishing Center tracks the outcome of the publishing operation. For more information, see View publishing status and run log.

Knowledge base output

Publishing a TRM catalog generates knowledge base content that you can browse and search. After publishing, a catalog link is generated. For more information, see Access the published TRM catalog knowledge base.

Note: The **Authored by** and **Revised by** fields on knowledge base articles reflect the account that triggered the update:

- Articles created or updated through the **Publish** button in the Publishing Center show **System Administrator** in both fields, because publishing runs as a scheduled job.
- Articles updated automatically when a TRM product or product lifecycle record changes show the logged-in user who made the change.

How TRM content is structured in the knowledge base

Each TRM product is published as a Knowledge Base article with predefined sections. Common sections include:

- General Information- This section presents high-level product details, such as:
  - Product name
  - Product type (for example, Software or Hardware)
  - TRM phase
  - Category name
  - Company or vendor name
  - Category owner
  - Investment direction
  - Business justification
- Product Lifecycles- This section presents the lifecycle-specific information for the product, such as:
  - Model or version details
  - Lifecycle phase
  - Phase start and end dates
  - Descriptions or notes related to lifecycle phases

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Access and visibility

Access to the published TRM catalog depends on how the catalog and Knowledge Base are configured:

- Internal catalogs require users to sign in to view the Knowledge Base content.
- Public catalogs can be configured to allow guest access through a portal.

Note: The knowledge base content is always read#only. To make changes, update TRM data or publishing configuration, and publish or republish the catalog.

Related topics

Publish a TRM catalog to the knowledge base

Create a configuration to publish TRM data

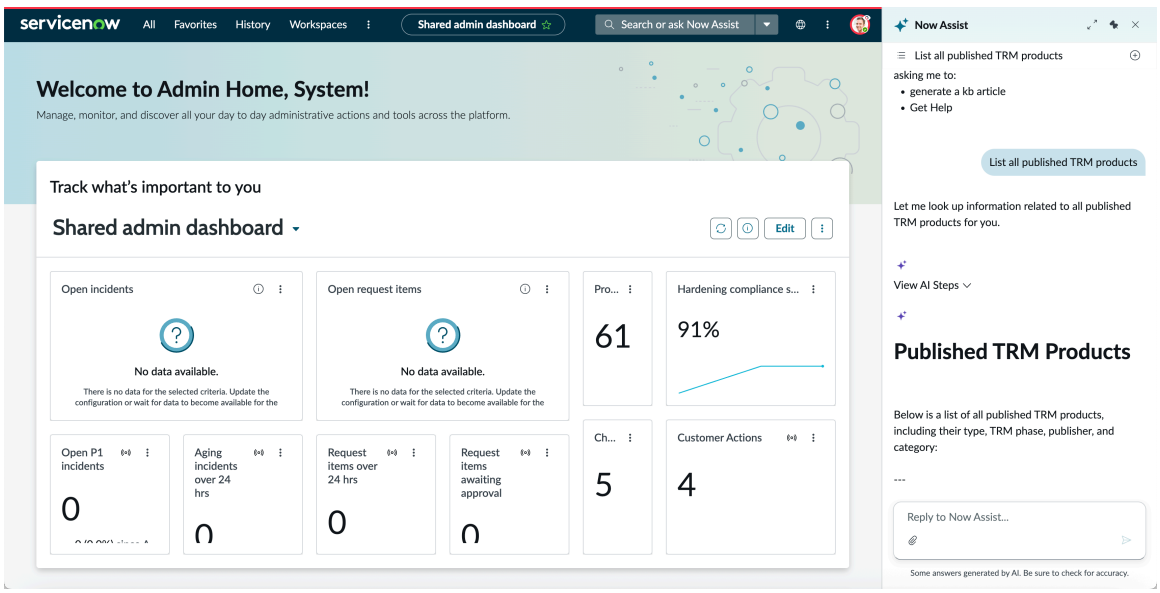
Access the published TRM catalog knowledge base

AI Search on the TRM catalog

Use the Now Assist panel to search published Technology Reference Model (TRM) catalog records using natural language queries.

Installing the May 2026 EA Workspace update with ServiceNow Otto for EA automatically registers the TRM catalog as a searchable source in AI Search. You can then use the Now Assist panel to ask natural language questions about your published TRM catalog records. The panel provides answers with citations linked to the source knowledge articles.

For example, you can ask the Now Assist panel questions such as List all published TRM products and receive a summarized response with references to the relevant catalog records.



Sample queries:

- What is the approved software for databases?
- Which technologies are pending retirement?
- What is the approval status of EC2?
- List all published TRM products in the infrastructure category.
- What is the lifecycle status of Oracle Database?

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How AI Search works with the TRM catalog

EA Workspace ships with an AI Search configuration record that registers the TRM catalog [sn_apm_ws_kb_template_trm_product] as an indexed source.

After you install the May 2026 update, the indexing behavior depends on when your TRM catalog records were published:

- Records published after the update: Automatically indexed and searchable through the Now Assist panel. No additional configuration is required.
- Records published before the update: Not automatically indexed. You must manually trigger indexing. See Index previously published TRM catalog records for AI Search.

Prerequisites

Before you can search TRM catalog records using AI Search, verify the following are configured on your instance:

- AI Search is activated. Navigate to **All** and search for **AI Search Status**. The status page must display **AI Search is ready**. For instructions, see Activate AI search
- Now Assist panel is enabled. Navigate to **Now Assist admin** > **Now Assist Experiences** > **Now Assist panel** and verify that the panel is turned on. For instructions, see Activate the ServiceNow Otto panel standard chat.
- Install the ServiceNow Otto for EA plugin. For instructions, see Configure ServiceNow Otto for Enterprise Architecture (EA).
- At least one TRM catalog is published to a knowledge base. AI Search returns results only for published records. See Publish a TRM catalog to the knowledge base.

Related topics

Index previously published TRM catalog records for AI Search

Publish a TRM catalog to the knowledge base

Access the published TRM catalog knowledge base

Index previously published TRM catalog records for AI Search

Manually trigger indexing for TRM catalog records that were published before you installed the May 2026 EA Workspace update, so that they are searchable through the Now Assist panel.

Before you begin

Role required: admin

Your instance must meet the following prerequisites:

- Activate AI Search. Navigate to **All** and search for **AI Search Status**. The status page must display **AI Search is ready**. For instructions, see Activate AI search
- Enable the Now Assist panel. Navigate to **Now Assist Admin** > **Now Assist Experiences** > **Now Assist panel** and confirm the panel is turned on. For instructions, see Activate the ServiceNow Otto panel standard chat.
- Install the Now Assist for EA plugin. For instructions, see Configure ServiceNow Otto for Enterprise Architecture (EA).
- Install the EA Workspace May 2026 update from the ServiceNow Store.

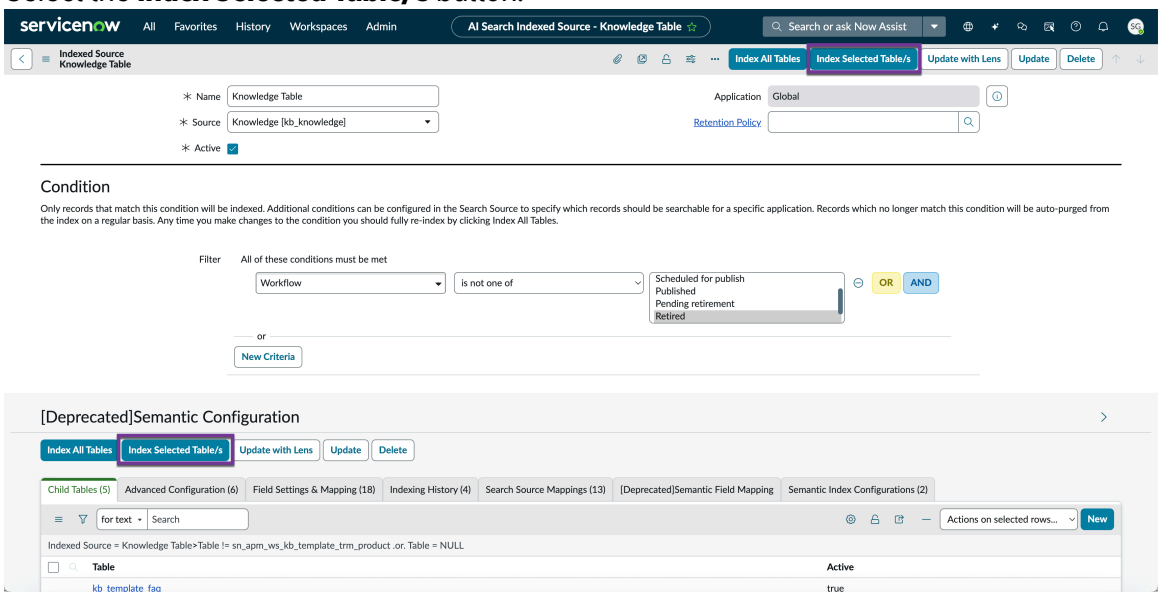
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About this task

Installing the May 2026 EA Workspace update registers the TRM catalog as an indexed source in AI Search. TRM catalog records published after this update are automatically indexed. However, records published before the update are not indexed automatically and do not appear in the Now Assist panel search results until you complete this task.

Procedure

1. Navigate to **All** > **AI Search Index** > **Indexed Sources**.
2. Select the Knowledge Table record.
3. In the **Child Tables** tab, confirm that the TRM Product [sn_apm_ws_kb_template_trm_product] table is listed and its **Active** column shows **true**.
4. Select the **Index Selected Table/s** button.



The **Generate Text Index - Single Table** dialog opens.

5. Select the **sn_apm_ws_kb_template_trm_product** option from the list, then select **Index**.

Result

Previously published TRM catalog records are indexed and searchable through the Now Assist panel.

Related topics

AI Search on the TRM catalog

Retire or archive a published TRM catalog

Use the Knowledge Base management controls to retire or archive the content generated from a published Technology Reference Model (TRM) catalog.

Before you begin

Role required: sn_apm.apm_admin and knowledge_admin

The Publishing Center controls how TRM data is published to the Knowledge Base, but it does not manage the lifecycle state of the published Knowledge Base content.

When a TRM catalog is published, it is generated as Knowledge Base articles. The lifecycle of those articles (active, retired, or archived) is managed through Knowledge Management, not through the Publishing Center.

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Retiring or archiving Knowledge Base content does not delete or disable the publishing configuration.

Procedure

1. Navigate to **All** > **Knowledge** > **Articles**.
2. Locate the Knowledge Base articles generated from the published TRM catalog.
3. Select the articles or categories that you want to retire or archive.
4. Use the standard Knowledge Base workflow actions to retire or archive the selected content, according to your organization's Knowledge Management process.
5. Save your changes.

Result

The selected Knowledge Base articles are retired or archived and are no longer visible to users.

The publishing configuration remains available in the Publishing Center for future reuse or republishing.

Related topics

- Publish a TRM catalog to the knowledge base
- View publishing status and run log
- Access the published TRM catalog knowledge base

Working with the Setup page

As an Enterprise Architect, use the Setup page to configure Enterprise Architecture Workspace features and functionality.

View all application categories

You can view the list of all application categories in the Enterprise Architecture Workspace.

Before you begin

Role required: sn_apm.apm_user

Procedure

1. Navigate to **Workspace** > *`Enterprise Architecture Workspace`*.
2. Open the Setup page by selecting the Setup icon  .
3. Select the expand row icon ( ) next to **Application Categories**.
4. Select **All**.

Related topics

- Manage application categories
- Add or edit an application category

View all application category groups

You can view the list of all application category groups in the Enterprise Architecture Workspace.

Before you begin

Role required: admin

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Procedure

1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Setup page by selecting the Setup icon  .
3. Select the expand row icon ( ) next to **Application Category Groups**.
4. Select **All**.

Related topics

Manage application category groups

Add or edit an application category group

View all application families

You can view the list of all application families in the Enterprise Architecture Workspace.

Before you begin

Role required: sn_apm.apm_user

Procedure

1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Setup page by selecting the Setup icon  .
3. Select the expand row icon ( ) next to **Application Families**.
4. Select **All**.

Related topics

Manage application families

Add or edit an application family

Working with indicators

Manage capability and application indicators, and regenerate capability and application indicator scores on-demand in Enterprise Architecture Workspace.

View all capability indicators

You can view the list of all capability indicators in the Enterprise Architecture Workspace

Before you begin

Role required: sn_apm.apm_user

Procedure

1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Setup page by selecting the Setup icon  .
3. Select the expand row icon ( ) next to **Indicators**.
4. Select **Capability Indicators**.

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Related topics

- Manage indicators
- Add or edit a capability indicator
- Activate or turn off an application or capability indicator
- Regenerate capability indicator scores on-demand in Enterprise Architecture Workspace

View all application indicators

You can view the list of all application indicators in the Enterprise Architecture Workspace.

Before you begin

Role required: sn_apm.apm_user

Procedure

1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Setup page by selecting the Setup icon .
3. Select the expand row icon ( ) next to **Indicators**.
4. Select **Application Indicators**.

Related topics

- Manage indicators
- Add or edit an application indicator
- Activate or turn off an application or capability indicator
- Regenerate application indicator scores on-demand in Enterprise Architecture Workspace

Regenerate application indicator scores on-demand in Enterprise Architecture Workspace

You can update application indicator scores on-demand to assess applications across dimensions such as cost, quality, technical risk, and business value. This provides real-time insights into application performance.

Before you begin

Role required: sn_apm.apm_admin

About this task

On-demand generation of indicator scores makes sure that the assessment reflects the most recent state of the application. This is useful when immediate feedback on application performance is required.

Procedure

1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Setup page by selecting the Setup icon .
3. Select the expand row icon ( ) next to **Indicators**.
4. Select **Application Indicators**.
5. Select the application indicator that you want to generate the indicator score for.
6. Select **Regenerate indicator score**.
   The **Regenerate application indicator scores** pop-up window appears.

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7. In the **Fiscal Period** box, enter the fiscal period that you want to generate the indicator score for.

   You can also select the lookup using list icon to view the list of available fiscal periods.

8. Select **OK**.
   This action doesn't update the existing application indicator scores but deletes them and generates new scores.

Related topics

- Manage indicators
- Add or edit an application indicator
- Activate or turn off an application or capability indicator
- Regenerate application indicator scores on-demand in Enterprise Architecture Workspace
- Regenerate capability indicator scores on-demand in Enterprise Architecture Workspace
- Application indicator score calculation in Enterprise Architecture Workspace
- Technology lifecycle risk score in Enterprise Architecture Workspace

Regenerate capability indicator scores on-demand in Enterprise Architecture Workspace

You can update capability indicator scores on-demand, to gather real-time insights into the performance of business capabilities and take immediate action, if necessary.

Before you begin

Role required: sn_apm.apm_admin

About this task

Assessing business capabilities within the indicator framework and based on the scores helps you to make strategic decisions on the business applications that support the business capability.

Procedure

1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Setup page by selecting the Setup icon .
3. Select the expand row icon ( ) next to **Indicators**.
4. Select **Capability Indicators**.
5. Select the capability indicator that you want to generate the indicator score for.
6. Select **Regenerate indicator score**.
   The **Regenerate application indicator scores** pop-up window appears.
7. In the **Fiscal Period** box, enter the fiscal period that you want to generate the indicator score for.

   You can also select the lookup using list icon to view the list of available fiscal periods.

8. Select **OK**.
   This action doesn't update the existing capability indicator scores but deletes them and generates new scores.

Related topics

- Regenerate capability indicator scores on-demand in Enterprise Architecture Workspace
- Manage indicators

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- Add or edit a capability indicator
- Activate or turn off an application or capability indicator
- Application indicator score calculation in Enterprise Architecture Workspace

View all scoring profiles

You can view the list of all scoring profiles in the Enterprise Architecture Workspace.

Before you begin

Role required: sn_apm.apm_user

Procedure

1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Setup page by selecting the Setup icon .
3. Select the expand row icon ( ) next to **Scoring Profiles**.
4. Select **All**.

Related topics

- Manage scoring profiles
- Add or edit a scoring profile
- Attach a profile indicator to a scoring profile
- Regenerate scoring profile indicator scores on-demand in Enterprise Architecture Workspace

View information data domains

View the list of all data domains configured in the Enterprise Architecture Workspace.

Before you begin

Role required: admin

Procedure

1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Setup page by selecting the Setup icon ( ).
3. Select the expand row icon ( ) next to **Information Data Domains**.
4. Select **All**.

Related topics

- Manage information data domains
- Add or edit an information data domain

View all demand-actions

View all preconfigured demand actions in the Enterprise Architecture Workspace that help you enhance the capability of the applications.

Before you begin

Role required: admin

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Procedure

1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Setup page by selecting the Setup icon ( ).
3. Select the expand row icon ( ) next to **Demand Actions**.
4. Select **All**.

Related topics

Manage demand actions

Add or edit a demand action

View all certification policies

View the list of all certification policies and manage them in the Enterprise Architecture Workspace.

Before you begin

Role required: certification_admin

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Setup page by selecting the Setup icon ( ).
3. Select the expand row icon ( ) next to **Certification Policies**.
4. Select **All**.

Related topics

Manage certification policies

Import certification schedules in to Data Manager

Publish a draft Data Manager policy

Add or edit a certification policy

Working with the document templates

Document Templates define how architectural documents are generated from diagrams and architectural artifacts in Enterprise Architecture Workspace.

Enterprise Architecture Workspace uses the ServiceNow Docs component to provide reusable, governed templates that standardize document structure and content. Only templates explicitly created for Enterprise Architecture Workspace are available when users generate documents from diagrams.

How to access templates

Document Templates are available in two places:

- Setup page- In the Setup page, the Document Templates section displays the list of templates available for creating documents. Admins can create and manage these templates.
- Template Centre- Displays the list of available templates, when you select **Create a document** from a diagram.

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Related topics

View all document templates

View all document templates

View the list of templates available to create documents in the Enterprise Architecture Workspace.

Before you begin
Role required: sn_apm.apm_user

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Setup page by selecting the Setup icon ( ).
3. Select the expand row icon ( ) next to **Templates**.
4. Select **Document Templates**.
   The list of all available templates appear.

Related topics

Export document templates

Generate a document from a diagram

View all architectural documents

Create a document template

Create a document template to define how architectural documents are generated from diagrams and architectural artifacts in Enterprise Architecture Workspace.

Before you begin
Role required: sn_apm.apm_user

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Setup page by selecting the Setup icon ( ).
3. Select the expand row icon ( ) next to **Templates**.
4. Select **Document Templates**.
5. Select **New**.
   Fill in the details. For field information, see Document template form.
6. Select **Save**.

What to do next
After creating a document template, you must define the content schema that determines what information is fetched from the diagram and related architectural records.

Related topics

View all document templates

Export document templates

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Generate a document from a diagram

View all architectural documents

Export document templates

Download document templates in the required file format.

Before you begin

Role required: sn_apm.apm_user

About this task

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Setup page by selecting the Setup icon ( ).
3. Select the expand row icon ( ) next to **Templates**.
4. Select **Document Templates**.
5. Select **Export**.
6. Select the required file format from the **File Type** drop-down list.
7. Select the option to download or email from the **Delivery Type** drop-down list.
   If you select the delivery type as email, you must enter the email address.
8. Select **Export**.
   The template data is downloaded in the selected file format.

Related topics

View all document templates

Create a document template

Generate a document from a diagram

View documents for a diagram

Manage architectural documents

Integrating Enterprise Architecture Workspace with other applications

Understand the process required to set up Enterprise Architecture Workspace to work with key applications in the ServiceNow platform to provide a deep insight into the applications.

Related topics

Exploring Enterprise Architecture Workspace

Configuring Enterprise Architecture Workspace

Managing Enterprise Architecture Workspace

Enterprise Architecture Workspace integration with Lucidchart

Create enhanced architectural diagrams for your Business Applications and Business Capabilities in Lucidchart and access them from your ServiceNow instance.

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You can model your organization's architecture in a visual way, by including the current and future state in the Lucidchart application. You can then associate these diagrams to Architectural Artifacts in Enterprise Architecture Workspace.

As an Enterprise Architect, use the integration to perform the following tasks:

- Push a Business Application hierarchy to Lucidchart.
  - Select the entities to be included in the chart.
  - Customize the shapes and colors of the entities how they appear in the chart.
  - Keep a reference of the diagram as an Architectural Artifact version.
  - View and edit the diagrams in Lucidchart.
- Push Business Capabilities maps to Lucidchart.
  - Select one or more capabilities including their child capabilities and business applications to include in the chart.
  - Keep a Lucidchart reference of the diagram as an Architectural Artifact version.

The Lucidchart integration enhances the Architectural Artifacts functionality to associate a Lucidchart diagram as a URL for an artifact. The current integration works only one way to push the diagrams from the ServiceNow instance and model them in Lucidchart.

To create a diagram in Lucidchart and associate it with an Architectural Artifact in Enterprise Architecture Workspace, you must install the following store applications from ServiceNow Store:

- Lucidchart diagramming spoke - Helps to establish a connection between ServiceNow and Lucidchart. It provides an action to create Lucidchart diagrams in Enterprise Architecture. The Lucidchart Diagramming spoke requires creating a workspace and custom app in your Lucid account to generate OAuth 2.0 tokens to authenticate ServiceNow requests. Also, you must create a connection and credential record for the Lucidchart application to authorize the create diagram action from Enterprise Architecture. For detailed information, see Lucidchart diagramming spoke, Create OAuth 2.0 Client in Lucidchart, and Create a connection and credential alias for the Lucidchart diagramming spoke.
- Lucidchart Integration – Helps to create Business Application or Business Capability diagrams in Lucidchart. You can also configure the shapes and colors of the entities to appear in Lucidchart. Install the application from ServiceNow Store

Related topics

Create a Lucidchart diagram for a business capability in the Enterprise Architecture Workspace

Create a Lucidchart diagram for a business application

Enterprise Architecture Workspace reference

Reference topics that provide additional details about Enterprise Architecture Workspace such as the field descriptions, user roles, tables, guidelines, and domain separation information.

Governing TRM product fields

The TLM Technology Lifecycle [sn_apm_tpm_technology_lifecycle] table includes fields that link a discovered technology to the TRM product and product lifecycle that govern its obsolescence status.

This functionality requires Enterprise Architecture Workspace version 10.0.0 or later and TPM plugin (sn_apm_tpm) version 1.12.0 or later.

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Governing TRM product fields

The TLM Technology Lifecycle [sn_apm_tpm_technology_lifecycle] record includes the following fields. The system populates these fields only for software; for hardware, these fields remain unpopulated.

Governing TRM product fields

Field	Description
Governing TRM Product	Reference to the TRM product that governs the obsolescence status of this discovered technology. Cleared if no matching TRM product is found.
Governing TRM Product Lifecycle	Reference to the specific TRM product lifecycle (version, or version and edition) that matches this discovered technology. Cleared if no TRM product lifecycle matches, even when a **Governing TRM Product** is populated.

Field population by reason

The scheduled job *`Populate TRM technical debts in the EA Workspace`* populates or clears these fields each time it runs, based on whether the discovered technology matches a TRM standard.

Field population by reason

Reason	Governing TRM Product	Governing TRM Product Lifecycle
Software product has no TRM product defined	Cleared	Cleared
TRM product exists but is not production approved	Populated	Cleared
TRM product is approved but no matching lifecycle version is found	Populated	Cleared
Matching lifecycle exists but is not production approved	Populated	Populated
Lifecycle matches and is production approved (no technical debt is created)	Populated	Populated

Note: On later job runs, if the discovered technology's underlying TRM product or lifecycle changes, these fields update to reflect the new match. If a previously matched TRM product is removed, both fields clear. If only the lifecycle match is lost while the TRM product match remains, only **Governing TRM Product Lifecycle** clears.

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Related topics

- View technology lifecycle details
- Technical debt calculation
- Update TRM technical debt data using scheduled job

Filter conditions

Filter and sort options define which records appear in a custom list and the order in which they are displayed.

Condition elements

You can create custom lists from the **My Lists** page to quickly access a filtered and sorted set of portfolio records.

Condition elements

Field	Description
Field	The record field to filter on, such as Business Unit, Company, or Application type.
Operator	Defines how the selected field is evaluated against the value.
Value	The value that the selected field is compared against.

Logical operators

You can combine multiple conditions using logical operators to create more precise filters.

Logical operators

Operator	Description
AND	Includes records that meet all specified conditions.
OR	Includes records that meet any of the specified conditions.

Filter operators

The following operators are available when defining filter conditions.

Filter operators

Operator	Behavior
is	Includes records that exactly match the specified value.
is not	Excludes records that match the specified value.
is not anything	Includes records where the selected field has no value.

Sort by options

Sorting controls the order in which records are displayed in a custom list. You can sort records by one or more fields.

Sort order behavior

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When multiple sort fields are defined, records are sorted using the fields in the order they appear in the **Sort by** section.

Sort order options

Order	Behavior
Ascending	Displays records from lowest to highest value, such as A to Z.
Descending	Displays records from highest to lowest value, such as Z to A.

Related topics

Create my list

Scheduled jobs installed with Enterprise Architecture Workspace

The installation of the Enterprise Architecture Workspace store application adds scheduled jobs.

Scheduled jobs for Enterprise Architecture Workspace

Scheduled job	Description
Populate Technology Lifecycle Risks	Populates the TLM technology lifecycle risks data in the TLM Technology Lifecycle Risks [sn_apm_tpm_technology_risk] table.
Populate TPM Discovered Technologies and Lifecycles	Populates the technology lifecycle data in the TPM Technology Lifecycle [sn_apm_tpm_technology_lifecycle] table. The data includes end of support date, end of extended support date, and end of life date for your software and hardware models. **Note:** Software product data appears only when you have the Software Asset Management (SAM) Foundation or Software Asset Management (SAM) Professional plugin installed.
Populate TRM technical debts in the EA Workspace	Updates the Technical Debt [sn_apm_trm_standards_technical_debt] table with the latest technical debt data for your application portfolio. Existing records persist across runs and move between Active, Resolved, and Archived states instead of being deleted and re-created. **Note:** The Populate TRM technical debts in the EA Workspace scheduled job appears only when you have the Software Asset Management (SAM) Foundation or Software Asset Management (SAM) Professional plugins installed.
Delete Archived Tech Debts	Runs automatically on the first day of every month and deletes Archived technical debt

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Scheduled jobs for Enterprise Architecture Workspace (continued)

Scheduled job	Description
	records whose **Updated** value is older than the retention period set in the system property *sn_apm_tpm.monthsToDeleteArchivedTechDebt*. The default retention period is 12 months. You can run this job manually to apply a retention period change immediately.
CSDM Product Model Assignment	Generates the Model ID for existing business applications with empty Model ID fields. An application model is a structured representation of a business application's components and their relationships and interactions within your application landscape.
Populate Number field in TPM Discovered Technologies	Populates missing Technology Lifecycle Management (TLM) lifecycle record identifiers for TPM Discovered Technology records created with TPM plugin versions earlier than 1.9.0.
Sync TRM Product Names with Software Products	Syncs the names of Technology Reference Model (TRM) products of type Software with the names of their linked Software Asset Management (SAM) software products in the TRM Products [sn_apm_trm_standards_product] table. This scheduled job is inactive by default and runs on demand.
Update Score Range in Indicator Score Table	Populates the TCO score range field on existing Indicator Score [apm_app_indicator_score] records. Run this job on upgraded instances so the **Business applications by TCO score** widget on the **Portfolio TCO** dashboard displays TCO score bands instead empty state. The job is inactive by default and must be run on demand.

Related topics

Install Enterprise Architecture Workspace

Tables installed with TLM in the EA Workspace

Several types of tables are installed with Technology Lifecycle Management.

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Important:

Technology Lifecycle Management (TLM) was previously known as Technology Portfolio Management (TPM). TPM and TLM refer to the same feature. Table names and scheduled job names continue to use TPM and haven't been renamed.

Whether your instance displays TPM or TLM also depends on your application versions. TLM labels appear only when both the Enterprise Architecture Workspace application (version 9.2.1 or later) and the Technology Lifecycle Management plugin, sn_apm_tpm (version 1.11.0 or later), are installed. If either application is on an earlier version, the interface continues to show TPM.

The following tables are installed with the Technology Lifecycle Management (TLM) plugin:

Table	Description
TPM Discovered Technology [sn_apm_tpm_discovered_technology]	Stores hardware and software elements in your enterprise. **Note:** To view the software life-cycle data, you must activate the Software Asset Management (SAM) Foundation or Software Asset Management (SAM) Professional plugin.
TPM Discovered Technology Run Log [sn_apm_tpm_discovered_technology_run_log]	Stores when Technology Portfolio Management (TPM) refreshed its contents against Software Asset Management (SAM) Professional and Hardware Asset Management (HAM) Professional.
TPM Technology Lifecycle [sn_apm_tpm_technology_lifecycle]	Stores the technology life cycles associated with the discovered technologies. **Note:** When multiple sources contribute lifecycle phase dates for the same product, the source with the highest configured rank takes precedence, and phase dates are validated to stay in chronological order.
TPM Technology Lifecycle Exception [sn_apm_tpm_technology_lifecycle_exception]	Stores the lifecycles that were approximated or couldn't be found from Software Asset Management (SAM) Professional or Hardware Asset Management (HAM) Professional.
TPM Technology Risk [sn_apm_tpm_technology_risk]	Stores the TPM technology risk information.

Related topics

Activate the Technology Lifecycle Management (TLM) plugin

Governing TRM product fields

Business rules for TLM in EA Workspace

Several types of business rules are added with Technology Lifecycle Management.

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Important:

Technology Lifecycle Management (TLM) was previously known as Technology Portfolio Management (TPM). TPM and TLM refer to the same feature. Table names and scheduled job names continue to use TPM and haven't been renamed.

Whether your instance displays TPM or TLM also depends on your application versions. TLM labels appear only when both the Enterprise Architecture Workspace application (version 9.2.1 or later) and the Technology Lifecycle Management plugin, sn_apm_tpm (version 1.11.0 or later), are installed. If either application is on an earlier version, the interface continues to show TPM.

The following business rules are added for Technology Lifecycle Management (TLM) in EA Workspace:

Business rule	Table	Description
Populate TPM Technology Lifecycle table	TPM Discovered Technology [sn_apm_tpm_discovered_technology]	Fetches the technology life-cycle data for your hardware and software elements in your enterprise.
Update Technology Lifecycle Info	TPM Discovered Technology [sn_apm_tpm_discovered_technology]	Updates technology life-cycle data for your hardware and software elements.
TPM Audit on TPM Lifecycle Exception	TPM Technology Lifecycle Exception [sn_apm_tpm_technology_lifecycle_exception]	Fetches the life cycles that were approximated or couldn't be found from Software Asset Management (SAM) Professional or Hardware Asset Management (HAM) Professional.

Related topics

Activate the Technology Lifecycle Management (TLM) plugin

Scheduled jobs for TLM in the EA Workspace

Several types of scheduled jobs are added for Technology Lifecycle Management.

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Whether your instance displays TPM or TLM also depends on your application versions. TLM labels appear only when both the Enterprise Architecture Workspace application (version 9.2.1 or later) and the Technology Lifecycle Management plugin, sn_apm_tpm (version 1.11.0 or later), are installed. If either application is on an earlier version, the interface continues to show TPM.

The following is the list of scheduled jobs for Technology Lifecycle Management (TLM) in EA Workspace:

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Scheduled job	Description
Populate TPM Technology Lifecycle Risks	Populates the TPM technology life-cycle risks data in the TPM Technology Life-cycle Risks [sn_apm_tpm_technology_risk] table.
Populate TPM Discovered Technologies and Lifecycles	Populates the technology life-cycle data in the TPM Technology Lifecycle [sn_apm_tpm_technology_lifecycle] table. The data includes end of support date, end of extended support date, and end of life date for your software products and hardware models. **Note:** The data for software products is displayed only when the Software Asset Management (SAM) Foundation or Software Asset Management (SAM) Professional plugin is installed.
Populate TRM technical debts in the EA Workspace	Updates the Technical Debt [sn_apm_trm_standards_technical_debt] table with the latest technical debt data for your software products that is available in the TPM Discovered Technology [sn_apm_tpm_discovered_technology] table. Existing records persist across runs and move between Active, Resolved, and Archived states instead of being deleted and re-created. **Note:** The *Populate TRM technical debts in the EA Workspace* scheduled job will be available only the Software Asset Management (SAM) Foundation or Software Asset Management (SAM) Professional plugin is installed.
Delete Archived Tech Debts	Runs automatically on the first day of every month and deletes Archived technical debt records whose **Updated** value is older than the retention period set in the system property *sn_apm_tpm.monthsToDeleteArchivedTechDebt*. The default retention period is 12 months. You don't need to run this job manually, though you can if you want to apply a retention period change immediately.

Related topics

- Update TRM technical debt data using scheduled job
- Update TPM data for a business application or application service
- Restart the TPM Discovered Technologies and Lifecycles job
- Activate the Technology Lifecycle Management (TLM) plugin

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Application indicator score calculation in Enterprise Architecture Workspace

Enterprise Architecture Workspace calculates a composite score for each business application and business capability by running data from configured indicators through a multi-step pipeline. The pipeline normalizes raw values, applies weighted contributions, and aggregates the results into a final score per fiscal period.

Scoring pipeline overview

An indicator is a single metric or measure of a particular aspect of a business application or business capability. Indicators can be subjective, such as assessment responses. They can also be objective, such as operational or risk data from the CSDM service graph — for example, the number of incidents linked to an application.

By running indicators through a consistent scoring pipeline, Enterprise Architecture Workspace confirms that applications assessed on different data types can be compared meaningfully on a single score. Data types include assessment responses, change counts, and custom script outputs. Scores are stored per application per fiscal period, so historical data is preserved across scoring runs.

Administrators control which indicators contribute to a profile, how they are weighted, and whether fixed or dynamic value ranges are used during normalization.

Key tables

Key tables for indicator score calculation

Table	Label	Role
apm_application_profile	Scoring Profile	Groups indicators together. One profile is assigned to each business application.
apm_application_profile_indicator	Profile Indicator	Maps an indicator to a profile and stores the weight value for that profile.
apm_metric	Indicator	Defines the data source, direction, and normalization settings for each indicator.
apm_app_indicator_score	Indicator Score	Stores the per-indicator, per-application, per-fiscal-period score after the pipeline runs.
apm_app_score	Application Score	Stores the final aggregated score per application per fiscal period.

Raw weight collection by indicator type

Each indicator has a data source that determines how the raw weight is collected for each business application.

Indicator type	Data source value	How the raw weight is collected
Performance Analytics	pa	Pulls a value from the configured Platform Analytics indicator for the fiscal period. The breakdown must target the same CI class as the profile (for example, Business Application).
Custom script	script	Executes the script defined on the indicator. The script must return a JSON object that

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Indicator type	Data source value	How the raw weight is collected
		contains the application sys_id and the corresponding weight.
Query condition	condition	Runs a GlideAggregate query on the configured table and filter, then aggregates results using the selected method: SUM, COUNT, AVERAGE, MIN, or MAX.
Assessment	assessment	Aggregates assessment metric results for the fiscal period across all assessment groups that are associated with the application.
Composite (parent indicator)	indicators	Sums the normalized values of all child indicators for each application. Only the parent indicator's weightage is counted in the profile score.

Normalization

After the raw weight is collected for each application, the system normalizes the value to a 1–10 scale. This normalization allows indicators using different units and ranges to be combined meaningfully. Regardless of direction, a normalized value of 10 always represents the best-performing application for that indicator, and 1 represents the worst. The Direction setting controls how the raw value maps to this scale.

Condition	Formula
All applications have the same raw weight (max equals min)	`normalizedValue = 10`
Direction = Maximize (the application with the highest raw value scores 10; the application with the lowest raw value scores 1; for example, Business Valu)	`normalizedValue = (((appWeight – minWeight) / (maxWeight – minWeight)) × 9) + 1`
Direction = Minimize (the application with the lowest raw value scores 10; the application with the highest raw value scores 1; for example, Incident Count)	`normalizedValue = 10 – (((appWeight – minWeight) / (maxWeight – minWeight)) × 9)`

In the formulas:

- `appWeight` is the raw value for this application.
- `minWeight` and `maxWeight` are the lowest and highest raw values across all applications for this indicator in the fiscal period. If **Consider absolute values** is selected on the indicator, the system uses the **Target minimum** and **Target maximum** values from the indicator record instead.

Note: Assessment-type indicators don't support **Target maximum** and **Target minimum** fields. The system uses 1 as the minimum and 10 as the maximum automatically for assessments.

If a **Normalization script** is defined on the indicator record, it overrides the standard formulas preceding.

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Indicator score

The indicator score represents the contribution of one indicator to the overall application score, proportional to its weightage in the profile.

```
indicatorScore =
  normalizedValue × indicatorWeightage / totalProfileWeightage
```

`totalProfileWeightage` is the sum of weightage values across all indicators in the same scoring profile. All values are rounded to two decimal places.

Assessment-based indicator example

This example shows how an indicator score is calculated for a single business application using an assessment-based indicator in one fiscal period.

Setup: A scoring profile has three indicators, each with a weightage of 33 (total profile weightage = 99). One indicator is a Business Fit assessment indicator. Two assessment groups fall within the fiscal period for this application.

Calculation step	Value	How it is calculated
Assessment group 1 — average rating	4.7	SUM of metric results for the application ÷ number of results in the assessment group.
Assessment group 1 — application weight	9.46	(scaleFactor × rating) + 1, where scaleFactor = 9 ÷ 5 = 1.80. Result: (1.80 × 4.7) + 1.
Assessment group 2 — average rating	4.5	Calculated the same way as assessment group 1.
Assessment group 2 — application weight	9.10	(1.80 × 4.5) + 1.
Normalized value	9.28	Total application weight ÷ number of assessment groups: (9.46 + 9.10) ÷ 2.
Indicator weightage	33	Configured on the profile indicator record.
Total profile weightage	99	33 + 33 + 33 (sum of all indicator weightages in the profile).
Indicator score	3.09	9.28 × 33 / 99, rounded to two decimal places.

The overall application score is the sum of all indicator scores where **Use in app score calc** is selected. If all three indicators in this profile each returned a score of 3.09, the application score would be 9.27.

Business capability score calculation

Business capability scoring uses the same indicator and profile infrastructure as application scoring. The key difference is that scores are calculated directly only for leaf capabilities (capabilities with no children), and parent scores are derived by roll-up.

Aspect	Behavior
Which capabilities are scored directly	Leaf capabilities only (leaf_node = true). The indicator pipeline runs against leaf nodes the same way it runs against business applications.

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Aspect	Behavior
Parent score roll-up	Each parent capability score is the arithmetic mean of its direct children's scores. Capabilities with a score of –1 (not assessed) are excluded from the mean.
Indicator-level roll-up	Individual indicator scores — such as People, Process, and Technology — are also averaged across children at each level of the hierarchy.
Score storage	Stored in the Application Score [apm_app_score] table, the same table as application scores. The profile uses `ci_class = cmdb_ci_business_capability`.

Capability heat map color thresholds

The capability heat map translates numeric scores into color-coded gap ratings. The default thresholds are as follows.

Score range	Color	Interpretation
7 to 10	Green	No gap
4 to less than 7	Orange	Medium gap
0 to less than 4	Red	Major gap
–1 or empty	Gray	Not assessed

Note: The **No gap threshold** and **Mid gap threshold** values are configurable per widget in the Capability map widget instance [apm_capability_map_instance] table.

Related topics

- Manage indicators
- Manage scoring profiles
- Tech debt indicator score for application rationalization
- Regenerate application indicator scores on-demand in Enterprise Architecture Workspace
- Regenerate capability indicator scores on-demand in Enterprise Architecture Workspace
- Rationalization of business applications

Technology lifecycle risk score in Enterprise Architecture Workspace

The Technology Lifecycle Management (TPM) lifecycle risk score is a numeric value that quantifies how close a technology is to its end-of-support or end-of-life milestone. Risk scores roll up from individual technologies through application services to business applications, and serve as an indicator in scoring profiles to surface lifecycle exposure across the portfolio.

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Technology lifecycle risk scores

Important:

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Whether your instance displays TPM or TLM also depends on your application versions. TLM labels appear only when both the Enterprise Architecture Workspace application (version 9.2.1 or later) and the Technology Lifecycle Management plugin, sn_apm_tpm (version 1.11.0 or later), are installed. If either application is on an earlier version, the interface continues to show TPM.

Technologies without lifecycle data, or that have passed all lifecycle milestones, receive the maximum risk score of 100. Technologies more than 18 months from their next milestone receive a risk score of 0. Between those extremes, the score scales by proximity to the next milestone and by which milestone type is approaching. End of life is weighted more heavily than end of support.

Two scheduled jobs must complete before lifecycle risk scores are available in Enterprise Architecture Workspace: one to discover technologies and link them to lifecycle records, and one to calculate the risk scores from those records.

Key tables for technology lifecycle risk scores

Table	Label	Description
sn_apm_tpm_discovered_technology	TLM Discovered Technologies	Links each discovered technology to a business application, application service, server CI, and lifecycle record. Populated by the data collection scheduled job.
sn_apm_tpm_technology_lifecycle	TLM Technology Lifecycle	Holds the lifecycle milestone dates for each software product or hardware model: end-of-support date, end-of-extended-support date, and end-of-life date.
sn_apm_tpm_technology_risk	TLM Technology Risk	Stores the calculated risk score per technology, per application service, and per business application. Distinguished by the Table name [table_name] field.

Lifecycle milestone fields

The risk calculation uses the following date fields from the TLM Technology Lifecycle [sn_apm_tpm_technology_lifecycle] table.

Field	Meaning
End of Support [eos_date]	The date after which the vendor no longer provides standard support for the technology.
End of Extended Support [eoes_date]	The date after which extended or paid support ends. Weighted more heavily than end of support in the risk formula.

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Field	Meaning
End of Life [eol_date]	The date after which the technology is fully retired. Carries the highest weight in the risk formula.
Earliest Lifecycle date [earliest_lifecycle_date]	The soonest upcoming milestone date across the three fields before. This is the value the risk formula uses to determine proximity.

Data collection

The **Populate TPM Discovered Technologies and Lifecycles** scheduled job traverses CMDB and Service Mapping relationships to create records in the TPM Discovered Technologies [sn_apm_tpm_discovered_technology] table. Each record links a discovered technology to:

- A business application (cmdb_ci_business_app)
- An application service (cmdb_ci_service)
- A server or host CI (cmdb_ci)
- A technology lifecycle record (sn_apm_tpm_technology_lifecycle)

Without this job, no lifecycle dates are available for risk calculation. For instructions on running the job, see Run a scheduled job to generate TPM lifecycle data.

Risk score calculation

The *Populate Technology Lifecycle Risks* scheduled job calculates a risk score for each discovered technology using a two-factor formula.

```
riskScore = baseScore × multiplier
```

Factor 1 — Multiplier (which milestone is next?)

The multiplier reflects the severity of the approaching milestone.

Next milestone	Multiplier
End of Support (EOS)	2
End of Extended Support (EOES)	3
End of Life (EOL)	4
All milestones already passed, or no lifecycle data available	Score is set to 100 immediately — the formula is not applied.

Factor 2 — Base score (how far away is the next milestone?)

The base score reflects how much time remains before the next milestone.

Days until next milestone	Base score
0–30 days	20
31–90 days	10
91–180 days	6
181–360 days	4

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Days until next milestone	Base score
361–540 days	2
More than 540 days (18+ months)	0

The maximum possible score from the formula is 80 (base score 20 × multiplier 4, when a technology is within 30 days of its end-of-life date). The absolute maximum of 100 applies only when all lifecycle dates have passed or no lifecycle data exists.

Scores are stored per fiscal period in the TLM Technology Risk [sn_apm_tpm_technology_risk] table.

Note: *Populate Technology Lifecycle Risks* scheduled job runs monthly by default. You can also run it on demand. For instructions, see Update TRM technical debt data using scheduled job.

Technology lifecycle risk score example

This example shows how the risk score is calculated for a single technology.

Input	Value	Explanation
Days until next milestone	60 days	The Earliest lifecycle date [earliest_lifecycle_date] is 60 days from today.
Next milestone type	End of Life (EOL)	The approaching date is the End of life date [eol_date].
Base score	10	60 days falls in the 31–90 day range.
Multiplier	4	EOL carries the highest multiplier.
Risk score	40	10 × 4 = 40. Stored in the TLM Technology Risk table [sn_apm_tpm_technology_risk.risk_score].

Risk score aggregation

After individual technology risk scores are calculated, the scores aggregate up the hierarchy by summation. All three levels are stored in the TLM Technology Risk [sn_apm_tpm_technology_risk] table, distinguished by the table name [table_name] field.

Level	Table name [table_name] value	How the score is computed
Technology	TLM Discovered Technologies [sn_apm_tpm_discovered_technology] table	Individual risk score from the two-factor formula mentioned earlier.
Application Service	Application Service [cmdb_ci_service] table	Sum of all technology risk scores associated with that application service.
Business Application	Business Application [cmdb_ci_business_app] table	Sum of all technology risk scores across all application services linked to the business application.

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The business application–level risk score is the value that the Lifecycle Risk indicator uses when contributing to an application's overall score in a scoring profile.

Where lifecycle risk scores appear in Enterprise Architecture Workspace

Location	How it is used
Application Indicators (Setup page)	The Lifecycle Risk indicator appears in the Application Indicators list. You can add it to a scoring profile to include the risk score in application score calculation. You can also regenerate scores on demand from this page.
Application Rationalization — Bubble Chart	The Lifecycle Risk indicator score can be selected as an axis or bubble size value to visualize risk distribution across the portfolio.
Application Rationalization — List view	The Lifecycle Risk score is available as a sortable column, enabling you to rank applications from highest to lowest lifecycle exposure.
Application 360 Dashboard	The lifecycle risk score for the selected application appears alongside other indicator scores. **Note:** The Application 360 dashboard requires the Load Application Indicators and compute Application Scores scheduled job to have run for the current fiscal period. If the job has not run, lifecycle risk scores don't appear.

Related topics

- Tech debt indicator score for application rationalization
- Application indicator score calculation in Enterprise Architecture Workspace
- Regenerate application indicator scores on-demand in Enterprise Architecture Workspace
- Run a scheduled job to generate TPM lifecycle data
- Manage scoring profiles
- Rationalization of business applications

Tech debt indicator score for application rationalization

The Technology Reference Model (TRM) Technical Debt indicator is a customizable application metric that evaluates the technical debt score for each Business Application. This score reflects the number of associated technologies that don’t comply with established TRM standards. It offers a clear and measurable value that can be leveraged across the Enterprise Architecture workspace for scoring, analysis, and visualization.

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Whether your instance displays TPM or TLM also depends on your application versions. TLM labels appear only when both the Enterprise Architecture Workspace application (version 9.2.1 or later) and the Technology Lifecycle Management plugin, sn_apm_tpm (version 1.11.0 or later), are installed. If either application is on an earlier version, the interface continues to show TPM.

By highlighting technology non-compliance, the TRM Technical Debt score helps identify high-risk applications enabling teams to prioritize modernization and rationalization initiatives effectively.

TRM Technical Debt Indicator Score Logic

The application weight is the number of technical debts for that business application. If a business application has high technical debts, then its normalized value is considered as low. If a business application has low technical debts, then its normalized value is considered as high.

Following is the logic to generate the TRM technical debt indicator score:

- Compliant Applications

  If a Business Application (BA) is listed in the TPM Discovered Technologies (sn_apm_tpm_discovered_technology) but not in the TRM Technical Debts (sn_apm_trm_standards_technical_debt), then the application is considered as compliant.

  - Tech debt score: 0
  - Normalized value: 10

- Unassessed Applications (Not Discovered)

  If a business application isn't found in the TPM Discovered Technologies table:

  - The application isn't assessed
  - No score is assigned

- Non-compliant applications

  If a business application is found in both the TPM Discovered Technologies and TRM Technical Debts:

  - The application is considered non-compliant
  - Tech Debt score: Based on the number of non-compliant technologies (range: 1–10)
  - Normalized value: From 1 through 10

- Hardware-Only Applications

  If a business application is found in the TPM Discovered Technologies but only has hardware associated and isn't listed in the TRM Technical Debts table:

  - The application isn't assessed
  - No score is assigned

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Run scheduled jobs

You must run the following scheduled jobs to populate the TPM and TRM data in EA Workspace:

- Populate TPM Discovered Technologies and Lifecycles

  This job populates the technology life-cycle data in the TPM Technology Lifecycle [sn_apm_tpm_technology_lifecycle] table.

  Note: The data includes end of support date, end of extended support date, and end of life date for your software products and hardware models.

  For instructions, see Run a scheduled job to generate TPM lifecycle data. For updating the TPM data for a selected business application, see Update TPM data for a business application or application service.

- Populate TRM technical debts in the EA Workspace

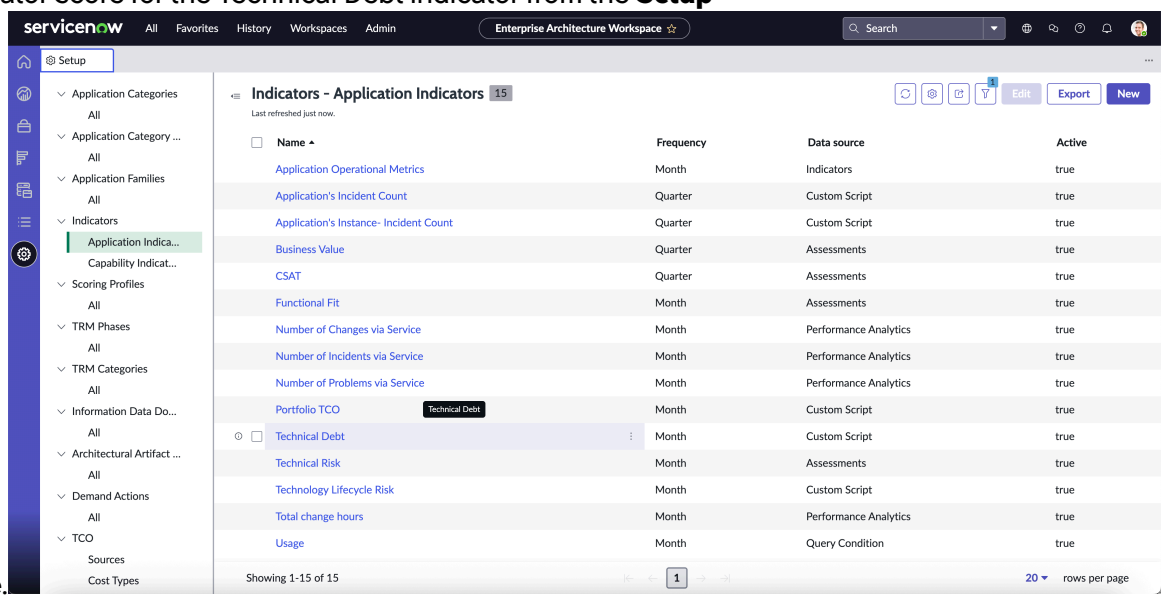
  This job updates the Technical Debt [sn_apm_trm_standards_technical_debt] table with the latest technical debt data for your software products that is available in the TPM Discovered Technology [sn_apm_tpm_discovered_technology] table.

  Note: The Populate TRM technical debts in the EA Workspace scheduled job are available only the Software Asset Management (SAM) Foundation or Software Asset Management (SAM) Professional plugin is installed.

  For instructions, see Update TRM technical debt data using scheduled job.

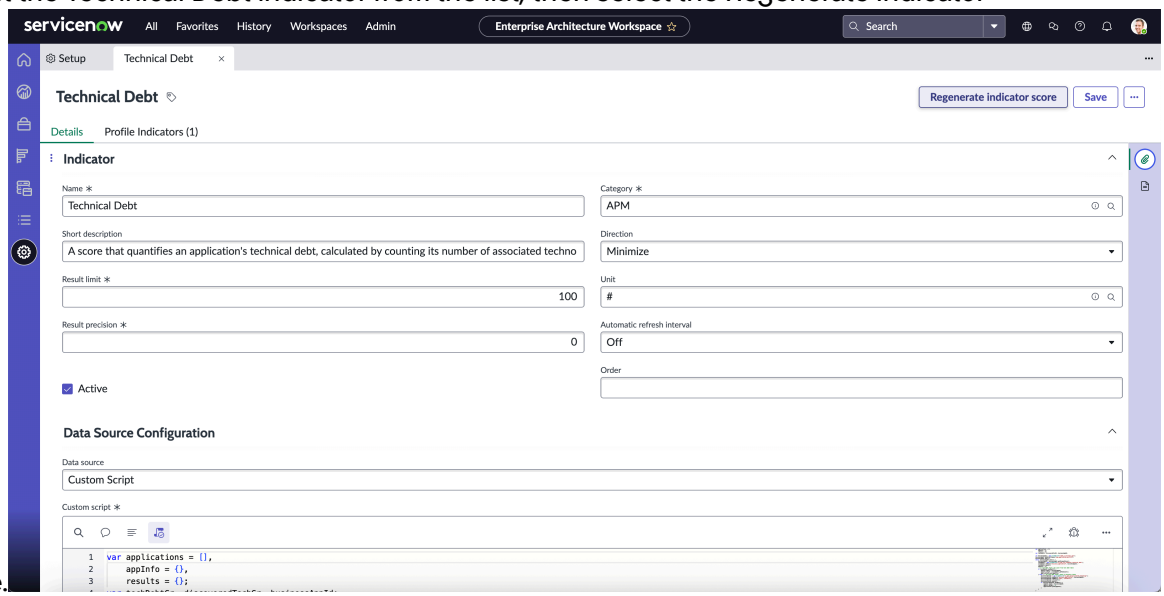
Regenerate indicator score

Update application indicator scores on-demand, to assess the application for a technical risk, and gather real-time insights, regenerate indicator score for the Technical Debt indicator from the **Setup** page.



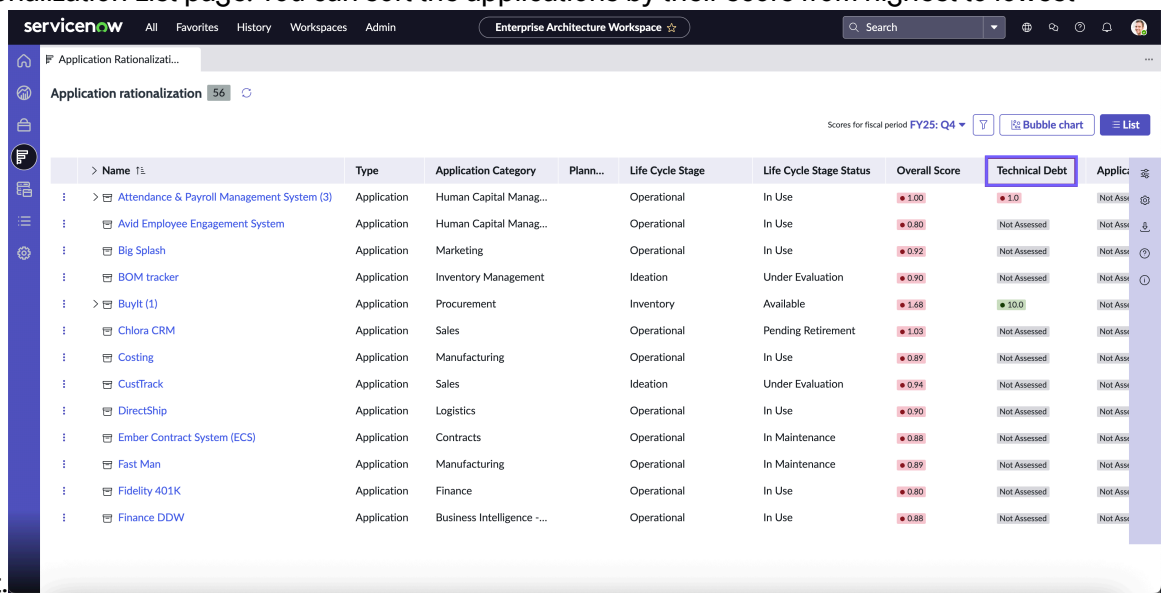
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Select the Technical Debt indicator from the list, then select the Regenerate indicator score.



Technical Debt indicator score on the Application Rationalization List view page

The Technical Debt indicator score is available as a column on the Application Rationalization List page. You can sort the applications by their score from highest to lowest debt.

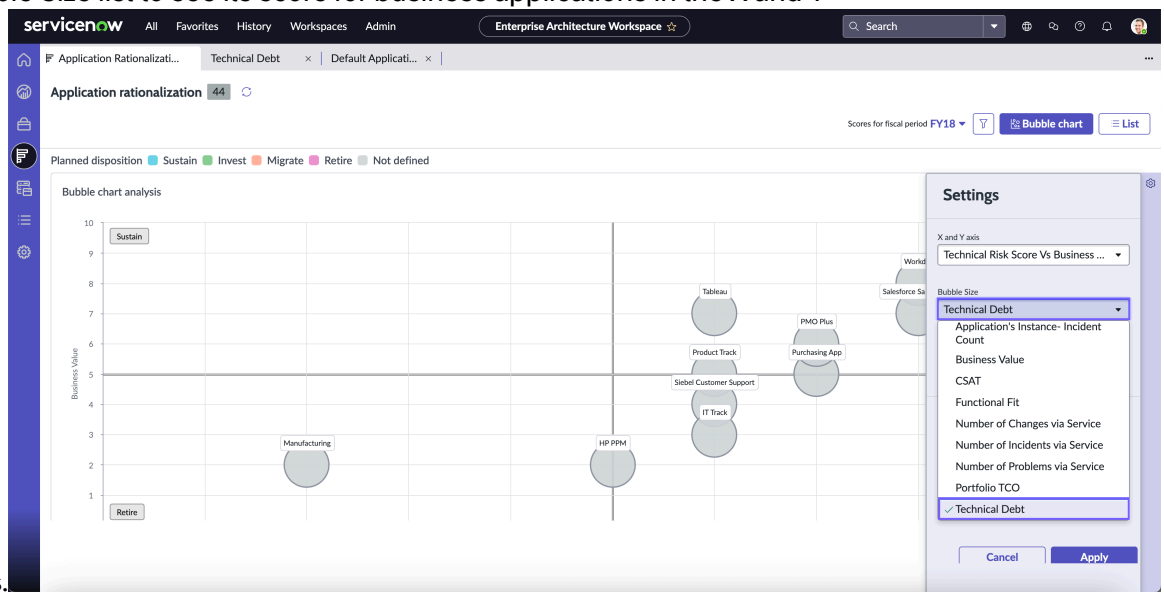


Technical Debt indicator as bubble size on the Application Rationalization Bubble Chart page

The Technical Debt indicator is listed in the Bubble Size list under the Settings of the Bubble Chart page. You can select the indicator from the

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Bubble Size list to see its score for business applications in the X and Y axes.



Related topics

- Rationalization of business applications
- Application indicator score calculation in Enterprise Architecture Workspace
- Technology lifecycle risk score in Enterprise Architecture Workspace

TRM technical debt states and transitions

A TRM technical debt record persists across scheduled job runs and moves between Active, Resolved, and Archived states instead of being deleted and re-created.

This functionality requires Enterprise Architecture Workspace version 10.0.0 or later and TPM plugin (sn_apm_tpm) version 1.12.0 or later.

Technical debt states

Each TRM technical debt record has a **State** field that shows one of the following states.

Technical debt states

State	Description
Active	Technical debt that is active and needs attention. This is the default state when a technical debt record is first created.
Resolved	Active technical debt that no longer applies because the underlying discovered technology is still in use but no longer violates a TRM standard.
Archived	Technical debt for which the underlying discovered technology no longer exists in the TPM Discovered Technology [sn_apm_tpm_discovered_technology] table (typically because the server association was removed). Alternatively, the reason associated with the active debt is turned off in the technical debt configuration.

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State transitions

The *Populate TRM technical debts in the EA Workspace* scheduled job evaluates every technical debt record on each run and moves it to a new state based on the following rules. The record is never deleted; only its state, reason, and **Updated** timestamp change.

Technical debt state transitions

From state	To state	Trigger
Active	**Resolved**	The debt is resolved: the discovered technology still exists, but it no longer violates a TRM standard.
Active	**Archived**	The underlying discovered technology is removed, or the reason associated with the active debt is turned off in the technical debt configuration.
Archived	**Active**	The discovered technology is created again, or the reason associated with the archived debt is re-enabled in the technical debt configuration.
Resolved	No transition	A resolved technical debt record never moves to **Active** or **Archived**. If the same debt condition occurs again, the system creates a new technical debt record in the **Active** state instead of reopening the resolved one.

Note:

A **Resolved** record is terminal. The **Created** timestamp on a new record reflects when that new record was created, not the original detection date of the resolved record it replaced.

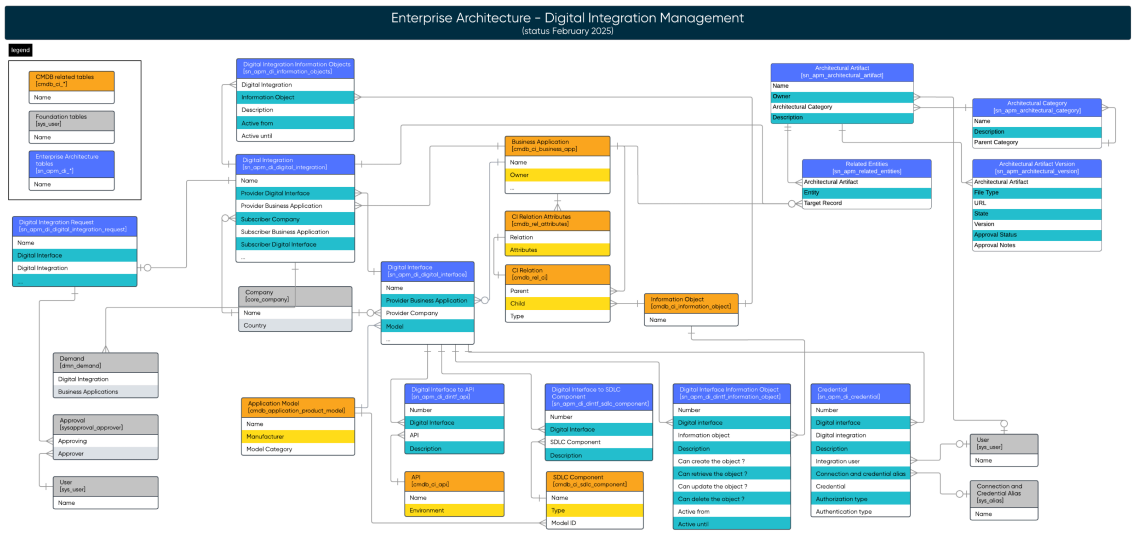
Related topics

- TRM technical debt
- Technical debt calculation
- TRM technical debt form
- Update TRM technical debt data using scheduled job
- Technology Reference Model in Enterprise Architecture Workspace

Digital integration management data model

This section shows the digital integration management data model.

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Related topics

Exploring digital integrations in Enterprise Architecture Workspace

Form field information for Enterprise Architecture Workspace

Field information for forms used in the Enterprise Architecture Workspace application.

Add relationship form

Relate a business application to an information object using the CI relationship [cmdb_rel_ci] table of type Uses::Used by. Use this suggested relationship to get the logical data of the information object to leverage a business application.

Add relationship form fields

Field	Description
Business Application	Name of the business application that auto-populates in the field.
Relationship	Type of suggested CMDB CI relationship between the business application and the information object. The field is auto-populated with Uses::Used by relationship.
Select Information Object	Table with the logical data that the business application uses.
Create, Read, Update, and Delete	Options for capturing the type of operation or a combination of operations that the business application can do on the information object. Selecting the Create, Read, Update, and Delete (CRUD) check boxes adds qualifiers. Qualifiers are properties that define the extent of the relationship between the business application CI and the information object CI.

Related topics

Manage information objects in EA Workspace

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Application model life-cycle details form

The application model life cycle helps you to better manage the life cycle of a business application.

Application model life-cycle details form

Field	Description
Model	Model ID of the business application. This field is auto-populated from the **Model ID** field value of the Business application form.
Lifecycle type	Type of the life cycle. The available options are: • **Internal** • **Publisher**
Lifecycle phase	The phase of the life cycle. The available options are: • **General Availability** • **End of Sale** • **End of Support** • **End of Extended Support** • **End of Life**
Source	Source of the life cycle. This field is auto-generated from the Business application form.
Description	Short description of the application life cycle.
Phase start date	Start date of the business application life-cycle phase.
Phase end date	End date for the business application life-cycle phase.
Risk	Risk associated with the application life cycle. The available options are: • **Very High** • **High** • **Moderate** • **Low** • **None**
Active	Option to activate the life cycle.

Related topics

Add business application lifecycle data using bubble chart

Add business application lifecycle data using the list view

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Application service form

An application service is a configuration item (CI) that represents the operational view of a deployed application or your technology landscape. It logically models all technical components such as servers, databases, middleware, and configurations, that work together to deliver a specific business capability. Application services are linked to business applications in the CMDB.

Application service form fields

Key Attributes section form fields

Field	Description
Name	Name of the application service.
Location	Set the location for the application service.
Short Description	Unique description of the application service.
Created	This is field is non-editable field.
Created by	This is field is non-editable field.
Updated	This is field is non-editable field.
Updated by	This is field is non-editable field.
Support group	Name of the user group who supports the application service.
Supported by	Name of the user who supports the application service.
Managed by	Name of the user who manages the application service.
Managed by group	Name of the user group who manages the application service.
Environment	Name of the environment such as Development, Production or Test.
Company	Name of the company.
Manufacturer	Name of the manufacturer.
Model ID	Model ID associated with the service.
Model number	Number of the Model.
Category	This field is auto-populaged as Business Service.
Sub-category	This field is auto-populaged as Service.
Department	Name of the department.

Discovery Attributes section form fields

Field	Description
Discovery source	Discovery source of the application service.
First discovered	Select the first discovered date.
Most recent discovery	Select the most recent discovery date.
Correlation ID	Enter the co-relation ID.
Skip sync	Option to select to skip the sync. This is a read-only field.

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Operational Attributes section form fields

Field	Description
Life Cycle Stage	Select the life cycle stage of the application service.
Life Cycle Stage Status	Select the status of the lifecycle stage.
Attested by	Name of the user who attested.
Attested Date	Date when the attestation is done.
Attestation Status	Select the attestation status as Attested or Rejected.
Install Status	Reason for the planned disposition decision.
Operational status	Select the operational state of the application service.
Fault count	Number of the fault count.
Maintenance schedule	Name of the maintenance schedule.
Schedule	Select the schedule for maintenance.
Requires verification	Option to select to request verification. This is a read-only field.

More Attributes section form fields

Field	Description
Fully qualified domain name	Fully qualified domain name of the application service.
IP Address	Enter IP the address.
MAC Address	Enter the MAC address.
Serial number	Enter the serial number.
DNS Domain	Enter DNS domain.
Attributes	Enter attributes names.
Comments	Add comments.
Monitor	Option to select monitor.
Can Print	Option to print the details.

Related topics

Add or edit an application service in the Enterprise Architecture Workspace

Architectural artifact form

Architectural artifacts describe a system, solution, or state of an enterprise. The architectural artifacts in Enterprise Architecture enable enterprise architects to create and manage the artifacts used in their organization.

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Architectural artifact form fields

Field	Description
Name	Name of the architectural artifact.
Architectural category	The category of the newly created architectural artifact. Select the relevant category from the field.
Format	The type of architectural artifact you want to create. You can select one of the following options: • **Attachment** • **URL**
Attachments	This field is displayed when the File Type is selected as **Attachment**. Select **Add file** to upload an attachment.
URL	This field is displayed when the File Type is selected as **URL**. Enter the URL associated with the architectural artifact.

Related topics

Associate an architectural artifact with a business app

Create or edit an architectural artifact from Portfolio page

Architectural category form

Architectural category enables Enterprise architects to categorize and manage artifacts efficiently.

Architectural category form fields

Field	Description
Name	Name of the category.
Description	Description of the category.
Parent Category	Hierarchical category. Select the parent category from the Architectural Categories page.

Related topics

Add or edit an architectural artifact category

Business actor form

The Business Actor form contains fields that define individuals or teams who perform work in your organization.

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Business Actor form

Field	Description
Name	Name of the business actor, such as Underwriting Team or an individual's name.
Description	Role and responsibilities of the business actor.
Department	Department to which the business actor belongs.
Group	Organizational group that the business actor is part of.
Location	Physical or logical location of the business actor.

Related topics

Manage business actors

Add or edit a business actor

Business application form

Using the business application form, you can add any business application to assess and track its costs, usage, business value, functional fitment, and risks.

Business application form

Field	Description
Name	Name of the business application.
Number	A unique, auto-generated identification number with a configurable prefix for the business application record.
Business process	Business process that the application is used for.
Application type	Type of application. This field indicates whether the application is custom or commercial. • **Homegrown**: The application is built in-house. • **End-user computing (EUC)**: The application is used by end users to perform their daily tasks. • **Commercial off-the-shelf (COTS)**: The application is a commercial application purchased from another company. • **SaaS**: The application is a cloud application managed by a third-party vendor.
Publisher	Name of the application publisher.
Architecture type	Type of application architecture.

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Business application form (continued)

Field	Description
	• **Client Server**: Application structure that divides tasks between the service providers and service requesters. • **N-Tier**: A multi-layered architecture where presentation, processing, and data management exist as physically separate layers. • **Web-based**: Applications that are accessed over a network connection. • **Other**: Any other type of architecture. • **Platform Host**: Hardware or software that hosts the business application. • **Platform Application**: Application that runs on a platform and can be associated to a host. In this case, the business application relies on the platform for standard operations such as development tools, execution services, and data services.
Platform host	A hardware or software that hosts the business application. This field is required if you select the **Platform Application** value in the **Architecture type** field.
Install type	Type of install. Use the following options: • **On-Premises** • **Cloud** • **Hybrid** • **Third Party Hosted**
Platform	Applications hosted by platform.
Business unit	Business unit that is associated with the selected business application.
Department	Department that is associated with the selected business application.
Installed	Date and time when the application was installed.
Status	Operational status of the application. Use the following options:

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Business application form (continued)

Field	Description
	• **Implementing** • **In Production** • **Pilot** • **Under Evaluation** Auditing is enabled for this field. Thus, whenever you update the value in this field, the **Activities** field on the **Activities** tab displays the update.
Life cycle stage	Life-cycle stage of the application. This field is auto-populated based on the value selected in the **Status** field. The data is fetched from the life-cycle mapping [life_cycle_mapping] table.
Life cycle stage status	Status of the life-cycle stage of the application. This field is auto-populated based on the value selected in the **Status** field. The data is fetched from the life-cycle mapping [life_cycle_mapping] table.
Application scoring profile	The profile used to calculate the application score for strategy.
Application category	The application purpose and function. Use this information to rationalize or consolidate applications.
Application family	A set of related applications that have a common platform or vendor.
Technology stack	Technology stack on which the application was built.
User base	Number of users that are using the applications. Auditing is enabled for this field. Thus, whenever you update the record in this field, the **Activities** field on the **Activities** tab displays the update.
Active user count	Number of active users out of the overall user base. Auditing is enabled for this field.
Last change applied date	Date on which the application was last updated. Auditing is enabled for this field.
Accessibility level	Accessibility level of the business application. Use the following options:

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Business application form (continued)

Field	Description
	• **A (lowest)** • **AA (mid-range)** • **AAA (highest)**
Age in months	Age of the business application, in months. This field is auto-populated when the date and time are entered in the **Installed** field.
Description	Unique description of the application.
Model ID	Product model ID of the business application.

Contract section form fields

Field	Description
Vendor	Vendor details of the application.
Support vendor	Vendor who currently supports the application.
Contract end date	Expiry date of the subscription contract or the support contract. Auditing is enabled for the field.

Planned disposition section form fields

Field	Description
Planned disposition	Planned disposition of a business application. Use the following options: • **Invest**-Business Application is targeted for additional investment. Useful especially once you bring SPM into the fold to drive decision making on demands, projects, and programs. • **Sustain**-Business Application is slated for continued operation, but investment is only at a level to keep it operational. No new growth plans targeted for it at this time. • **Migrate**-Business Application has been targeted for migration off it, based on strategic or other decisions. Users or stakeholders are migrated to a new or different application providing same or similar capabilities. Sometimes precedes Retire, but may also be used for Business Applications migrating from on-prem to cloud or vice a versa.

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Planned disposition section form fields (continued)

Field	Description
	• **Retire**-Business Application is due to retire. Users have either already migrated off the application, or business is divesting out of capabilities it provides, with no replacement planned.
Target date	Target date for the planned disposition. The target date must be the current date or a future date.
Migration Strategy	Migration strategy for the business application. This field appears only when **Migrate** is selected from the **Planned Disposition** field. Use the following options: • **Rehost**-Typical lift & shift – moving the application as-is to a new host. • **Replatform**-Also known as Drop end shop generally used for migration to cloud while abandoning classic licenses and re-purchasing cloud-based licenses. • **Repurchase**- Similar to lift & shift, but also involves minor changes of apps to optimize use of cloud or on-premise or hybrid capabilities. • **Refactor**-Re-architecting the application as part of the migration process. Significant changes planned to it.
Target Business Application	Name of the business application for which you're adding the planned disposition. This field appears only when **Migrate** is selected from the **Planned Disposition** field.
Reasoning	Reason for the planned disposition decision.

Owners section form fields

Field	Description
Portfolio manager	Owner of the portfolio, typically from IT. This field appears when you activate the PPM Standard plugin (com.snc.financial_planning_pmo).
Business owner	Person who owns the application from the business side. Every application should have an assigned business owner.
Managed by	User responsible for overall management of the business application, including

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Owners section form fields (continued)

Field	Description
	maintenance, upgrades, and lifecycle decisions.
Managed by group	Group responsible for overall management of the business application, including maintenance, upgrades, and lifecycle decisions.
IT application owner	Person who owns the application from the IT side. The business application must have an owner assigned to it.
Last updated by	Person who last updated the application record.
Supported by	User responsible for providing day-to-day support for the business application.
Support group	Group responsible for providing day-to-day support for the business application, such as incident resolution and user assistance. For example, for a HR application where employees raise access or usability issues, the HR IT Support group is selected as the support group.

Compliance section form fields

Field	Description
Business criticality	Determines how critical the application is to the business. Auditing is enabled for this field.
Emergency tier	Actions or plans executed for the application in an emergency situation.
Data classification	Security level for the data in the application. This attribute determines which Governance, Risk, and Compliance (GRC) policies are applicable to the application. Use the following options: • **Confidential** • **Highly Sensitive**

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Compliance section form fields (continued)

Field	Description
	• **Internal** • **Public** Auditing is enabled for the field.
Certified	Status of the application that meets your requirements or complies with the policies of your organization.

Activities section form fields

Field	Description
Work notes	Work notes entered by you.

Related topics

Edit business application details in list view

Business application form

Enterprise Architecture helps system admins add any business application to assess and track its costs, usage, business value, functional fitment, and risks.

Business Application Form fields

Field	Description
Name	Name of the business application.
Number	A unique, auto-generated identification number with a configurable prefix for the business application record.
Business process	Business process for which the application is used.
Portfolio	Name of the portfolio to which the application belongs. This field appears when you install the PPM Standard (com.snc.financial_planning_pmo) plugin.
Application type	Type of application. This field indicates whether the application is custom or commercial. • **Homegrown**: Application that is built in-house. • **Commercial off-the-shelf (COTS)**: Application is a commercial application purchased from another company. • **SaaS**: Application is a cloud application managed by third-party vendor.
Publisher	Name of the application publisher.

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Field	Description
Architecture type	Type of application architecture. • **Client Server**: Application structure that divides tasks between the service providers and service requesters. • **N-Tier**: A multi-layered architecture where presentation, processing, and data management exist as physically separate layers. • **Web-based**: Applications accessed over a network connection. • **Other**: Any other type of architecture. • **Platform Host**: Hardware or software that hosts the business application. • **Platform Application**: Application that runs on a platform and can be associated with a host. In this case, the business application relies on the platform for standard operations such as development tools, execution services, and data services.
Platform Host	A hardware or software that hosts the business application. This field is required if you select the **Platform Application** value in **Architecture type** field.
Install type	Type of install. Use the following options: • On Premise • Cloud • Hybrid • Third Party Hosted
Platform	Applications hosted by platform.
Business Unit	Business unit that is associated with the selected business application.
Department	Department that is associated with the selected business application.
Installed	Date and time when the application was installed.
Status	Operational status of the application. Use the following options: • Implementing • In Production • Pilot • Retired Auditing is enabled. Thus, whenever a user updates the value in this field, the **Activities** field in the **Activities** tab displays the update.
Life-Cycle Stage	Life-cycle stage of the application. This field is auto-populated based on the value selected in the **Status** field. The data is fetched from the life-cycle mapping [life_cycle_mapping] table.
Life-Cycle Stage Status	Status of the life-cycle stage of the application. This field is auto-populated based on the value selected in the **Status** field. The data is fetched from the life-cycle mapping [life_cycle_mapping] table.

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Field	Description
Application scoring profile	The profile used to calculate the application score for strategy.
Application category	The application purpose and function. Use this information to rationalize or consolidate applications.
Application family	A set of related applications that have a common platform or vendor.
Technology stack	Technology stack on which the application was built.
User base	Number of users using the applications. Auditing is enabled. Thus, whenever a user updates the record in this field, the **Activities** field in the **Activities** tab displays the update.
Active user count	Number of active users out of the overall user base. Auditing is enabled for the field.
Last change applied date	Date on which the application was last updated. Auditing is enabled for the field.
Accessibility level	Accessibility level of the business application. Use the following options: • A (lowest) • AA (mid-range) • AAA (highest)
Age in months	Age of the business application in months. This field is auto-populated when the date and time is entered in the **Installed** field.
Retired	Date when the business application is going to be retired.
Monitor	Select the check box to track the status and performance of the business application.
Description	Unique description of the application. You can also elaborate or shorten the content in this field using Now Assist. For details, see Elaborate or shorten content in form fields.
Model ID	Product model ID of the business application.

Contract section form fields

Field	Description
Vendor	Vendor details of the application.
Support vendor	Vendor who currently supports the application.
Contract end date	Expiry date of the subscription contract or the support contract. Auditing is enabled for the field.

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Planned Disposition section form fields

Field	Description
Planned Disposition	Planned disposition of a business application. Use the following options: • **Invest**-Business Application is targeted for additional investment. Useful especially once you bring SPM into the fold to drive decision making on demands, projects, and programs. • **Sustain**-Business Application is slated for continued operation, but investment is only at a level to keep it operational. No new growth plans targeted for it at this time. • **Migrate**-Business Application has been targeted for migration off it, based on strategic or other decisions. Users or stakeholders are migrated to a new or different application providing same or similar capabilities. Sometimes precedes Retire, but may also be used for Business Applications migrating from on-prem to cloud or vice a versa. • **Retire**-Business Application is due to retire. Users have either already migrated off the application, or business is divesting out of capabilities it provides, with no replacement planned.
Migration Strategy	Migration strategy for the business application. This field appears only when **Migrate** is selected from the **Planned Disposition** field. Use the following options: • **Rehost**-Typical lift & shift – moving the application as-is to a new host. • **Replatform**-Similar to lift & shift, but also involves minor changes of apps to optimize use of cloud or on-prem or hybrid capabilities. • **Repurchase**-Also known as drop and shop. Generally used for migration to cloud while abandoning classic licenses and repurchasing cloud-based licenses. • **Refactor**-Re-architecting the app as part of the migration process. Significant changes planned to it.
Target Business Application	Name of the business application for which you're adding the planned disposition. This

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Planned Disposition section form fields (continued)

Field	Description
	field appears only when **Migrate** is selected from the **Planned Disposition** field.
Reasoning	Reason for the planned disposition decision. You can also generate, elaborate, or shorten the content in this field using Now Assist. For details, see Elaborate or shorten content in form fields.

Owners section form fields

Field	Description
Portfolio manager	Owner of the portfolio, typically from IT. This field appears when you install the PPM Standard plugin (com.snc.financial_planning_pmo).
Business owner	Person who owns the application from the business side. Every application should have an assigned business owner.
Managed by	User responsible for overall management of the business application, including maintenance, upgrades, and lifecycle decisions.
Managed by group	Group responsible for overall management of the business application, including maintenance, upgrades, and lifecycle decisions.
IT Application owner	Person who owns the application from the IT side. The business application must have an owner assigned to it. If you're designated as the IT Application owner, then you can view all the applications for which you're the owner in the **My Applications** menu.
Last updated by	Person who last updated the application record.
Supported by	User responsible for providing day-to-day support for the business application.

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Owners section form fields (continued)

Field	Description
Support group	Group responsible for providing day-to-day support for the business application, such as incident resolution and user assistance. For example, for a HR application where employees raise access or usability issues, the HR IT Support group is selected as the support group.

Compliance section form fields

Field	Description
Business criticality	How critical the application is to the business. Auditing is enabled for the field.
Emergency tier	Actions or plans executed for the application in an emergency situation.
Data classification	Security level for the data in the application. This attribute determines which Governance, Risk, and Compliance (GRC) policies are applicable to the application. Auditing is enabled for the field.
Certified	Status of the application that it meets requirements or complies with the policies of your organization.

Activities section form fields

Field	Description
Work notes	Work notes entered by you.

Related topics

- Add or edit a business application
- Create a business application and associate with a Technology Reference Model product

Business process activity form

Fields for creating and configuring business process activities that represent discrete units of work in your organization.

Create business process activity form fields

Field	Description
Name	Unique name of the business process activity. Example: Approve Purchase Order.

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Create business process activity form fields (continued)

Field	Description
Description	Brief explanation of the work performed by the activity.
Activity Type	Classification of the activity. Example: Manual Task.
Owned by	User who owns the business process activity.
Managed by group	Group that manages the business process activity.

Related topics

- Manage business process activities
- Add or edit a business process activity

Certification policy form in Enterprise Architecture Workspace

A system administrator with Enterprise Architecture (formerly APM) admin role can create and assign data certification tasks to the system owners for certifying business application data.

CMDB Data Management Certification Policy form

Field	Description
Display Fields	Fields to be displayed from the business application.
Certification Fields	Fields to be displayed that require individual field certification. Specify the fields that you want to be certified.
Instructions	Detailed instruction to the application owner about the task.
Allow Empty Fields	Add empty fields to the form. On selecting this field, reviewers can certify or fail a certification even if one or more certification fields are empty.

Related topics

- Configure certification policies
- Add or edit a certification policy

Certification schedule form in Enterprise Architecture Workspace

A system administrator with Enterprise Architecture (formerly APM) admin role can create and assign data certification tasks to the system owners for certifying business application data.

Certification Schedule form fields

Field	Description
Name	Name of the certification schedule.

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Field	Description
Filter	Select a filter for the table data.
Table	The table consisting the data that is to be certified. Defaults to cmdb_ci_business_application table. **Note:** Data certification can be applied only on one table at a time. Create another table if you require data certification on that table.
Display fields	Select the fields to be displayed from the business application. **Note:** Display fields can't be the same as Certification fields. They're mutually exclusive.
Certification fields	Select fields to be displayed that require individual field certification. Specify the fields that you want to be certified. **Application URL**, **Business criticality**, **Data classification**, **Contract end date**, **Active**, **Active user count**, **Status**, **User base**, and **Last change applied date** are some of the fields preconfigured for data certification.
Assignment type	Select a user reference field from the target table. • **User field**: Select and assign a specific field in the Business application table in the **Assign to** field. • **Specific User**: Select and assign a specific user in the **User** field. • **Group Field**: Assign the certification schedule to a group in the **Assign to group** field. • **Specific Group**: Select and assign the certification schedule to a group in the **Group** field.
Assign to	Owner of the application who is responsible for certifying the data of the business application.
User	Select a user to whom all the unassigned tasks will be assigned to.
Assign to group	Select a group from the business application table.

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Field	Description
Group	Select a group from the list.
Assign to empty	Select a value from the list: • **Do Not Create Task**: Certification task is not created for these records. • **Create Unassigned Task**: Certification task is created but is unassigned. • **Create Assigned Task**: Certification task is created and assigned to the specific user or group. **Note:** The field is available only when you select the **Assignment type** as **User Field** or **Group Field**.
Days to complete	Enter the number of days by which you require the certification to be completed.
Active	The job is inactive by default. Select the check box to run the scheduled job.
Run	Frequency with which the certification task is performed: Daily, Weekly, Monthly, Periodically, Once, On Demand.
Last run date	Defaults to the prior date when the certification was run. The field cannot be edited if the certification schedule is a new record.
Task description	Brief description of the certification task.
Instructions	Detailed instruction to the application owner about the task.

Certification Instances section fields

Field	Description
Number	Number of the certification instance.
Certification Schedule	Defines the information that requires certification and the frequency of execution. Defaults to the certification schedule that you selected.
State	Status of the certification: **Work in Progress** or **Complete**.
Created	Created date of the certification instance.
Complete by	The date on which the certification task is to be completed. **Days to complete** is added to the **Created** date.
Percent complete	For each field (out of the total number of certification fields) that the application owner

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Certification Instances section fields (continued)

Field	Description
	certifies the percent is calculated. The system administrator can track the progress of the data certification task.
Short description	Brief description of the certification instance.

Certification Tasks section fields

Field	Description
Number	Number assigned to the certification task.
Assigned to	Owner of the application to whom the task is assigned and who is authorized to certify the data.
Assignment group	Task can also be assigned to users of a group.
Escalation	Defaults to Normal.

Related topics

Add or edit a certification policy

Manage certification policies

Create a business capability map form

Creating artifacts for the business capability hierarchy map helps you to update the capability hierarchy directly in the map using Enterprise Modeling and Visualization.

Create a business capability map form fields

Field	Description
Link to artifact	Artifact to which you want to associate the diagram. Use the following options: • **New artifact**-Select to create an artifact and associate the diagram. • **Existing artifact**-Select to associate the diagram to an existing artifact.
Artifact name	Name of the artifact. Enter a name of the new artifact or select an existing artifact name based on the selection in the **Link to artifact** field.
Architectural category	Name of the category for the artifact.
Include business application	Select this check box to include business applications of a capability in the hierarchy map.
Include all business capabilities	Select this check box to include all the business capabilities in the hierarchy map.

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Field	Description
Business capability	Name of the business capabilities for which you want to generate the hierarchy map. You can level-0 capabilities from the list. **Note:** This field does not appear when you select the check box for the field **Include all business capabilities**.

Related topics

- Create a diagram for a business capability map
- Create a business hierarchy map form

Create a business hierarchy map form

Creating artifacts for the business capability hierarchy map helps you to update the capability hierarchy directly in the map using Enterprise Modeling and Visualization.

Create a business hierarchy map form fields

Field	Description
Link to artifact	Artifact to which you want to associate the diagram. Use the following options: • **New artifact**-Select to create an artifact and associate the diagram. • **Existing artifact**-Select to associate the diagram to an existing artifact.
Artifact name	Name of the artifact. Enter a name of the new artifact or select an existing artifact name based on the selection in the **Link to artifact** field.
Architectural category	Name of the category for the artifact.
Business application	Name of the business application. Select a business application to create the hierarchy map for it.

Related topics

- Create diagram for a business hierarchy map

Create a business process map form

Create a business process map and associate an artifact for the map using Enterprise Modeling and Visualization.

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Create a business process map form fields

Field	Description
Link to business process	Option to specify whether the business process is new or an existing one. Use the following options: • **New**-Select to create a new business process and an artifact to associate to the diagram. • **Existing**-Select to associate the diagram to an existing business process.
Business process name	Name of the business process. Enter a name of the new business process. This field appears only when you select **New** in the **Link to business process** field.
Select existing business process	The existing business process to associate with the diagram. This field appears only when you select **Existing** in the **Link to business process** field.
Artifact name	Name of the artifact. This field is auto populated based on the entry in the **Link to business process** field.

Create a business unit form

Create a business unit to define your organizational functions.

Create business unit form fields

Field	Description
Name	Name of the business unit.
Company	The company, if any, related with this business unit.
Business unit head	The person who heads the business unit.
Description	A description of the business unit.
Parent	Refers to another business unit. The **Parent** field makes the business unit a hierarchy element.

Related topics

Exploring business units

Add or edit a business unit

Create a driver form

The create new driver form contains fields for documenting internal or external conditions that motivate your organization to define goals and implement changes.

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Create a driver form

Field	Description
Name	Unique name of the driver.
Source	Origin of the driver: **External** or **Internal**.
Driver type	Category of the driver. Available options depend on the **Source** value. • When **Source** is **External**: Competitor, Customer, Environment, Partner, Government, Legal, Economic, Social, or Technological. • When **Source** is **Internal**: Assumption, Corporate, Infrastructure, Resource, or Other.
Urgency	Rating of how quickly the organization must respond to the driver.
Description	Explanation of the condition, its origin, and what it motivates.

Related topics

Manage drivers

Add or edit a driver

Create a portal knowledge base form

Create a new portal knowledge base to associate a portal with a knowledge base so that users can access the published TRM catalog from the selected portal.

Create portal knowledge base form fields

Field	Description
Active	Select the check box to enable the mapping, or clear it to disable the portal and knowledge base mapping.
Knowledge Base	Select a knowledge base from the list.
Application	Uses the default value (for example, Global).
Order	Specify the display order for the knowledge base in the portal.
Portal	Select an existing portal to associate with the knowledge base.

Related topics

Associate a portal with a knowledge base

Create a stakeholder form

The create a stakeholder form captures information about individuals or teams with an interest in enterprise architecture outcomes.

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Create a stakeholder form

Field	Description
Name	Unique name of the stakeholder. Example: Chief Financial Officer or Retail Customer.
Stakeholder type	Classification of the stakeholder. Examples: Internal, External, Customer, Supplier, or Regulator.
Group	Organizational group associated with the stakeholder.
Department	Department associated with the stakeholder.
Interest level	Rating of the stakeholder's interest in the organization or a specific service or project. Examples: 1-Strong Resistance through 5-Strong Willingness.
Influence level	Rating of the stakeholder's ability to impact the organization or a specific project. Examples: High, Medium, or Low.
Description	Explanation of the stakeholder's interests, influence, and relationship to the organization.

Related topics

Manage stakeholders

Add or edit a stakeholder

Create a sub-capability form

Create a sub-capability and add it to the capability hierarchy map.

Create sub-capability form fields

Field	Description
Name	Name of the sub-capability.
Description	A short description of the sub-capability.
Parent	Name of the parent capability for the sub-capability that you're creating.

Related topics

Create a sub-capability

Create application category form

Create an application category to categorize applications and rationalize decisions on their usage.

Create application category form fields

Field	Description
Name	Unique name of the application category.
Category group	The category group with which the application category is associated.
Description	Description of the application category.

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Related topics

- Manage application categories
- Add or edit an application category

Create application category group form

Create an application category group or edit an existing one to align it with your business requirements.

Create application category form fields

Field	Description
Name	Unique name of the application category group.
Description	Description of the application category group.

Related topics

- Manage application category groups
- Add or edit an application category group

Create application family form

Create an application family to align it with your business requirements.

Create application family form fields

Field	Description
Name	Unique name of the application family.
Description	Description of the family.
Domain	Domain that the application family is associated with. Specifies the organizational domain that owns the application family. Use this field in domain-separated or multi-tenant environments to control visibility and ownership of application families across organizational boundaries. In single-domain instances, leave this field set to the default domain. In domain-separated environments, select the domain that is responsible for governing and maintaining the application family.

Related topics

- Manage application families
- Add or edit an application family

Create application model form

Add an application model to a value stream for better management of your application portfolios.

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Create application model form

Field	Description
Description	A description of the model as it appears in the product catalog.
Manufacturer	The company that built the model.
Model categories	The category to which the model is assigned.
Name	The manufacturer-assigned name of the model.
Short description	A brief description of the model.
Comments	Information about the model that would be helpful for others to know.

Application Model section form fields

Field	Description
Manufacturer	The company that built the model.
Model categories	The category to which the model is assigned.
Name	The manufacturer-assigned name of the model.
Short description	A brief description of the model.
Comments	Information about the model that would be helpful for others to know.

Related topics

Exploring value streams

Associate an application model to a value stream

Create architectural artifact form

Architectural artifacts describe a system, solution, or state of an enterprise. The architectural artifacts in the Enterprise Architecture Workspace enable Enterprise Architects to create and manage the artifacts used in their organization.

Create architectural artifact form fields

Field	Description
Name	Name of the artifact.
Owner	Owner of the artifact. The owner is the creator.
Architectural Category	Architectural category for the newly created artifact. Look up and select the architectural category
Description	Description for the artifact request.

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Access Settings section fields

Field	Description
By referenced records	Option to provide access to the Enterprise Architecture Workspace users to access the artifacts by referenced records. When an artifact is associated to a business capability or business application, any Enterprise Architecture Workspace user who can access those business entities can also access the associated artifacts.
Admin access	Option to provide access to document management admin. The users with the document management admin role can have the access to the artifacts.
Sharing permissions	Option to provide access to share documents with other users and groups. You can provide the following permissions: • Role Permissions • User Criteria Permissions • User Permissions • Group Permissions

Related topics

Create or edit an architectural artifact from Portfolio page

Associate an Architectural Artifact to a TRM product

Create architectural artifact version form

Create new versions of architectural artifacts.

Create architectural artifact version form fields

Field	Description
Version	Displays the new version number of the architectural artifact.
Format	Select the file type. Perform one of the following: • To upload a file, select **Attachment**, and then select **Add File** in the **Attachments** section of the page. • To link to a document, select **URL** and provide the link.
URL	Enter the URL for which you want to create a new architectural artifact version. This field is only available when you select **URL** in the **File type** field.

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Create architectural artifact version form fields (continued)

Field	Description
Attachments	Select the attachment that you want to add to the new architectural artifact. This field is only available when you select **Attachment** in the **File type** field.

Related topics

Exploring architectural decision records (ADR)

Add or edit an architectural decision record (ADR)

Create business capability form

Business Capability is a common table used within the Enterprise Architecture application.

Create business capability form fields

Field	Description
Name	Name of the business capability.
Parent	Name of the parent capability for the capability that you're creating.
Level	Level at which the capability is in the hierarchy. This field is auto-populated and can't be edited.
Business Unit	Name of the business unit in the organizational structure. Before Australia Patch 5, this field was the only way to associate a business unit with a business capability, and accepted a single value. This field has been removed from the default form view and replaced with the **Related business units** related list, which lets you associate multiple business units. The field still exists on the table — administrators can add it back to the form from Form Layout if needed. Associations that existed before the upgrade are not automatically migrated; you must explicitly add the business unit to the Related business units related list.
Order	Position of the capability in the sequential order of all other business capabilities in that capability hierarchy.
Department	Name of the department in the organizational structure.
Owned by	User who owns the business capability.
Leaf Node	Option to select if the capability doesn't have a child capability.

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Field	Description
Hierarchy ID	Hierarchy ID of the capability. This field is auto-populated based on the order.
Description	A short description of the business capability. You can also elaborate or shorten the content in this field using Now Assist. For details, see Elaborate or shorten content in form fields.

Related topics

Add or edit a business capability from the Portfolio page

Create business process form

A business process is a collection of related structured tasks performed to accomplish a specific application service. Create a business process to group applications that help accomplish a specific application service.

Business Process form fields

Field	Description
Name	Unique name for the business process.
Parent	Parent business process **Note:** If the parent process exists, it creates a hierarchy of business processes.
Review frequency	Frequency for reviewing the business process.
Description	Short description of the business process. You can also elaborate or shorten the content in this field using Now Assist. For details, see Elaborate or shorten content in form fields.

Ownership section form fields

Field	Description
Managed By Group	Group that maintains the business process.
Approval group	Group that reviews and approves the business process.
Owned by	User responsible for the business process. This user is a member of the **Managed by Group**.

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Business Impact section form fields

Field	Description
Business criticality declared	Criticality of the business process based on your subjective assessment. The available options are: • **1- most critical** • **2- somewhat critical** • **3- less critical** • **4- not critical**
Impact to confidentiality	Risk rating for the risk of loss of confidentiality. Confidentiality loss leads to leakage of confidential information. The available options are: • **High** • **Medium** • **Low**
Impact to availability	Risk rating for the risk of loss of availability. Unavailability of the system may cause delays in decision making, business interruptions, loss of revenue, and customer dissatisfaction. The available options are: • **High** • **Medium** • **Low**
Business critically determined	Computed criticality of the business process based on the assessment of the sub-processes. The available options are: • **1- most critical** • **2- somewhat critical** • **3- less critical** • **4- not critical**
Impact to integrity	Risk rating for the risk of impact to integrity. Impact to integrity has consequences for businesses and employees, including fines and damage to your brand, reputation, and people. The available options are: • **1- High** • **2- Medium** • **3- Low**

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Related topics

- Exploring business processes
- Add or edit a business process
- View all business processes

Create business role form

Use this form to create or edit a business role that defines the responsibilities, rights, and duties associated with performing specific business behavior.

Create business role form

Field	Description
Name	Name of the business role — for example, Credit Officer or Product Manager.
Parent role	Business role that is higher in the organizational hierarchy. This field makes the business role part of a role hierarchy.
Group	Organizational group associated with the business role.
Department	Department where the business role is primarily located.
Required skills	Skills and competencies required to perform the business role.
Description	Responsibilities and purpose of the business role.

Related topics

- Manage business roles
- Add or edit a business role

Create demand form

Create a demand for your application or capability.

Create demand form fields

Field	Description
Assumptions	Assumptions made for the demand. Assumptions help to define scope and risks, and fine-tune the estimates for time and cost.
Approved end date	The approved date for completing the demand.
Approved start date	The approved date for starting the demand.
Action	Course of action for the demand.
Barriers	Major barriers to the demand.
Business capabilities	One or more capabilities to associate the demand with.
Impacted business applications	Business applications that are impacted by the demand.

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Create demand form fields (continued)

Field	Description
Capital budget	Total capital budget allocated to the demand across all fiscal years. The value is rolled up from the Capital expenditure (Capex) budget of the demand.
Category	Category of the demand. The available options are: • **Strategic** • **Operational**
Business unit	Business unit to which the demand submitter belongs.
Capital expense	Capital expenditure (Capex) for the demand.
Business case	Business arguments that support the demand.
Collaborators	Users who can edit or contribute to the demand. A demand requester can select any user as a collaborator.
Demand manager	Name of the demand manager.
Demand	The name of the demand.
Enablers	Key enablers of the demand.
Demand actual cost	Total cost incurred while working on a demand and demand tasks. **Note:** To populate this field, you must run the **Update Demand Actual Cost and Actual Effort** schedule job.
Demand actual effort	Time accrued or spent by a resource while working on a demand or a demand task. **Note:** To populate this field, you must run the *Update Demand Actual Cost and Actual Effort* schedule job.
Financial return	Result is calculated based on values in the **Total costs** and **Financial benefit** fields.
Risk level	The level of risk associated with the demand. The available options are: • **Critical** • **High** • **Moderate**

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Create demand form fields (continued)

Field	Description
	• **Low** • **Planning**
Financial benefit	Estimate of revenue if the demand is approved. This value is rolled up from the benefit breakdown of the demand. You can also enter the value manually. Select a currency icon and enter a value.
ROI %	Assesses demand return on investment (ROI) compared to other demands.
Impacted business units	Business unit that is impacted by the demand.
Labor costs	Expenses associated with the manpower required to work on the demand.
In scope	Scope of the demand. It's the set of boundaries that define the extent of a demand.
Operating budget	Total operational budget allocated to the demand across all fiscal years. The value is rolled up from the Operational expenditure (Opex) budget of the demand.
Related records	Records associated with the demand.
Risk of not performing	Risks if the demand is not approved, for example, risk of loss of opportunity.
Due date	Requested completion date of the demand.
Risk of performing	Risks if the demand is approved and implemented.
Operating expense	Operational expenditure (Opex) for the demand.
Other costs	Other miscellaneous costs associated with the demand.
Out of scope	Activities or deliverables that aren't in the scope of the demand. Anything which isn't defined in the scope is out of scope.
Cost	Total cost associated with the demand.
Score	Demand score is calculated based on **Risk**, **Value**, and **Size** attributes in the base system.

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Create demand form fields (continued)

Field	Description
	• When the **Risk** and **Size** are high, the score of the demand is low. • When the **Value** is high, the score of the demand is high.
Risk	Risk value calculated from the demand assessment.
Strategic Alignment	A value to assess how closely the demand aligns with the strategic goals of the organization.
Value	Business value of the demand.
Type	Type of the demand. The available options are: • Project • Change The **Category** field selection determines the options available in the **Type** field.
Size	Size of the demand.
T-shirt size	Categorizing the demand into different sizes, to give a quick understanding of the relative complexity of the demand and the effort required for its completion. The available sizes are: • **S- Small** • **M- Medium** • **L- Large** • **XL- Extra Large** • **XXL- Extra Extra Large**
Stage	The current state of progression of the demand.
Start date	Start date of the demand.
Submitted on	Date on which the demand was submitted for approval.
Total planned cost	Result is calculated based on values in the **Capital expense** and **Operating expense** fields.
Visited states	The different states through which the demand has passed through.

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Create demand form fields (continued)

Field	Description
	For example, the demand has gone through the states of **Open** and **Closed**. The visited state number in this scenario will be 2.
Primary goal	The primary goal behind the creation of the demand
Digital integration	Digital integration associated with the demand.

Related topics

Exploring demands

Add or edit a demand

Create demand form

Use a demand as a step to identify cost-saving opportunities on the business applications and meet your targets.

Create demand form

Field	Description
Action	The course of action for the new demand. **Note:** The **Action** field is available only when you launch the form within the Enterprise Architecture module when the Enterprise Architecture plugin is activated.
Name	Name of the demand.
Due date	Requested completion date of the demand.
Number	A unique, auto-generated identification number for the demand.
Start date	Start date of the demand.

Details section form fields

Field	Description
Business capabilities	One or more business capabilities to associate the demand with.
Business applications	Business applications that you add to the demand. You can select any business application in your enterprise, irrespective of it being related

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Details section form fields (continued)

Field	Description
	or not related to the capability that you've selected in the **Business capabilities** field.

Related topics

- Create a demand using the bubble chart
- Create a demand using the list view

Create department form

Create a business unit to define your organizational functions.

Create department form fields

Field	Description
Name	Name of the department.
ID	A unique identification number of the department
Department head	The person who heads the department.
Primary contact	The person who is the primary point of contact for anything associated with the department.
Description	A description of the department

Related topics

- Exploring departments
- Add or edit a department

Create diagram action form

The diagram action form helps you to create action for a custom shape that can be used in the Enterprise Modeling and Visualization.

Diagram action form fields

Field	Description
Name	Name of the diagram action.
Diagram builder configuration	Select APM diagram configuration from the list.
Description	Enter description for the configuration.
Active	Select roles to enable the action.
Application	System sets this field to Global. This is a non-editable field.
Node type	Select either of the following options as a node type:

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Field	Description
	• Image node container • Image node container with connectors
Category	Select a category for the diagram action.
Sub category	Select a sub category for the diagram action.
Description	Enter a description for the diagram action.
Icon	Enter name of the icon for which you want to associate the diagram action.

Related topics

Create a diagram action for a custom shape

Create diagram for a business capability form

An Enterprise architect can create a diagram using Lucidchart for a business capability maps and associate it with an architectural artifact.

Create diagram form fields

Field	Description
Diagram Name	Name of the diagram.
Diagram Type	Type of the diagram. It can be either of the following: • Business Application Hierarchy • Business Capability Map This field is auto-populated when creating the diagram from a business application or business capability view.
Include Business Applications	Option to include business applications.
All Business Capabilities	Option to include all business capabilities maps in the diagram.
Business Capabilities	List of business capabilities for which you want to create the diagram. You can search and add multiple capabilities. **Note:** If you have selected the check box for **All Business Capabilities** in the previous step, then this field does not appear.
Diagramming Tool	The tool using which you are creating the diagram. This field is automatically set to **Lucidchart**.

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Field	Description
Link to Artifact	Artifact to which you want to associate the diagram. Use the following options: • **None**: Select to view the diagram but not associate with any artifact. • **New Artifact**: Select to create an artifact and associate the diagram. • **Existing Artifact**: Select to associate the diagram to an existing artifact.
Artifact Name	Name of the artifact. This field appears only when **New Artifact** or **Existing Artifact** is selected from the **Link to Artifact** field.
Folder	Name of the Lucid folder. Select the folder where you want to save the diagram. When you select a folder, its sub folders are displayed.

Related topics

Create a Lucidchart diagram for a business capability in the Enterprise Architecture Workspace

Create diagram form for a business application

An Enterprise architect can create a diagram using Lucidchart for a business application hierarchy and associate it with an architectural artifact.

Create Diagram form fields

Field	Description
Diagramming Tool	The tool that you use to create the diagram. • Enterprise Modeling and Visualization • Lucidchart.
Diagram Name	Name of the diagram. **Note:** This field appears only when you select Lucidchart in the Diagramming tool field.
Link to Artifact	Artifact to which you want to associate the diagram. Use the following options:

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Field	Description
	• **None**: Select to view the diagram but not associate with any artifact. • **New Artifact**: Select to create an artifact and associate the diagram. • **Existing Artifact**: Select to associate the diagram to an existing artifact.
Artifact Name	Name of the artifact. This field appears only when **New Artifact** or **Existing Artifact** is selected from the **Link to Artifact** field.
Diagram Type	Type of the diagram. It can be either of the following: • Business Application Hierarchy • Business Capability Map This field is auto-populated when creating the diagram from a business application or business capability view.
Business Application	Name of the Business Application for which you are creating the diagram. This field is auto-populated when creating the diagram from a business application view.
Entities	Entities that are included in the chart. Select the following to include in the diagram: • Application Service: Server (Hardware Model or Software Product) • Business Capability • Demand • Digital Integration • Digital Interface • Information Object • Project **Note:** The Project option is available when the PPM Standard plugin installed.
Folder	Name of the Lucid folder. Select the folder where you want to save the diagram. When you select a folder, its sub folders are displayed.

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Field	Description
	Note: This field appears only when you select Lucidchart in the Diagramming tool field.

Related topics

Create a Lucidchart diagram for a business application

Create goal form

Use the Goal form to create goals for your organizational strategic priorities.

Create goal form fields

Field	Description
Name	Name of the goal.
Parent goal	Name of the parent goal that this goal contributes to.
Start date	Start date for the goal. By default, the start date of the current quarter is populated.
Owner	Owner of the goal. By default, the name of the user creating the goal is populated.
Status	Status of the goal. The available options are: • **Red**: Indicates that the goal needs immediate attention. • **Yellow**: Indicates that the target needs improvement. • **Green**: Indicates that the target is on track. • **None**
Impact on parent goal	A numerical value that represents the importance of this goal relative to sibling goals or other goals under its parent goal. By default, the value is (1) Neutral. The available options are: • **(0) No impact** • **(1) Neutral** • **(2) Moderate** • **(3) High** • **(4) Very high** • **(5) Maximum**

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Create goal form fields (continued)

Field	Description
	Note: This field is available only when the *sn_gf.weighted_average_enabled* system property is set to **Yes**.
Assigned entity type	Entity type to which the goal is assigned. For example, Business Unit or Department.
State	State of the goal. The available options are: • **Draft** • **In Progress** • **Approved** • **Complete** • **Pending** • **Achieved** • **Not Achieved**
Strategic priority	Name of the strategic priority that this goal is created for.
End date	End date for the goal. By default, the end date of the current quarter is populated.
Category	Category of the goal. The available options are: • **Total Applications** • **Total Cost** • **Opex Capex** • **Cloud Applications** • **Homegrown Applications** • **Support Cost Labor Cost**
Contributors	Users who contribute to the achievement of the goal.
Progress	Percentage complete for the goal. The progress value is calculated automatically if the goal has subgoals or/and targets.
Assigned entity	Entity to which the goal is assigned.
Comments	Detailed comments for the goal to facilitate collaboration.

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Related topics

- Exploring goals
- Add or edit a goal
- Create a sub-goal

Create indicator form

Create an application or capability indicator to assess applications or capabilities within the indicator framework.

Create indicator form fields

Field	Description
Name	Name of the application or capability indicator.
Short description	Short summary of the application or profile indicator.
Result limit	The maximum number of records an indicator displays when running an associated script. This enables better performance of Enterprise Architecture by not processing too many records.
Category	Category that the indicator is associated with.
Direction	Business applications or capabilities with maximum or minimum values. • Select **Minimize** if lower values are better. • Select **Maximize** if higher values are better.
Unit	The type of unit in which indicator scores are displayed. Units can be numbers, percentages, currencies, quantities of time, or any other entity you define.
Automatic refresh interval	The refresh interval to update the indicator scores within the defined time range.
Order	The position of the indicator in the sequential order of all other indicators while accessing an application or capability.

Data source configuration section fields

Field	Description
Data source	Defines the location from which the indicator receives data. • **Performance Analytics**: Collects scores from indicators created in Performance Analytics. See Performance Analytics indicators.

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Data source configuration section fields (continued)

Field	Description

	• **Custom Script**: Allows you to write a script that collects data from another application. Beneath the **Data Source** field, a sample script appears. Customize the script as needed. An example custom script is:
	`var results = {};`
	`var applications = [];`
	`var incidentCount = 0;`
	`var applicationsGr = new GlideRecord("cmdb_ci_business_app");`
	`applicationsGr.addQuery('active', true);`
	`applicationsGr.query();`
	`//for each application get incident count at business service level`
	`while(applicationsGr.next()){`
	`incidentCount = 0;`
	`var gr = new GlideRecord("incident");`
	`gr.addEncodedQuery("opened_atBETWEEN" + startDate + "@" + endDate);`
	`gr.addQuery('cmdb_ci_business_app', applicationsGr.getUniqueValue());`
	`gr.query();`
	`incidentCount = gr.getRowCount();`
	`var appInfo = {};`
	`appInfo.appId = applicationsGr.getUniqueValue();`
	`appInfo.weight = incidentCount;`
	`applications.push(appInfo);`
	`}`
	`results.applications = applications;`
	`results;`
	• **Query Condition**: Allows you to select a table to run filters on to obtain data.

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Data source configuration section fields (continued)

Field	Description
	• **Assessments**: Allows you to evaluate, score, and rank records by assessing records in a table. • **Indicators**: Allows you to add dependent child indicators. Through the child indicators, data is gathered to the parent indicator. For example, if the parent indicator is number of issues, the dependent indicators can be number of incident counts, number of problems, and changes. These dependent indicators are child indicators and the number of incidents, problems, and changes recorded are consolidated up to the parent indicator as the number of issues.
Indicator	The **Indicator** field appears when **Performance Analytics** is selected from the **Data source** list. Indicators are statistics that are used to measure current conditions and forecast trends. **Note:** If the collection frequency of the application indicator isn't greater than the frequency at which the data of the Performance Analytic indicator are generated, then the system displays an error message: `Frequency of the indicator must always be greater than or equal to the frequency of the datasource configuration indicator`.
Default breakdown	Name of the Performance Analytics breakdown.
Normalized script	A script to evaluate and score business applications and capabilities using standardized metrics. It involves using indicators that provide a normalized score for the condition they are evaluating. These indicators can be based on assessments, query conditions, custom scripts, or performance analytics.

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Click Through section fields

Field	Description
Click through URL navigation type	Select whether to view the application or capability indicator details in a new window, in the same window, or in a dialog box.
Click through URL script	The script associated with an indicator that allows users to select a URL and view the indicator data in a related application or dashboard. This enables quick access to relevant information, or actions related to the indicator data.

Related topics

- Manage indicators
- Add or edit an application indicator
- Add or edit a capability indicator

Create information object form

An information object captures the logical data for the business application.

Information Object form fields

Field	Description
Name	Name of the information object.
Data classification	Category of data. Displays the classification tags applied on the information object.
Owned by	User who owns the information object.
Business Unit	Business unit that owns the information object.
Department	Department in the business unit that actually owns the information.
Description	Short description of the information object. You can also elaborate or shorten the content in this field using Now Assist. For details, see Elaborate or shorten content in form fields.

Related topics

- Exploring information objects
- Add or edit an information object

Create product capability form

Use a product capability to specify the feature that a business application or Technology Reference Model product provides to support business objectives.

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Product capability form fields

Field	Description
Name	Name of the product capability.
Company	The company, if any, related to the product capability.
Description	A short description of the product capability and its features and purpose.
Type	Categorizes the product capability based on its technical nature. This helps to distinguish between different types of features provided by business applications or Technology Reference Model products. Use the following options: • **Feature** • **Capability** • **Technical Service**
Category	A broader classification that groups similar capabilities together.

Related topics

- Add or edit a product capability
- Associate a product capability with a business application
- Create product capabilities and associate it with a Technology Reference Model product
- Exploring product capabilities

Create TRM product form

The Create TRM product form lets you add a software or hardware product directly to the TRM library. The record is created immediately without an approval request.

Details section

Field	Description
Type	The type of the TRM product. Select **Software** or **Hardware**. The fields displayed in the form change based on the type selected.
Company	Company of the TRM product. Look up and select a company from the list.
Category	Category of the product. Look up and select a category from the TRM Categories page.
Name	Name of the TRM product.
TRM Phase	Phase of the product. Use the following list: • Approved • Approved with Constraints • Divest

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Field	Description
	• Evaluation • Unapproved
Investment direction	Purpose for the investment. Use the following list: • Divest • Eliminated • Invest • Maintain
Business Justification	Business justification for the product.
Approval	The approval status of the TRM product. Defaults to **Not Yet Requested** when the form opens.

TRM product lifecycles section

This section appears on the **TRM product lifecycles** tab. After you fill in the mandatory fields on the **Details** tab, select **Add version/edition** to display the lifecycle fields and add a lifecycle record. Adding lifecycle records is optional.

Note:

- For software products: You can add up to 5 version and edition combinations, with a maximum of 10 phases per combination.
- For hardware products: You can add up to 5 hardware models, with a maximum of 10 phases per hardware model.

Field	Description
Version	The version of the TRM software product. This field appears only when a TRM product of type Software is selected in the **Type** field. To create a TRM software product lifecycle with a wildcard, end the version with an asterisk (*).
Edition	The edition of the TRM software product. This field appears only when a TRM product of type Software is selected in the **Type** field.
Hardware model	The hardware model for the lifecycle record. This field appears only when a TRM product of type Hardware is selected in the **Type** field.
TRM phase	Phase of the product lifecycle. Look up and select a phase from the TRM Phases as defined in the Setup page (Enterprise Architecture Workspace > Setup > TRM Phases). This field is required.
Phase start date	Start date of the product lifecycle phase. This field is required.
Phase end date	End date of the product lifecycle phase.

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Related topics

- Request a TRM product in Enterprise Architecture Workspace
- Add or edit your TRM products
- Create a TRM product in Enterprise Architecture Workspace

Create profile indicator form

You can use indicators within many scoring profiles, which generate indicator scores unique to that scoring profile.

Create profile indicator form fields

Field	Description
Profile	Name of the application scoring profile.
Used in CI score calculation	Option for using the application indicator in calculating the application score.
Evaluate With In Scoring Profile Applications	Option for considering the business applications tied to the selected scoring profile in the evaluation of scores. Clearing the check box entails evaluation of all business applications within the enterprise or across all scoring profiles.
Indicator	Name of the application indicator.
Domain	The domain to which this indicator belongs.
Weightage	Numeral value for the indicator. The weight provided in the application score profile for an indicator contributes to the total score of the application. All indicator weight within a scoring profile must add up to 100.

Related topics

- Attach a profile indicator to a scoring profile

Create publishing configuration form

Specify the configuration that is used for publishing a Technology Reference Model (TRM) catalog to the knowledge base.

Create publishing configuration form fields

Field	Description
Catalog name	Name of the TRM catalog.
Catalog type	Select the catalog type as TRM.
Access type	Select the type of access for the catalog. It can be either of the following:

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Create publishing configuration form fields (continued)

Field	Description
	• Internal- For internal users only. Users must sign in to access the published catalog in the Knowledge Base. • Public- For all users. The catalog can be configured to allow guest access to published content.
Status	Status of the catalog. While creating the catalog, this field is set to **Draft**.
Catalog link	Link to access the published TRM catalog. This field is auto-populated with a URL after the catalog is published.

Related topics

Create a configuration to publish TRM data

Publish a TRM catalog to the knowledge base

Create related entities form

Enterprise Architecture Workspace enables Enterprise Architects to associate an architectural artifact to existing elements in the ServiceNow AI Platform. These associations create a relationship between the artifact and related entities such as business capabilities, business applications, digital integrations, digital interfaces, and TRM products.

Related Entities form fields

Related Entities form

Field	Description
Architectural Artifact	Name of the architectural artifact.
Entity	Type of the business entity. The entity type can be a business application, business capability, digital integration, digital interface, or a TRM product.
Target Record	Name of the particular business application or business capability or digital integration or digital interface, or a TRM product to which you want to associate the artifact.

Related topics

Add a related entity to an architectural artifact

Create scoring profile form

Create an application score profile and update the default application profile with new profile indicators per your requirements.

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Create scoring profile form fields

Field	Description
Name	Name of the scoring profile.
Description	Description of the scoring profile.
CI Class	Configuration item type for which the score is generated.

Related topics

Manage scoring profiles

Add or edit a scoring profile

Create target form

Use the Create target form to create a quantitative or qualitative target for your goal.

Create target form fields

Field	Description
Name	Name of the target.
Goal	Goal that this target tracks.
Description	Description of the target.
State	The state of the target. The available options are: • **Draft** • **In Progress** • **Approved** • **Complete** • **Pending** • **Achieved** • **Not Achieved**
Progress	Percentage of target that is complete. This value is calculated automatically. If the **Type** field is set to **Maximize**, then the progress value is calculated using the following formula. `Progress = (Actual value - Base value) / (Target value - Base value) x 100` If the **Type** field is set to **Minimize**, then the progress value is calculated using the following formula.

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Create target form fields (continued)

Field	Description
	`Progress = (Actual value - Target value) / (Base value - Target value) x 100`
Status	Status to indicate the target progress. The available options are: • **Green**: Indicates that the target is on track. • **Yellow**: Indicates that the target needs improvement. • **Red**: Indicates that the target needs immediate attention.
Impact on goal	A numerical value that represents the importance of this target to its parent goal. By default, the value is **(1) Neutral**. The available options are: • **(0) No impact** • **(1) Neutral** • **(2) Moderate** • **(3) High** • **(4) Very high** • **(5) Maximum** **Note:** This field is available only when the *sn_gf.weighted_average_enabled* system property is set to **Yes**.
Owner	Owner of the target.
Contributors	Users who contribute to achieving the target.

Duration section form fields

Field	Description
Start date	Start date for the target. By default, the start date of the current quarter is populated.
End date	End date for the target. By default, the end date of the current quarter is populated.

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Metrics section form fields

Field	Description
Unit of measure	Measure type for the specified value. The available measure types are stored in the Units [sn_gf_units] table.
Base value	Base value of the target. The base value can also be considered as the present or current value.
Actual value	Actual value of the target at a given time. This field is available only when the **Type** field is set to **Maximize** or **Minimize**.
Type	Target type that shows the direction of achievement. The available options are: • **Maximize**: The direction of the progress is toward the **Target value** from the **Base value**. The base value must be less than the target value. • **Minimize**: The direction of the progress is toward the **Target value** from the **Base value**. The target value must be less than the base value.
Target value	Target value of the target. This value is the goal that your team wants to reach. This field is available only when the **Type** field is set to **Maximize** or **Minimize**.
Review frequency	Option to specify how frequently should the owner or contributor be updating the actual value of the target. The available options are: • **Daily** • **Weekly** • **Fortnightly** • **Monthly** • **Quarterly** • **Yearly**
Remark	Remark entered for business justification when updating the target.
Review date	The date on which the target is to be reviewed.

Related topics

Exploring goals

Add a quantitative target to a goal

Add a qualitative target to a goal

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Create TRM product lifecycle form

The Request TRM product lifecycle form is used to submit a request to add one or more lifecycle records to a TRM product. After you submit the request, an email notification is sent to the Enterprise Architect group for approval.

TRM product lifecycles section — software products

When you select a software product in the **Type** field of the Details tab, select **Add version and edition** to add lifecycle fields.

Note: You can add up to 5 version and edition combinations, with a maximum of 10 phases per combination.

Field	Description
Version	Version of the TRM software product. This field is required. To create a TRM software product lifecycle with a wildcard, end the version with an asterisk (*).
Edition	Edition of the TRM software product.
TRM phase	Phase of the product lifecycle. Look up and select a phase from the TRM Phases as defined in the Setup page. This field is required.
Phase start date	Start date of the product lifecycle phase. This field is required.
Phase end date	End date of the product lifecycle phase.

TRM product lifecycles section — hardware products

When you select a hardware product in the **Type** field of the Details tab, select **Add model** to add lifecycle fields. Adding lifecycle records is optional.

Note: You can add up to 5 hardware models, with a maximum of 10 phases per hardware model.

Field	Description
Hardware model	Hardware model for the lifecycle record. This field is required.
Model number	Model number of the hardware model. This field is automatically populated when you select a hardware model.
Barcode	Barcode of the hardware model. This field is automatically populated when you select a hardware model.
TRM phase	Phase of the product lifecycle. Look up and select a phase from the TRM Phases as defined in the Setup page. This field is required.
Phase start date	Start date of the product lifecycle phase. This field is required.
Phase end date	End date of the product lifecycle phase.

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Related topics

- Create TRM product lifecycles in Enterprise Architecture Workspace
- Create a TRM product in Enterprise Architecture Workspace

Create TRM product request form

Create a new request to include a new software product to the TRM library. An email notification is sent to the approver for approval. The approver belongs to the Enterprise Architect group.

TRM Product Request form fields

Field	Description
Number	A unique, auto-generated identification number for the product request.
Publisher	Publisher of the software product. Look up and select a publisher from the Companies page.
Is New Product	Option to specify if it is a new product.
Requested TRM Phase	Phase of the product. Use the following choice list: Eliminated: Invest: Maintain • Approved • Approved with Constraints • Divest • Evaluation • Unapproved
Category	Category of the product. Look up and select a category from the TRM Categories page.
Software product	Name of the software.
Short Description	Description about the product request.
Business Justification	Business justification for the product request.

Related topics

- Request a TRM product in Enterprise Architecture Workspace

Create user form

Create a user to add to a department.

Create user form fields

Field	Description
User ID	Unique identification number of the user.
First name	First name of the user.
Last name	Last name of the user.
Title	Title or job description of the user.

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Create user form fields (continued)

Field	Description
Department	Name of the department to which the user is being assigned to.
Password	Assign a password to the user. This password can be permanent or temporary.
Email	Email address of the user.
Language	The language to be used while displaying the user's system.
Notification	Specify if email notifications should be sent to this user. • Select **Enable** if an email notification should be sent to this user. • Select **Disable** if no email notification should be sent to the user.
Calendar integration	Select **Outlook** to have this user receive meeting notifications via email directly to the calendar. Otherwise, select **None**.
Time zone	Time zone in which the user is located.
Date format	Option to choose how the date details are displayed. For example, mm/dd/yyyy.
Business phone	Business phone number of the user.
Mobile phone	Personal phone number of the user.
Password needs reset	Select this check box to require the user to change the password during the first login.
Locked out	Select this check box to lock the user out of the instance and terminate all their active sessions.
Active	Select this check box to make this user active
Identity type	The category of identity associated with this user record. You can select the following: • **Human**: If the user is a person • **Machine**: If the user is a service account or automated process • **AI**: If the user is an AI-based agent
Web service access only	Select this check box to designate this user as a non-interactive user.
Internal integration user	Select this check box to designate this user as a service account.
Photo	Attach a photo of the user, if appropriate.

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Related topics

- Exploring departments
- Add a user to a department

Create value stream form

Create a new value stream to visualize the flow of a process from start to finish.

Create value stream form fields

Field	Description
Name	Name of the value stream.
Value stream category	The category with which the values stream is associated with.

Related topics

- Exploring value streams
- Add or edit a value stream

Create value stream stage form

Add a value stream stage to identify and map each activity associated with that stage of the overall value stream.

Create value stream stage form

Field	Description
Name	The name of the stage.
Value stream	The name of the value stream with which the value stream stage is associated.
Display name	This field is read-only. The display name of the value stream stage that is automatically generated from the value stream name and the value stream stage name after the record is saved. This field is read-only.
Order	The order in which this stage appears within the overall value stream.
Description	A brief description of the value stream stage. You can also elaborate or shorten the content in this field using Now Assist. For details, see Elaborate or shorten content in form fields.

Related topics

- Exploring value stream stages
- Add or edit a value stream stage

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Create value stream to process form

Add a value stream to a process to create an efficient workflow.

Create value stream to process form fields

Field	Description
Business process	The business process with which you want to associate the value stream.
Value stream	The value stream that is to be associated with the business process.
Order	The sequence of the activity within the value stream with which the business process is to be associated.
Value stream stage	The specific stage of the value stream that is to be associated with the business process.

Related topics

- Exploring value streams
- View value stream stages associated with a business process

Data Domain form

Define and manage a data domain to organize related information objects within a hierarchical structure. Data domains help categorize data discovered in database catalogs by ServiceNow Discovery. A data catalog lists all the catalog objects, or databases, discovered for an instance of a database.

Data Domain form fields

Field	Description
Name	Name of the data domain.
Description	Short description of the data domain.
Parent	Parent domain of the data domain. This is used to create a data domain hierarchy.
Leaf Node	Indicator that the data domain is at the lowest level of the hierarchy.

Related topics

- Add or edit a data domain from the Portfolio page
- Add or edit an information data domain

Data Domain form

Define and manage a data domain to organize related information objects within a hierarchical structure. Data domains help categorize data discovered in database catalogs by ServiceNow Discovery. A data catalog lists all the catalog objects, or databases, discovered for an instance of a database.

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Data Domain form fields

Field	Description
Name	Name of the data domain.
Description	Short description of the data domain.
Parent	Parent domain of the data domain. This is used to create a data domain hierarchy.
Leaf Node	Indicator that the data domain is at the lowest level of the hierarchy.

Related topics

Add or edit a data domain from the Portfolio page

Add or edit an information data domain

Data filter form

Learn about the fields of the Data filter form. Use this form to define which records need certification.

Field	Description
Table	Table from which to select target CIs or records for the policy.
Filter conditions	Use the condition builder to specify the criteria that CIs from the specified table must meet to be included as target CIs for the policy. Select **New condition set** to add a condition to the filter.
Related List Condition	Add a condition that is based on related lists that are associated with the target records for the policy.

Related topics

Create a certification policy

Demand Actions Form

Demand actions are strategic decisions that you want to execute for an application. Enterprise Architecture (formerly Application Portfolio Management) provides preconfigured actions that help you enhance the capability of the applications.

Demand Actions Form Fields

Demand Actions form

Field	Description
Action	Decision taken on the application.

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Demand Actions form (continued)

Field	Description
Description	Description of the action.
Strategy	Plan to implement the action.

Related topics

Add or edit a demand action

Demand form

Use a demand as a step to identify cost-saving opportunities on the business applications and meet your targets.

Demand form

Field	Description
Action	The course of action of the new demand.
Name	Name of the demand.
Category	Category of the demand. Use the following: • **Strategic** • **Operational**
Type	Type of demand. Use the following: • **Project** • **No Conversion**
Number	A unique, auto-generated identification number for the demand.
Start date	Start date of the demand.
Due date	Requested completion date of the demand.

Details section form fields

Field	Description
Portfolio	Portfolio indicating the business focus of the demand.
Program	Name of the program that the demand belongs to.
Demand manager	Name of the demand manager.
Collaborators	Users who can edit or contribute to the demand. A demand requester can select any user as a collaborator.

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Details section form fields (continued)

Field	Description
Department	Department in a business unit that the demand submitter belongs to. **Note:** If you don't select a department, the value defaults to the name of the department that the submitter belongs to.
Business Unit	Business unit that the demand submitter belongs to.
Impacted Business Units	The business unit that is impacted due to the submitted demand.
Business Capabilities	One or more business capabilities to associate the demand with.
Impacted Business Applications	One or more business applications to associate the demand with. You can select any business application in your enterprise, irrespective of it being related or not related to the capability that you've selected in the **Business Capabilities** field.

Related topics

Edit a demand associated with a business application

Digital integration form (easy form) in EA Workspace

The digital integration represents the integration between two business applications.

Digital integration form (easy form) fields

Field	Description
Subscriber Business Application	Name of the business application that uses the provided interface to consume, exchange, or ingest data to support a business capability. Therefore it's affected by the changes or an outage face connection or data loss. **Note:** Being a provider or subscriber business application, it doesn't refer to the data flow direction (incoming, outgoing, bidirectional). It's managed by the Data Flow Direction attribute.
Subscriber Digital Interface	Name of the digital interface that subscribes for the integration.

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Field	Description
Provider Business Application	Name of the business application that provides the digital interface and enables to consume or ingest data. Changes, ownership, and responsibilities of the interface are often connected to the provider. **Note:** Being a provider or subscriber business application, it doesn't refer to the data flow direction (incoming, outgoing, bidirectional). It's managed by the Data Flow Direction attribute.
New Provider Digital Interface	Option to create a digital interface. This field is a placeholder digital interface that is related to a provider business application.
Provider Digital Interface	Name of the digital interface. As a digital integration between two business applications or services uses a digital interface (API), you must select an interface related to the provider business application or service.
IT Owner	The owner within the IT organization who owns the digital integration. It can be the same person who owns the parent subscriber business application.
Business Owner	The owner of the business function who owns the digital integration. It can be the same person who owns the parent subscriber business application.
Digital Integration Name	Name of the digital integration. This field is auto-populated when the **Subscriber Business Application**, **Provider Business Application**, and the **Digital Interface** fields are selected. You can modify the auto-populated name.
Type	Type of the integration. Use the following options: • **Data Integration**: Use this option when the integration must mainly focus on the exchange of data such as users, groups, locations, configuration items, and departments. • **Process Integration**: Use this option when the integration is about an interaction of transactional data to support a specific process.

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Field	Description
	• **User Interface Integration**: Use this option when the integration opens a connection with another application and sends app data via a URL to query the application.
Subtype	Subtype of the integration. This field appears only when **Data Integration** is selected from the **Type** field. Use the following options: • Process configuration • Foundation data • Configuration items • Events • Reporting • Syslog
Trigger	How to trigger the integration. Use the following options: • Manual • Scheduled • Process Driven • Event
Interval	Frequency to trigger the integration. Options for the interval are as follows: • Seconds • Minutes • Hours • Days • Weeks • Months • Quarters • Years • On Demand • Real Time.
Description	Description about the digital integration. Describe why the integration is being created between two business applications or between an external service and a business application. Describe the business value it adds.

Additional fields appear after the digital integration is created. For details on the additional fields, see Digital integration form in EA Workspace.

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Related topics

Add or edit a digital integration in the EA Workspace

Digital integration form in EA Workspace

Use the digital integration form to update the digital integration between two business applications and between a business application and an external company.

Digital Integration form

Field	Description
Name	Unique and meaningful name of the digital integration.
Number	Number of the digital integration. This field is automatically generated with the DINTG prefix and can't be edited.
Provider Digital Interface	Name of the digital interface. Because a digital integration between two business applications or services uses a digital interface (API), you must select an interface related to the provider business application or service. This field is automatically generated and can't be edited.
Provider Business Application	Name of the business application that provides the digital interface and enables to consume or ingest data. Changes, ownership, and responsibilities of the interface are often connected to the provider. **Note:** Being a provider or subscriber business application doesn't refer to the data flow direction (incoming, outgoing, bidirectional). The data flow direction is managed by the Data Flow Direction attribute. This field is automatically generated and can't be edited.
Subscriber Digital Interface	Name of the digital interface that subscribes for the integration.
Subscriber Business Application	Name of the business application that uses the provided interface to consume, exchange, or ingest data to support a business capability. The subscriber business application is affected by the changes or an outage face connection or data loss. **Note:** Being a provider or subscriber business application doesn't refer to the data flow direction (incoming, outgoing, bidirectional). The data flow direction is managed by the Data Flow Direction attribute.

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Digital Integration form (continued)

Field	Description
Subscriber company	Reference to the (external) company subscribing to this integration.
Type	Type of the integration. Use the following options: • **Data Integration**: Use this option when the integration must mainly focus on the exchange of data such as users, groups, locations, configuration items, and departments. • **Process Integration**: Use this option when the integration is about an interaction of transactional data to support a specific process. • **User interface Integration**: Use this option when the integration opens a connection with another application and sends app data via a URL to query the application.
Subtype	Subtype of the integration. This field appears only when **Data Integration** is selected from the **Type** field. Use the following options: • Process configuration • Foundation data • Configuration items • Events • Reporting • Sys log
Version	Version of the integration. You can apply a practice of designing, planning, and managing changes to an Integration. You can describe the different changes and capabilities according to version in the **Description** field. This field helps Application Owners and Architects to look up which version of an integration is in use. This also helps to decide whether to change the life cycle.
Life Cycle Stage	Life cycle stage of the integration. Helps to track the life cycles for products, assets, contracts, CIs, locations, and other objects. Using the standard CSDM life-cycle values helps you to track objects through their transitions over time. Reporting can therefore

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Digital Integration form (continued)

Field	Description
	accurately reflect the actual states of CIs: usage, availability, end of support, and so on.
Life Cycle Stage Status	Life cycle stage status of the integration. The state transition of a Digital Integration guides you through the different stages of its life cycle. A life-cycle state is the combination life-cycle stage and life-cycle status of a Digital Integration during the life cycle.
Business Unit	Name of the business unit that the integration belongs to.
Description	Description of the digital integration. Explain why the integration is being created and what business value it adds.

Functional section fields

Field	Description
Data flow direction	Direction of the data flow in the integration. Use the following options: • **Outgoing: Provider to Subscriber**: Data flow from the Provider business application to the Subscriber business application. • **Incoming: Subscriber to Provider**: Data flow from the Subscriber business application to the Provider business application. • **Bidirectional: Flow of data in both directions**: Data flows in both the directions between the Provider and Subscriber business applications.
Initiating application	Name of the application, which initiates the data flow. It can be a Provider or a Subscriber business application.
Trigger	How to trigger the integration. Use the following options: • Manual • Scheduled • Process Driven • Event
Interval	Frequency to trigger the integration. Options for the interval are as follows:

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Functional section fields (continued)

Field	Description
	• Seconds • Minutes • Hours • Days • Weeks • Months • Quarters • Years • On Demand • Real Time.
Response	Type of the response received by the subscriber. Use the following options: • Synchronous • Asynchronous
Interaction type	Type of the interaction between the provider business application and the subscriber business application. Use the following options: • Guaranteed Message • Pub-Sub • Pull • Push
Middleware	Name of the middleware used in the integration.

Business Impact section fields

Field	Description
Criticality	Level of the business impact criticality. Use the following options: • Low • Medium • High • Critical
Confidentiality	Confidentiality level of the integration. Use the following options:

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Business Impact section fields (continued)

Field	Description
	• Low • Medium • High • Critical
Integrity	Integrity level of the integration. Use the following options: • Low • Medium • High • Critical
Availability	Availability of the integration. Use the following options: • Low • Medium • High • Critical

Owners section fields

Field	Description
Business owner	The owner of the business function who owns the digital integration. It can be the same person who owns the parent subscriber business application.
IT owner	The owner within the IT organization who owns the digital integration. It can be the same person who owns the parent subscriber business application.
Supported by	Name of the Subject Matter Expert (SME) or individual who provides support to the digital interface.
Support group	Name of the group that provides support to the digital interface.

Activities section fields

Field	Description
Work notes	Comments about the integration.

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Digital interface credentials form

short description.

Credentials form fields

Note: The ‘Integration user’ and ‘Connection and credential alias’ fields will be editable when the 'Platform Host' field is set to 'ServiceNow' in the related Provider Business Application of the referenced Digital interface. You require the role 'credential_admin' or 'connection_admin' to view or set the ‘Connection and credential alias’ field.

Digital Interface	Name of the digital interface. This field is auto-populated with the name of the interface that you’re editing. If you want to create the relationship to a different digital interface, use the Lookup icon to select a digital interface.
Number	Unique identifier of the digital interface credential record. This field is automatically generated and can’t be edited. The number starts with the prefix CRED. For example: CRED01001.
Digital Integration	Select a digital integration, where the digital interface is being used as a provider or subscriber digital interface.
Life cycle stage	Select the life cycle stage for the credentials. Choice list includes: • Design • Operational • End of Life
Environment	Select the environment type from the choice list.
Life cycle stage status	Select the life cycle stage status for the credentials. The choice list depends on the selection in the **Life cycle stage** field. • Design-Design • Operational-In use • End of Life-Retired
Managed by group	Select the name of the group who will manage the credentials.
Credential	Enter the name of the credentials.
Integration user	(Optional) Reference to the integration user or service account.
Authentication type	Select the authentication type from the choice list.

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Connection and credential alias	Select the connection and credential alias ID from the from the reference field.
Authorization type	Select the authorization type from the choice list.
Credential store URL	Enter the URL where the credentials are stored and can be consulted.
Description	Description about the connection between the digital interface and the documented credentials.
Notes	Enter notes about the credentials.

Related topics

Relate credentials to a digital interface

Digital interface form

Digital interfaces are provided as part of a business application, but they can also stand on their own. Interfaces provide a way for other business applications to interact with the applications.

Digital interface form fields

Field	Description
Name	Unique and meaningful name of the digital interface. Enter a descriptive name that reflects the purpose of the interface. For example, a Customer Management application might expose multiple digital interfaces, such as: • Customer Profile API — provides customer identity and profile information • Customer Order Service — supports order creation and status updates Even though all interfaces are provided by the same application, each interface represents a different interaction contract and can be consumed independently by multiple applications.
Number	Number of the digital interface. This field is automatically generated with the DINTF prefix and can't be edited.
Provider Business Application	Name of the provider business application that provides, manager, and owns the interface.

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Field	Description
	Note: This attribute can be empty if there is no business application in your repository. If you are using open interfaces such as Weather or Financial Service, you are only aware of the interface and track it without a related business application.
Provider company	Name of the provider company.
Interface Type	Type of API used by the interface. This field helps to track whether the API is Public or Open. **Note:** For Public or Open APIs, there won't be any Provider Business Application unless the Organization exposes it as an open interface. Use the following options: • Open API • Partner API • Internal API Public or Open APIs are available to anyone and can be used without any restrictions or license agreements. Internal or Private APIs are available to authorized (technical) users only and can be used without any usage restrictions and regulations. Partner APIs are available to authorized partners of an API provider. Usually, these APIs have special terms and conditions for usage.
Parent	Name of the parent interface. Often, interfaces are bundled or part of a composition. Because you can reference a digital interface on the digital integration, use the parent interface. The digital interfaces related to the parent interface are listed in the related list of the interface.
Version	Version of the interface. This field helps you to track which digital integrations are using which version of an interface.
Life Cycle Stage	Life cycle stage of the interface. Use the following options:

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Field	Description
	• Ideation • Design • Deploy • Operational • End of Life
Life Cycle Stage Status	Life cycle stage status of the interface. Each of the main life cycle stages can have one or more life cycle stage statuses. For example, a digital Interface in the operational stage might change status over time from In Use to In Maintenance to Pending Retirement. Use the following options: • Ideation: Under Evaluation, Pilot • Design: Chartered, Design, Build • Deploy: Test • Operational: In Use, In Maintenance, Pending Retirement • End of Life: Retired, Obsolete
Model ID	Model ID of the interface. This field helps you to track the interface model. This is a reference to the Application Model table where you can manage your own variants of API models or types. For example, Table API, Attachment API, Aggregate API, and Process APIs. This optional field can be used to track the interface model. Depending on your use case, you can add new models and model categories.
Description	Description of the digital interface. Provide the high-level design aspects of the interface. You can provide the details such as how the digital interface adds value, how it should be designed, and how it's intended to be used. You can also describe different changes and capabilities according to version of the interface. It helps the Application owners and Architects to decide which interface version they want to use.

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Owners section form fields

Field	Description
Business Owner	The owner of the business function, who owns the digital interface. It can be the same person who owns the parent business application.
IT Owner	The owner within the IT organization, who owns the digital interface. It can be the same person who owns the parent business application.
Supported By	Name of the Subject matter Expert (SME) or individual who provides support to the digital interface.
Support Group	Name of the group that provides support to the digital interface.

Functional section form fields

Field	Description
Protocol	Type of protocol used by the interface. API Protocols are the specifications that regulate the application. These protocols are used to integrate application programming interfaces with their software. Choices include REST, SOAP, LDAP, and so on. **Note:** This list is a non-exhaustive list and can be extended by adding your preferred values or hide the provided values.
Message Format	Format of the message in the interface. Choices include JSON, XML, CSV, and so on. **Note:** This list is a non-exhaustive list and can be extended by adding your preferred values or hide the provided values.

Authentication section form fields

Field	Description
Authentication Type	Type of authentication used to authenticate the interface. Use the following options: • Basic Auth • OpenID Connect • Certificate

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Authentication section form fields (continued)

Field	Description
	• WS-Security • LDAP • None • Other You can use the system-provided authentication types or add yours.
Authorization Type	Type of authorization used to authorize the interface. Use the following options: • OAuth 2.0 Token • JWT Web Token • SAML 2.0 Token • Other • No authorization You can use the system-provided authentication types or add yours.

Activities section form fields

Field	Description
Work notes	Comments about the interface.

Related topics

Add or edit a digital interface in the EA Workspace

Digital interface information object form

A digital interface is related to a business application, and the business application will have related information objects. You can use this relationship to get the logical data of the information object.

Digital Interface Information Object form fields

Note: The Supported CRUD Operations section helps you to define how you can interact with the information objects used, consumed or exposed by an Interface.

Field	Description
Information Object	Select the information object associated with provider business application of the digital interface. For a digital interface provided

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Field	Description
	by a company, you can select any available information object.
Digital Interface	Name of the digital interface. This field is auto-populated with the name of the interface that you're editing. If you want to create the relationship to a different digital interface, use the Lookup icon to select a digital interface.
Active From	Select the date from when the information object will be active.
Active Until	Select the date by when the information object will be inactive.
Number	Unique identifier of the digital interface information object record. This field is automatically generated and can't be edited. The number starts with the prefix DINTFIO. For example: DINTFIO01234.
Description	Description about the connection between the digital interface and the information object.

Supported CRUD Operations section fields

Field	Description
Can create the object?	Select Yes or No.
Can update the object?	Select Yes or No.
Can retrieve the object?	Select Yes or No.
Can delete the object?	Select Yes or No.

Related topics

Relate an information object to a digital interface

Digital interface SDLC component form

The SDLC components represent the artifacts or configurations that are used to implement an Interface.

Digital interface SDLC component form fields

Field	Description
Number	Unique identifier of the digital interface SDLC component record. This field is automatically generated and can't be edited. The number starts with the prefix DINTFSDLC. For example: DINTFSDLC0001005.
Digital Interface	Name of the digital interface. This field is auto-populated with the name of the interface that you're editing. If you want to create the

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Field	Description
	relationship to a different digital interface, use the Lookup icon to select a digital interface.
SDLC component	Select the SDLC component associated with provider business application of the digital interface.
Description	Description about the connection between the digital interface and the SDLC component.

Related topics

Relate an SDLC component to a digital interface

Digital interface to API form

The relationship between a digital interface and an application service API helps analysts to view which digital interface is using which API.

Digital interface to API form fields

Field	Description
Number	Number of the digital interface API. This field is automatically generated and can't be edited. The number starts with the prefix DINTFAPI. For example: DINTFAPI0001234.
Digital Interface	Name of the digital interface. This field is auto-populated with the name of the interface that you're editing. If you want to create the relationship to a different digital interface, use the Lookup icon to select a digital interface.
API	Name of the CMDB API. Select an API that you want to associate with the digital interface. You can also select the child class of the API (cmdb_ci_api). For example, Managed API (cmdb_ci_managed_api).
Description	Description about the connection between the digital interface and the API.

Related topics

Connect a digital interface with the CMDB API in the EA Workspace

Document template form

Use the document template form to create document template that can be used in the Enterprise Architecture Workspace.

Document template form

Field	Description
Name	Unique name for your template.

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Field	Description
Category	Category for the template. Search and select **Architectural Document Templates**.
Description	Type in a description for your template.
Visibility	Visibility of the template. Select one of the following options: • Public • Restricted • Private
Owner	Owner of the template.
Icon	Name of the icon used for the architectural document. Select an icon file, which appears in the window along with the template you're creating. This file appears in the header of the architectural document.
Attach image	Use this link to attach an image of the icon for the architectural document.
Is dynamic	Option to insert dynamic diagram data in the architectural document created using this template.

Edit a project form

Use application rationalization to edit details of an existing project associated with a business application.

Edit a project form

Field	Description
Project Name	The name assigned to the project.
Number	Unique identification number for the demand.
Schedule	Schedule associated with the project.
Portfolio	Portfolio that the project belongs to.
Program	Program that the project is associated with.
Calculation	The type of calculation methodology associated with the project. Use the following: • **Automatic** • **Manual**
Planned duration	Expected duration of the project in days and hours.
State	State of the project. Use the following:

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Field	Description
	• **Pending** • **Open** • **Work in Progress** • **Closed Complete** • **Closed Incomplete** • **Closed Skipped**
Project manager	Name of the project manager.
Description	Short description of the project.
Business Applications	One or more business applications to associate the project with. You can select any business application in your enterprise, irrespective of it being related or not related to the capability that you've selected in the **Business Capabilities** field.
Business Capabilities	One or more business capabilities to associate the project with.

Related topics

Edit a project associated with a business application

Edit version detail form

Add version labels, descriptions, and rollout dates to an Enterprise Modeling and Visualization diagram to improve traceability. This ensures that all stakeholders are aligned on the diagram's context and timelines.

Edit version detail form fields

Field	Description
Version label	A unique identifier assigned to each iteration of the diagram.
Version description	A summary of the diagram version that explains the purpose, scope, and changes introduced in the current scope of the diagram.
Planned rollout date	The planned date of implementation of the diagram's contents.

Related topics

Add or edit diagram version details

Exploring Enterprise Modeling and Visualization in the EA Workspace

Entity configuration form

The entity configuration form helps you to configure entities that can be used in the Enterprise Modeling and Visualization.

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Entity configuration from fields

Field	Description
Name	Name of the entity.
Entity	Table name of the entity.
Display field	Name of the field to be displayed in the Enterprise Modeling and Visualization.
Diagram action	Action name in the diagram.
Insert allowed	Select to allow creating a new entity from the diagram.
View	Name of the form view for the entity. This is the view that opens in the side panel when an entity is opened in the Enterprise Modeling and Visualization diagram. For example, the views available for a business application are Default view, Business Application view, Business Applications view, Business Application ReadOnly view. **Note:** If this field is empty, the Default view gets applied for the entity.

General information form

Learn about the fields of the General information form. Use this form to provide details for the new policy.

Field	Description
Name	Unique name for the policy.
Description	Brief description for the policy.
Worknotes	Enter notes for your future reference.
Policy type	Type of the policy. By default, this field is set to **Certification**.

Related topics

Create a certification policy

Image form

The image form helps you to create an image file in the database for a custom shape that can be used in the Enterprise Modeling and Visualization.

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Diagram action form fields

Field	Description
Active	Select the check box to allow the image to be referenced in Enterprise Modeling and Visualization.
Category	Select a category in which to organize the image file.
Name	Enter a name for the image.
Image	Select#**Click to add...** #to upload an image. Supported file types: .svg
Application	System sets this field to Global. This is a non-editable field.
Format,#Size bytes,#Height, and#Width	View current image metadata. This information is automatically populated when the image is uploaded.

Related topics

Storing shapes or images to the database

Indicator form

Application indicators are business metrics that assess the applications across dimensions such as cost, quality, technical risk, investments, user satisfaction, and business value.

Indicator form fields

Field	Description
Name	Name of the application indicator.
Category	Category that the indicator is associated with.
Short description	Short summary of the application indicator.
Direction	Business application with maximum or minimum values. Select Minimize if lower values are better. Select Maximize if higher values are better.
Result limit	The maximum number of records an indicator displays when running an associated script. This enables better performance of the Enterprise Architecture by not processing too many records.
Result Precision	Define how many decimal places are displayed for the indicator's calculated value in the scorecards and dashboards. For example, a result precision value of 0 means that the value is rounded to the nearest whole number.

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Field	Description
Unit	A number, currency, time, duration in minutes, hours, days, month, or quarter, or rate. You can also create units as per your requirements.
Automatic refresh interval	The refresh interval to update the indicator scores within the defined time range.
Order	The position of the indicator in the sequential order of all other indicators while accessing an application or capability.
Frequency	Frequency determines the interval at which the data for the indicator source should be collected. The **Frequency** field isn't available when **Performance Analytics** is selected from the **Data source** list.
Target maximum	Maximum value for the indicator. The **Target maximum** field isn't available when **Assessments** is selected from the **Data source** list.
Active	Select the **Active** option to enable the indicator.
CI Class	CI type for which the score is generated.
Target minimum	Minimum value for the indicator. The **Target minimum** field isn't available when **Assessments** is selected from the **Data source** list.
Consider Absolute Values	Option to consider values from the **Target maximum** and **Target minimum** fields. This field is available only when values are entered in the **Target maximum** and **Target minimum** fields.

Datasource Configuration section form fields

Field	Description
Data source	Defines the location from which the indicator receives data. • **Performance Analytics**: Collects scores from indicators created in Performance Analytics. See Performance Analytics indicators.

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Datasource Configuration section form fields (continued)

Field	Description
	• **Custom Script**: Allows you to write a script that collects data from another application. Beneath the **Data Source** field, a sample script appears. Customize the script as needed. • **Query Condition**: Allows you to select a table to run filters on to obtain data. • **Assessments**: Allows you to evaluate, score, and rank records by assessing records in a table. See Create metric types and generate assessable records. • **Indicators**: Allows you to add dependent child indicators. Through the child indicators, data is gathered to the parent indicator. For example, if the parent indicator is number of issues, the dependent indicators can be number of incident counts, number of problems, and changes. These dependent indicators are child indicators and the number of incidents, problems, and changes recorded are consolidated up to the parent indicator as the number of issues.
Indicator	The **Indicator** field appears when **Performance Analytics** is selected from the **Data source** list. Indicators are statistics that are used to measure current conditions and forecast trends. **Note:** If the collection frequency of the application indicator is not greater than the frequency at which the data of the Performance Analytic indicator are generated, then the system displays an error message: `Frequency of the indicator must always be greater than or equal to the frequency of the datasource configuration indicator`.
Default breakdown	Name of the Performance Analytics breakdown.
Normalization script	A script to evaluate and score business applications and capabilities using standardized metrics. It involves using indicators that provide a normalized score

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Datasource Configuration section form fields (continued)

Field	Description
	for the condition they are evaluating. These indicators can be based on assessments, query conditions, custom scripts, or performance analytics.
Consolidation	Computational method for aggregating the values, a function such as sum, average, maximum, or minimum. Default is Average. For example, Average is the sum of the monthly values divided by the total number of months in a quarter. If you select Maximum or Minimum, then it's the maximum value or the minimum value of a month in the quarter, respectively. If you select Sum, then it's an aggregate of all monthly values in the quarter.
Assessment Metric Type	Type of metric that is used to assess the indicator. **Assessment Metric Type** field appears when the **Data source** is **Assessments**.
Assessment Metric Category	Category of the metric.

Click Through section form fields

Field	Description
Click through URL navigation type	Select whether to view the application or capability indicator details in a new window, in the same window, or in a dialog box.
Click through URL script	The script associated with an indicator that allows users to select a URL and view the indicator data in a related application or dashboard. This enables quick access to relevant information, or actions related to the indicator data.

Related topics

Add or edit an application indicator

Modeling configuration form

The modeling configuration form helps you to configure UI options for Enterprise Modeling and Visualization.

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Modeling configuration form fields

Field	Description
Name	Name of the configuration.
Active	Select to enable the configuration.
Description	Enter description for the configuration.
Roles	Select roles to provide access to the configuration.
Users	Select individual users to provide access to the configuration.
Groups	Select groups to provide access to the configuration.

Options form

The options that appear depends on whether they are relevant to the selected policy type. Therefore, some of the following options don't appear on your form.

Field	Description
Display fields	One or more fields that appear in list views in Data Certification tasks, that uniquely identify the records that require certification. The selected fields can't overlap fields in **Certification fields**.
Certification fields	One or more fields whose value requires verification and certification. The selected fields can't overlap fields in **Display fields**.
Allow field updates	Option to allow certification task reviewers to update field values while reviewing CIs. • When selected, certification task reviewers can update field values in order to certify a CI. • When clear, certification task reviewer can't update field values, and therefore reject CIs that aren't compliant.
Allow empty field values	Option to allow users to certify CIs with empty attributes:

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Field	Description
	• When selected, certification task reviewers can certify or fail certification of a CI with an empty attribute. • When clear, certification task reviewers can fail certification of a CI with an empty attribute but aren't able to certify that CI.
Days to complete	Maximum number of days that policy tasks must be completed by. If notifications are enabled for certification or attestation tasks, then this number is used to calculate the milestones for sending notifications. The full time (100%) interval starts when a task is created and ends when the number of days to complete the task arrives. Notifications are sent if a task isn't closed when 50%, 70%, and 90% of that interval passes.
Instructions	Any instructions to assigned users, to help them complete the tasks.

Relationship configuration form

The entity configuration form helps you to configure entities that can be used in the Enterprise Modeling and Visualization.

Relationship form fields

Field	Description
Relationship Type	Select the type of relationship. The choice list include: • Reference • M2M table • API • CI Relationship
Base Entity	Select the base entity for the relationship.
Base Reference	Define the base reference.
Related Entity	Select a related entity.
Related Reference	Define the related reference.
Base Entity Configuration	Select the base entity configuration for the relationship.

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Base Entity Conditions section fields

Field	Description
Set conditions	Use the link to set base entity conditions using the field, operator, and value filters.

Related Entity Conditions section fields

Field	Description
Set conditions	Use the link to set related entity conditions using the field, operator, and value filters.
M2M Table	Select the M2M table type.

M2M Entity Conditions section fields

Field	Description
Set conditions	Use the link to set M2M entity conditions using the field, operator, and value filters.

Request TRM product form

The Request TRM product form is used to submit a request to add a new software or hardware product to the Technology Reference Model (TRM) library. Optionally, add lifecycle records as part of the same request.

Details tab

Field	Description
Number	Unique, auto-generated identification number for the product request.
Approval	Status of the approval. The available values include: • Not yet requested • Requested • Approved • Rejected
Short description	Brief description of the product request.
Company	Company of the software or hardware product. Look up and select a company name from the list. This field is required.
Category	Category of the product. Look up and select a category from the TRM Categories page.
Type	Type of the product. The list includes: • Software • Hardware

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Field	Description
	The **Type** selection determines which product and lifecycle fields are displayed on the form.
Other categories	Additional level of category classification of the TRM product. You can also filter for TRM products by using the values of this field. You can select multiple other category values. **Note:** This field is enabled only after a value is selected in the **Category** field.
New product	Select this check box if the product does not yet exist in the system. When selected, the **Software product** field is replaced by the **Name** field for entering the new product name.
Requested TRM phase	Phase of the product. Look up and select a phase from the TRM Phases page. This field is required.
Software product	Name of the software product. This field appears and is required when **Software** is selected in the **Type** field and the **New product** check box is not selected. This field is available when the Basic Software Asset Management plugin is installed on your instance.
Name	Name of the new software product. This field appears and is required when **Software** is selected in the **Type** field and the **New product** check box is selected. This field replaces the **Software product** field.
Operating system	Operating system on which the TRM product can be deployed. This field appears only when **Software** is selected in the **Type** field.
Hardware product	Name of the hardware product. This field appears and is required when **Hardware** is selected in the **Type** field. This field is available when the Hardware Asset Management plugin is installed on your instance.
Owner	User responsible for the TRM product. Defaults to the logged-in user.
Business Justification	Business justification for the product request.

TRM product lifecycles tab

Use this tab to optionally add one or more lifecycle records as part of the product request. For field information, see Request TRM product lifecycle form.

Note: The **Create lifecycle** button is enabled only after all the mandatory fields on the **TRM product lifecycles** tab are filled in.

Related topics

- Request a TRM product in Enterprise Architecture Workspace
- Request a TRM product lifecycle in Enterprise Architecture Workspace
- Create a TRM product in Enterprise Architecture Workspace
- Create TRM product lifecycles in Enterprise Architecture Workspace
- Approve or reject TRM requests

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Request TRM product lifecycle form

The Request TRM product lifecycle form is used to submit a request to add one or more lifecycle records to a TRM product. After you submit the request, an email notification is sent to the Enterprise Architect group for approval.

Parent lifecycle request fields

The top of the form captures the parent lifecycle request record. After you enter the details, the child lifecycle records you add in the **TRM product lifecycles** section below are created and linked to this parent request.

Field	Description
Number	A unique, auto-generated identification number for the parent lifecycle request.
Approval	Status of the approval. Choices include: • Not yet requested • Requested • Approved • Rejected
Short description	A brief description of the parent lifecycle request.
Business Justification	Business justification for the parent lifecycle request.
TRM product	Name of the existing TRM product to add lifecycles to. Look up and select the product from the TRM Products page. This field is required. The fields in the **TRM product lifecycles** section below change based on whether the selected product is a software or hardware product.
Business Application	Name of the business application. Look up and select a business application to associate it with the TRM product lifecycle.

TRM product lifecycles section — software products

When you select a software product in the **Type** field of the Details tab, select **Add version and edition** to add lifecycle fields.

Note: You can add up to 5 version and edition combinations, with a maximum of 10 phases per combination.

Field	Description
Version	The version of the TRM software product. This field is required. To create a TRM software product lifecycle with a wildcard, end the version with an asterisk (*).
Edition	The edition of the TRM software product.
TRM phase	Phase of the product lifecycle. Look up and select a phase from the TRM Phases as defined in the Setup page (Enterprise Architecture Workspace > Setup > TRM Phases). This field is required.

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Field	Description
Phase start date	Start date of the product lifecycle phase. This field is required.
Phase end date	End date of the product lifecycle phase.

TRM product lifecycles section — hardware products

When you select a hardware product in the **Type** field of the Details tab, select **Add model** to add lifecycle fields. Adding lifecycle records is optional.

Note: You can add up to 5 hardware models, with a maximum of 10 phases per hardware model.

Field	Description
Hardware model	The hardware model for the lifecycle record. This field is required.
Model number	The model number of the hardware model. This field is automatically populated when you select a hardware model.
Barcode	The barcode of the hardware model. This field is automatically populated when you select a hardware model.
TRM phase	Phase of the product lifecycle. Look up and select a phase from the TRM Phases as defined in the Setup page (Enterprise Architecture Workspace > Setup > TRM Phases). This field is required.
Phase start date	Start date of the product lifecycle phase. This field is required.
Phase end date	End date of the product lifecycle phase.

Related topics

- Create TRM product lifecycles in Enterprise Architecture Workspace
- Request a TRM product lifecycle in Enterprise Architecture Workspace

Request TRM Product form the Service Catalog form

The Request TRM Product form is used to submit a request for adding a new software or hardware product to the Technology Reference Model (TRM) library from the service catalog. Optionally, include one or more lifecycle records with the request.

Request TRM Product form fields

Field	Description
Short description	Brief description of the product request.
Company	Company of the software or hardware product. Look up and select a company from the list.

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Field	Description
Category	Category of the product. Look up and select a category from the TRM Categories page.
Other categories	Additional level of category classification of the TRM product. This field is enabled only after a value is selected in the **Category** field.
Type	The type of the product. Select **Software** or **Hardware**. The fields displayed in the form change based on the type selected. **Note:** The fields **New Product**, **Software Product**, and **Hardware Product** are displayed only when you have the Basic Software Asset Management and the Hardware Asset Management plugins installed on your instance.
New Product	Select this check box if the product does not yet exist in the system. When selected, the **Software Product** or **Hardware Product** field is replaced by the **Name** field.
Software Product	Name of the software product. This field appears and is required when **Software** is selected in the **Type** field and the **Is New Product** check box is not selected. This field is available when Basic Software Asset Management is installed on your instance.
Operating System	Operating system on which the product can be deployed. This field appears only when **Software** is selected in the **Type** field.
Hardware Product	Name of the hardware product. This field appears and is required when **Hardware** is selected in the **Type** field and the **New Product** check box is not selected. This field is available when the Hardware Asset Management plugin is installed on your instance.
Name	Name of the new software or hardware product. This field appears when the **New Product** check box is selected. This field replaces the **Software Product** or **Hardware Product** field.
Requested TRM Phase	Phase of the product. Look up and select a phase from the TRM Phases page. This field is required.
Owner	User responsible for the TRM product. Defaults to the logged-in user.
Business Justification	Business justification for the product request.

TRM product lifecycles tab

Use this tab to optionally add one or more lifecycle records as part of the product request. For field information, see Request TRM product lifecycle form.

Related topics

- Request a TRM product from the service catalog
- Request a TRM product lifecycle from the service catalog
- Request TRM Product Lifecycle form
- Request a TRM product in Enterprise Architecture Workspace
- Request a TRM product lifecycle in Enterprise Architecture Workspace
- Create a TRM product in Enterprise Architecture Workspace
- Create TRM product lifecycles in Enterprise Architecture Workspace

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Request TRM Product Lifecycle form

The Request TRM Product Lifecycle form is used to submit a request from the service catalog to add one or more lifecycle records to an existing TRM product.

TRM Product Lifecycle Request form fields

Field	Description
Short description	Brief description of the product lifecycle request.
Business Justification	Business justification for the product lifecycle request.
TRM Product	Name of the TRM product to add lifecycles to. Look up and select the product from the TRM Products page. This field is required.
Business Application	Name of the business application. Look up and select a business application to associate it with the TRM product lifecycle.

TRM product lifecycles section — software products

The **TRM product lifecycles** section appears after you select a TRM software product in the **TRM Product** field. Select **Add** to open the **Add Row** dialog and add a lifecycle record.

Field	Description
Version	Version of the software product. This field is required. To use a wildcard, end the version with an asterisk (*).
Edition	Edition of the software product.
TRM phase	Phase of the product lifecycle. Look up and select a phase from the TRM Phases page. This field is required.
Phase start date	Start date of the product lifecycle phase. This field is required.
Phase end date	End date of the product lifecycle phase.

TRM product lifecycles section — hardware products

The **TRM product lifecycles** section appears after you select a TRM hardware product in the **TRM Product** field. Select **Add** to open the **Add Row** dialog and add a lifecycle record.

Field	Description
Hardware Model	Hardware model for the lifecycle record. This field is required.
Model number	Model number of the hardware model. This field is automatically populated when you select a hardware model.
Barcode	Barcode of the hardware model. This field is automatically populated when you select a hardware model.

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Field	Description
TRM Phase	Phase of the product lifecycle. Look up and select a phase from the TRM Phases page. This field is required.
Phase start	Start date of the product lifecycle phase. This field is required.
Phase end	End date of the product lifecycle phase.

Related topics

- Request a TRM product lifecycle from the service catalog
- Request a TRM product from the service catalog
- Request TRM Product form the Service Catalog form

Schedule form

Learn about the fields of the Schedule form. Use this form to define the timing and frequency for executing the certification task.

Field	Description
Schedule	Recurring schedule for how often and when to run the task. The **On demand** option doesn't set any recurring schedule for running the policy. Your setting determines which other fields appear on the form.
Start time	Time in the day to start running the policy.
Day of the week	Day of the week to run the policy.
On	Day of the month to run the policy.
Start day and time	Date and time of first run of the policy.

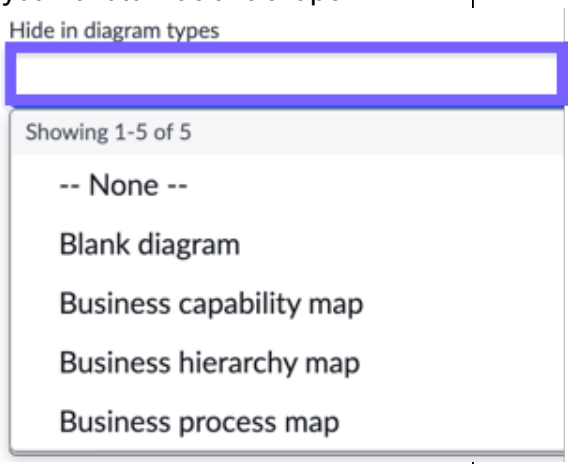
Shape library element form

Associate a shape element and its diagram action to a shape library so that the shape is available in the Enterprise Modeling and Visualization.

Shape Library Element form fields

Field	Description
Tool Tip	Hower text to be displayed on the image or shape.
Diagram Action	Select the diagram action that you have created to associate it with this shape element.
Now Icon	Enter name of the icon or image with its extension details.

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Field	Description
Application	Name of the application that the shape library is associated with. This is field is auto-populated as Global and can't be edited.
Shape library	Select the shape library that you want to associate with this shape.
Domain	Name of the domain. Use the look up icon to select a domain name.
Name	Enter a name for the shape to be displayed in the Enterprise Modeling and Visualization.
Entity configuration	(Optional) Select an entity if you want to associate this shape with an existing entity. This configuration associates the shape with the entity table in the database.
Hide in diagram types	(Optional) Select type of diagrams for which you want to hide this shape element. 
Metadata	Enter the metadata to fill color to the shape. Example metadata: `{"style":{ "fillColour":"#F6EC60" }}`
Order	Enter a number to define the order of the shape element in the shape library.

Related topics

- Add a shape library element
- Add a shape library element for a custom shape
- Storing shapes or images to the database
- Create a diagram action for a custom shape
- Add a custom shape library

Shape library form

You can add new shapes to the shapes library as per your requirement. Use these shapes to create the diagrams in Enterprise Modeling and Visualization.

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Shape library form fields

Field	Description
Name	Enter a name for the shape library.
Application	Name of the application that the shape library is associated with. This field is auto-populated as Global and can't be edited.
Active	Select the check box to show the shape library in the Enterprise Architecture Workspace.
Domain	Name of the domain. Use the look up icon to select a domain name.

Share architectural artifacts form

Share architectural artifacts with users and group and assign them relevant access permissions.

Share architectural artifact form fields

Field	Description
Members or groups	Select the users or groups that you want to share the architectural artifact with and grant access permissions to. You can select multiple users and groups.
Access	The access level that you want to provide to the selected users or groups. • If you’re the owner of the architectural artifact, you can provide **Viewer**, **Editor**, and **Owner** permission to other users or groups. • If you’re assigned the **Editor** role permission to an architectural artifact, you can provide **Editor** or **Viewer** permission to other users or groups. • If you’re assigned the **Viewer** role permission to an architectural artifact, you can’t provide any permission to other users or groups.
Message	Enter the reason for inviting the recipient to collaborate on this architectural artifact. You should include clear and concise information to help the recipient understand the purpose and context of the invitation.
Manage access	Select **Manage access** to view the existing collaborators on the architectural artifact and their access permissions. You can change the existing access permissions, according to your requirement.

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Related topics

- Share an architectural artifact with users or groups
- Manage access to architectural artifacts

TRM technical debt form

Create Technology Reference Model (TRM) technical debts for products that aren't aligned with TRM phases and standards.

Technical Debt form fields

Field	Description
Number	Unique identifier of the technical debt record. Select this value to open the technical debt record. **Note:** If you upgraded to *Enterprise Architecture Workspace* version 10.1.3, technical debt records created before the upgrade display **(empty)** in this field. Select **(empty)** to open these records. Records created after the upgrade have a number.
Reason	Reason why the technical debt was created.
Business Application	Business application associated with the TRM product.
State	State of the technical debt record: Active, Resolved, or Archived. For details on how the record moves between states, see TRM technical debt states and transitions.
TRM product	Software product that has version-specific life cycles.
TRM phase	Phase of the TRM product. The following TRM phases are available: • Approved: The technology is approved for use. • Approved with Constraints: The technology can be used within the constraints specified in the comments. • Divest: A decision was taken to divest from the use of the technology. • Evaluation: This technology is being evaluated and can't be used for production purposes. • Unapproved: The technology is not permitted to be used. **Note:** You can modify these phases by navigating to **EA Workspace** > **Setup** > **TRM Phases**.
Software product	Software product related to the TRM product.
Version	Version of the software product. The software product model name usually contains this version.
Edition	Edition of the software product. Populated only when the technical debt is created from a TRM product lifecycle that matches on version and edition.

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Technical Debt form fields (continued)

Field	Description
Software product model	Software product model related to the TRM product.
Operating system	Operating system on which the TRM product can be deployed. This field appears only when **Software** is selected in the **Type** field.
Last run	Timestamp when the *Populate TRM technical debts in the EA Workspace* scheduled job last ran to update the table with technical debt.
Server	Server related to the TRM product. **Note:** This field is available starting with Technology Lifecycle Management (TLM) plugin version 1.7.1.
TRM level	Level (Product or Product Lifecycle) at which the technical debt is created.

Related lists

The **Discovered Technology** related list shows the TLM discovered technology records that this technical debt was created from.

Use this related list as your starting point to investigate and remediate the technical debt. Open a discovered technology record from the list. Use its **Number** field to open the full TPM Discovered Technology record, or its **TLM technology lifecycle** field to open the associated technology lifecycle record. From there, you can identify and update the underlying TRM product or TRM product lifecycle that's causing the debt.

Related topics

- View Technology Reference Model technical debts
- TRM technical debt
- TRM technical debt states and transitions
- Governing TRM product fields

Technology portfolio audit form

You can use the Technology portfolio audit table to view audit information for your applications.

Important:

Technology Lifecycle Management (TLM) was previously known as Technology Portfolio Management (TPM). TPM and TLM refer to the same feature. Table names and scheduled job names continue to use TPM and haven't been renamed.

Whether your instance displays TPM or TLM also depends on your application versions. TLM labels appear only when both the Enterprise Architecture Workspace application (version 9.2.1 or later) and the Technology Lifecycle Management plugin, sn_apm_tpm (version 1.11.0 or later), are installed. If either application is on an earlier version, the interface continues to show TPM.

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Technology portfolio audit table

Column name	Description
Type	Application type. Choices are: • Software • Hardware
Software product	Name of the software product.
Product version	Version number of the product.
Product edition	Edition of the product. For example, Standard.
Product full version	Full version of the product.
Product model	Hardware model that is associated with the software product.
Verification status	Verification status of the product. Choices are: • Need to verify • Verified • Rejected
Comments	Customer comments.
Lifecycle phase	Lifecycle phase of the product.
Phase start date	Lifecycle phase start date.
Version	Version of the lifecycle.
Edition	Edition of the lifecycle.
Full version	Full version of the lifecycle.
Match notes	Notes by the customer.
Technology lifecycle	TPM technology lifecycle information of the software product or hardware model.

Related topics

Working with technology portfolio audit details

Total cost of ownership form

Application TCO helps enterprise architects to evaluate the cost of business applications and prioritize application portfolio.

Total cost of ownership form

Field	Description
Business application	Name of the business application for which you are creating the total cost of ownership.
Cost type	Cost type used in the TCO calculation.

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Field	Description
Cost	Select the currency type and enter the cost of the business application.
Fiscal period	Select the fiscal period to calculate the total cost of ownership.
Billing date	Select a date for the billing.
Reference	Enter reference details.
Vendor	Select the vendor of the business application.
Source	Select the source of the TCO.
Source cost type	Select the cost type as defined in the source of the TCO. This field is editable only when a source is selected in the **Source** field.
Short description	Description of the TCO.

Related topics

Add or edit a total cost of ownership record

TRM Category form

Add a new request or edit an existing request to create a TRM category.

TRM Category form fields

Field	Description
Name	A unique name of the category.
Description	Description about the TRM category.
Reference Code	Reference code for the category. The reference code is used to keep reference to other authoritative data source, such as the federal TRM.
Parent Category	Select a parent category to add the category to a hierarchical structure. Look up and select a category from the TRM Categories page.
Owner	Owner of the TRM category, responsible for maintaining consistent technology compliance standards for that TRM category.

Related topics

Manage TRM categories

Add or edit a TRM category

TRM Phase form

Define your own TRM phase or edit an existing TRM phase.

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TRM Phase form fields

Field	Description
Name	Name of the phase.
Description	Description about the phase.
Production Approved	Option to mark as approved for production or not.
Color	Color that defines the TRM phase. Select a color from the drop-down list.
Shape	Shape that defines the TRM phase. Select a shape from the drop-down list.

Related topics

Add or edit a TRM phase

ServiceNow Otto for Enterprise Architecture (EA)

Use ServiceNow Otto for Enterprise Architecture (EA) to use generative AI skills in the Enterprise Architecture Workspace. These skills help you summarize and refine content, generate and compare diagrams, gather insights into business applications, and query your enterprise architecture portfolio using natural language.

Get started

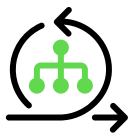
The ServiceNow AI Platform now brings you a new AI experience with three licensing tiers available:

- Foundation: AI basics to deliver insights
- Advanced: AI to boost productivity across relevant use cases
- Prime: Act autonomously with all AI assets, and create your own

For more information, see ServiceNow product tiers.

Explore	Configure	Use AI agents
Learn more about ServiceNow Otto for EA	Configure ServiceNow Otto for EA to get started	Use the AI agent use cases in ServiceNow Otto for EA

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Use  Use the AI capabilities offered by Enterprise Architecture (EA)		

Important:

- Not all model providers are available for customers with in-country SKUs, and some AI products/features are currently unavailable for in-country customers. For more information, see the KB1584492 article in the Now Support Knowledge Base. Be sure to check for model provider availability updates in future releases.
- Some AI products/features are currently unavailable for customers in the FedRAMP, NSC DOD IL5, or Australia IRAP-Protected data centers, self-hosted customers, or in other restricted environments. For more information, see the KB0743854 article in the Now Support Knowledge Base. Be sure to check for availability updates in future releases.
- Some AI products/features are currently available only for customers in some regions. Be sure to check for availability updates in future releases.
- Some AI products and skills are not available in Regulated Markets. For more information, see KB2593939: Regulated Markets AI Products/Skills Not Available. Be sure to check for availability updates in future releases.

Troubleshoot and get help

- Search the Known Error Portal for known error articles
- Contact Customer Service and Support

AI limitations

This application uses artificial intelligence (AI) and machine learning, which are rapidly evolving fields of study that generate predictions based on patterns in data. As a result, this application may not always produce accurate, complete, or appropriate information. Furthermore, there is no guarantee that this application has been fully trained or tested for your use case. To mitigate these issues, it is your responsibility to test and evaluate your use of this application for accuracy, harm, and appropriateness for your use case, employ human oversight of output, and refrain from relying solely on AI-generated outputs for decision-making purposes. This is especially important if you choose to deploy this application in areas with consequential impacts such as healthcare, finance, legal, employment, security, or infrastructure. You agree to abide by ServiceNow's AI Acceptable Use Policy, which may be updated by ServiceNow.

Data processing

This application requires data to be transferred from ServiceNow customers' individual instances to a centralized ServiceNow environment, which may be located in a different data center region from the one where your instance is, and potentially to a third-party cloud provider, such as Microsoft Azure. This data is handled per ServiceNow's internal policies and procedures, including our policies available through our CORE Compliance Portal.

Data collection

ServiceNow collects and uses the inputs, outputs, and edits to outputs of this application to develop and improve ServiceNow technologies including ServiceNow models and AI products. In addition, this application will collect incident data (for Incident Assist and Knowledge Assist) and chat transcripts (for Chat Assist). Customers can opt out of future data collection at any time, as described in the Now Assist Opt-Out page.

For more information, see the Now Assist documentation.

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Exploring ServiceNow Otto for Enterprise Architecture (EA)

With the ServiceNow Otto for EA features, you can use generative AI skills to summarize and refine content, generate and compare diagrams, gather insights into business applications, and query your enterprise architecture portfolio using natural language in the Enterprise Architecture Workspace.

ServiceNow Otto for Enterprise Architecture (EA) overview

ServiceNow Otto for EA includes generative AI skills and features that enable Enterprise Architecture Workspace users to work more efficiently with their enterprise architecture data.

Note: Depending on your license, you will have access to certain application features, generative AI skills, agentic workflows, and AI agents. For more information, see ServiceNow product tiers.

Skills

ServiceNow Otto for Enterprise Architecture (EA) includes the following generative AI skills.

Architectural Decision Record (ADR) summarization

Generate a concise summary of an Architectural Decision Record (ADR) artifact using ServiceNow Otto for EA. You can also shorten or elaborate selected text in the ADR document using the context menu, and insert the generated content directly into the record.

Business application insights

Generate concise and actionable insights for business applications, including details about purpose, risk, cost, and rationalization recommendations. Insights are context-aware and automatically include relevant information from the page where you initiate them.

Compare Enterprise Modeling and Visualization diagrams

Compare any two versions of an Enterprise Modeling and Visualization diagram and get an AI-generated summary of the differences, including an executive summary and a breakdown of shapes and relationships that were added, modified, or removed.

Elaborate or shorten content in form fields

Elaborate or shorten text in the description or reasoning fields on forms for business applications, business capabilities, business processes, value stream stages, and information objects. You can also use prompts to generate content for the **Reasoning** field in the **Planned Disposition** section of a business application form.

Create diagram from image

Generate an editable business process map diagram from an uploaded image. ServiceNow Otto for EA identifies shapes, pools, lanes, and connections from the image and creates the diagram in the Enterprise Architecture Workspace.

Enterprise Architecture query agent

Ask natural language questions about your enterprise architecture portfolio and get AI-generated answers grounded in your instance data. The agent queries across business applications, capabilities, value streams, technology standards, and information objects.

Generate enterprise architecture diagram

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Use the Generate enterprise architecture diagram agentic workflow to create Enterprise Modeling and Visualization diagrams for business applications hierarchy through a conversation with an AI agent in the ServiceNow Otto panel.

Dashboard insights

Use a conversational interface to query and analyze data from Enterprise Architecture Workspace dashboard widgets. Ask natural language questions to retrieve insights, identify trends, and generate charts without manually reviewing dashboard visualizations.

Register a business application conversationally

Use a conversational experience in Virtual Agent to register a business application by answering a series of guided questions. The virtual agent maps your responses to the appropriate form fields automatically.

Register a digital integration conversationally

Use a conversational experience in Virtual Agent to register a digital integration by answering a series of guided questions.

You can use Now LLM Service, Azure OpenAI, Google Gemini or Anthropic Claude on AWS as the AI model provider for all generative AI skills and AI agents. Use the Configuration Controls in AI Control Tower to define which options are available, then set the skill-level preferences in the AI Admin Hub console. For more information, see Large language models on the ServiceNow AI Platform.

Note: Starting with the September 2026 release, Gemma 4 joins our growing portfolio of open-weight models available through Now LLM Service. The latest industry advancements are available alongside sovereignty-focused options. All models are hosted and governed by ServiceNow with the same infrastructure and data protections. Older models will remain available for existing published AI skills, agents, and agentic workflows, but will no longer be available for new development or configuration. For details, see the KB3066214: ServiceNow Otto Model Upgrades article in the Now Support Knowledge Base.

Related topics

- Configure ServiceNow Otto for Enterprise Architecture (EA)
- Generate a summary for Architectural Decision Records (ADRs)
- Generate insights into business applications
- Compare Enterprise Modeling and Visualization diagrams
- Elaborate or shorten content in form fields
- Create a business process map diagram from an image
- Exploring Enterprise Architecture query agent
- Enterprise Architecture AI agent diagramming agentic workflow
- Generate insights for Enterprise Architecture Workspace dashboard widgets
- Register a business application conversationally
- Register a digital integration conversationally
- ServiceNow Otto for Enterprise Architecture (EA) access roles
- Configure AI Data Explorer and Query Generation skills
- Enable Knowledge Graph system properties for the Enterprise Architecture query agent
- Explore

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- Working with AI agent agentic workflow in ServiceNow Otto for Enterprise Architecture (EA)
- Enterprise Architecture AI agent diagramming agentic workflow

Supporting information for ServiceNow Otto for Enterprise Architecture (EA)

Get a quick overview of the important information that is related to the ServiceNow Otto for Enterprise Architecture (EA) application.

Supported versions

The ServiceNow Otto for EA application is supported starting with the Yokohama release.

Supported user interfaces

The ServiceNow Otto for EA application is supported for the Enterprise Architecture Workspace.

Application information

Activate the latest ServiceNow Otto for Enterprise Architecture (EA) (sn_ea_gen_ai) store app to use the ServiceNow Otto skills.

This store app has the dependency on ServiceNow Otto for Platform (sn_genai_platform) (v6.0.0).

For more information, see Configure ServiceNow Otto for Enterprise Architecture (EA).

Related topics

- Exploring ServiceNow Otto for Enterprise Architecture (EA)
- Configure ServiceNow Otto for Enterprise Architecture (EA)
- Using ServiceNow Otto for Enterprise Architecture (EA)

Using ServiceNow Otto for Enterprise Architecture (EA)

With the ServiceNow Otto for Enterprise Architecture (EA) application, you can use generative AI skills to summarize and refine content, generate and compare diagrams, and gather insights into business applications. You can also query your enterprise architecture portfolio using natural language in the Enterprise Architecture Workspace.

You can use Now LLM Service, Azure OpenAI, Google Gemini or Anthropic Claude on AWS as the AI model provider for all generative AI skills and AI agents. Use the Configuration Controls in AI Control Tower to define which options are available, then set the skill-level preferences in the AI Admin Hub console. For more information, see Large language models on the ServiceNow AI Platform.

Note: Starting with the September 2026 release, Gemma 4 joins our growing portfolio of open-weight models available through Now LLM Service. The latest industry advancements are available alongside sovereignty-focused options. All models are hosted and governed by ServiceNow with the same infrastructure and data protections. Older models will remain available for existing published AI skills, agents, and agentic workflows, but will no longer be available for new development or configuration. For details, see the KB3066214: ServiceNow Otto Model Upgrades article in the Now Support Knowledge Base.

Note: Depending on your license, you will have access to certain application features, generative AI skills, agentic workflows, and AI agents. For more information, see ServiceNow product tiers.

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Related topics

- Configure ServiceNow Otto for Enterprise Architecture (EA)
- Generate a summary for Architectural Decision Records (ADRs)
- Generate insights into business applications
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- Register a digital integration conversationally
- Working with AI agent agentic workflow in ServiceNow Otto for Enterprise Architecture (EA)
- Enterprise Architecture AI agent diagramming agentic workflow

ServiceNow Otto for Enterprise Architecture reference

Reference information to provide additional information about tables, roles, and properties installed with ServiceNow Otto for Enterprise Architecture (EA).

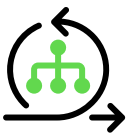
MCP for Enterprise Architecture

MCP for Enterprise Architecture connects any MCP-compatible AI assistant to your ServiceNow® instance. Enterprise architects, application portfolio managers, and technology portfolio managers can query business applications, capabilities, technology products, and architectural relationships using natural language prompts.

Get started

Explore	Configure	Integrate
		
Learn about MCP for EA features	Learn how to configure MCP for EA	Connect the MCP for EA to an AI assistant

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Use	Reference	
 Access EA data using MCP tools	 Get details about components like tables, roles, and tools	

Explore

MCP for Enterprise Architecture provides enterprise architects and application portfolio managers direct access to business application insights, capability mappings, architectural relationships, and rationalization data in their AI client. Opening the ServiceNow instance is not required.

MCP for Enterprise Architecture overview

The Enterprise Architecture (EA) Model Context Protocol (MCP) server connects an AI assistant such as Claude to your ServiceNow instance. Ask natural language questions to retrieve business application data, capability mappings, architectural relationships, and rationalization insights — without navigating through tabs and reports.

MCP for Enterprise Architecture personas

Personas

Persona	Description
Enterprise architect	Queries architectural relationships, reviews diagram comparisons, and retrieves business application insights to support roadmap and rationalization decisions.
Application portfolio manager	Accesses business application data, capability mappings, and rationalization scores to prioritize investment and plan modernization initiatives.

Available tools

Access Enterprise Architecture data and Now Assist AI skills as MCP tools, enabling LLM (large language model) agents to query and process business applications, capabilities, architectural relationships, and diagrams.

The tools installed with the application are annotated as read-only. They retrieve or analyze EA data but don't create, update, or delete records in your instance. For details about tool annotations, see Components installed with MCP for Enterprise Architecture. For the parameters that each tool accepts, see MCP for Enterprise Architecture tool parameters.

The following tools are available:

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MCP for Enterprise Architecture tools

Tool name [ID]	Description
App Rationalization Query (sn_ea_mcp_server.ea.app_rationalization_query)	Retrieves and scores business applications based on rationalization criteria, supporting portfolio investment and modernization decisions.
Capability Hierarchy App Resolver (sn_ea_mcp_server.ea.capability_hierarchy_resolver)	Resolves business capability-to-application mappings by traversing the capability hierarchy, identifying which applications support each capability at every level.
Related Entities Resolver (sn_ea_mcp_server.ea.related_entities_resolver)	Retrieves entities related to a specified business application or architectural element, identifying dependencies and relationships across the EA data model. Also traces multi-level impact and dependency chains from a single configuration item, for example, the business capabilities affected if a database fails.
Get EA Business App Insights (sn_ea_mcp_server.ea.get_ea_business_app_insights)	Generates Now Assist AI-powered insights for a business application, including health scores, rationalization signals, and strategic recommendations.
Enterprise Graph (sn_mcp_server.enterprise_graph)	Queries the EA knowledge graph to answer natural language questions about architectural relationships, business capabilities, and technology product connections across the enterprise. Enterprise Graph is a platform tool that's associated with the EA MCP server, rather than installed with the application.
Diagram change analysis (sn_ea_mcp_server.diagram_change_analysis)	Compares two versions of an EA diagram and summarizes the architectural changes between them. Can also summarize a single diagram version. Available only when the Enterprise Modeling and Visualization plugin is installed.
Artifact Resolver (sn_ea_mcp_server.ea.artifact_resolver)	Identifies the architectural artifacts, such as documents and diagrams, that are linked to an EA entity, and the entities that a given artifact documents.

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Related topics

To learn more about configuring and using MCP for Enterprise Architecture, see the following topics.

- Configure MCP for Enterprise Architecture
- Use
- MCP for Enterprise Architecture reference

Related topics

Exploring ServiceNow Otto for Enterprise Architecture (EA)

Exploring Enterprise Architecture query agent

Enterprise Architecture Workspace access roles

Configure MCP for Enterprise Architecture

The EA MCP server connects your ServiceNow instance to an MCP-compatible AI assistant, enabling natural language access to EA data. To set up the connection, install the application and configure the server.

Configuration overview

1. Install MCP for Enterprise Architecture
2. Connect the EA MCP server to an AI assistant

Install MCP for Enterprise Architecture

You can install the MCP for Enterprise Architecture application (sn_ea_mcp_server) if you have the admin role.

Before you begin

- Review the MCP for Enterprise Architecture application listing in the ServiceNow Store for information on dependencies, and release compatibility. Check your entitlements to determine whether you have access to this application.
- The application requires the MCP Server plugin (com.sn_mcp_server) and the ServiceNow Otto for Enterprise Architecture (EA) plugin (com.sn.ea.gen.ai).

Role required: admin

Procedure

1. Install the MCP for Enterprise Architecture application from the ServiceNow Store .
2. Activate the MCP for Enterprise Architecture server.

   Navigate to **All** > **MCP Server Console** and enable the MCP for Enterprise Architecture server before connecting it to an AI assistant.

Related topics

Configure ServiceNow Otto for Enterprise Architecture (EA)

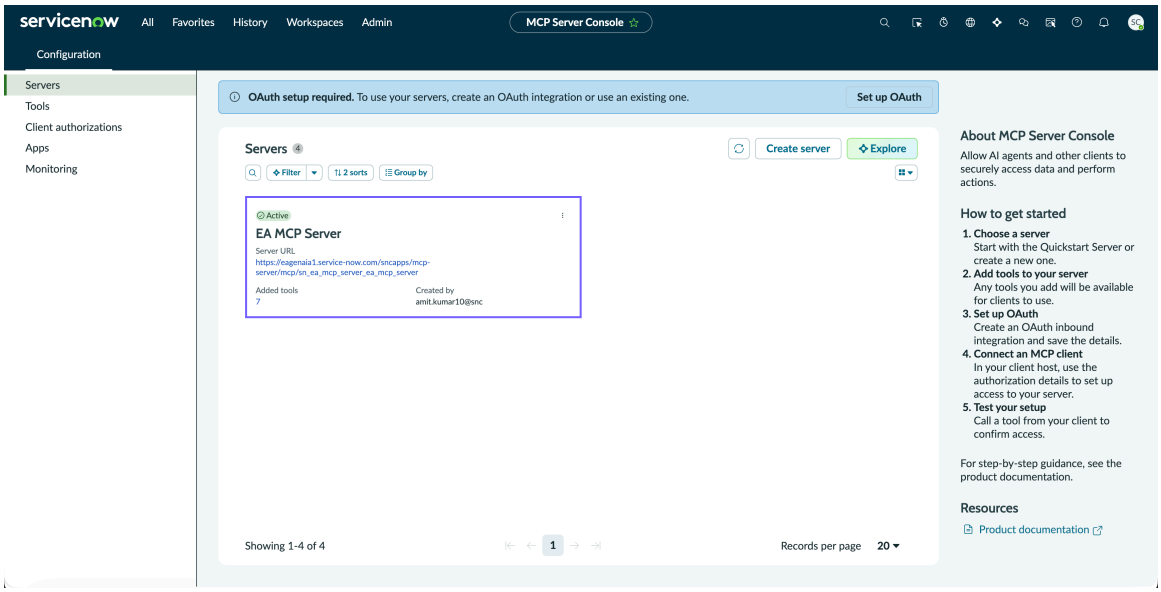
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Connect the EA MCP server to an AI assistant

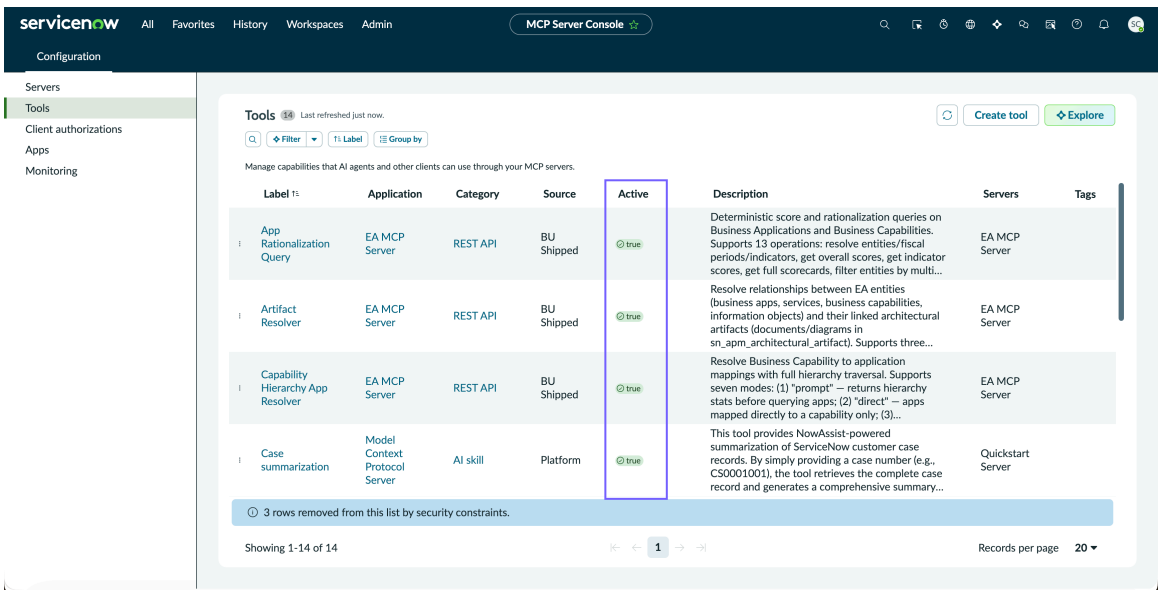
After configuring the EA MCP server, connect it to an AI assistant so the assistant can query business applications, capabilities, and architectural insights directly from your ServiceNow instance.

Before you begin

- The MCP for Enterprise Architecture application is installed. For details, see Install MCP for Enterprise Architecture.
- Confirm that the EA MCP server is active on your instance by navigating to **All** > **MCP Server Console**. If you don't see the server or to create another MCP server, see Create a Model Context Protocol server



- Confirm that the MCP for EA tools are enabled on your instance by navigating to **All** > **MCP Server Console** > **Tools**. To see which operations a tool can perform, open the tool and view its **Annotations** field. For example, the readOnlyHint annotation indicates that the tool only retrieves data.



Role required: admin or sn_mcp_server.admin

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Procedure

Connect the EA MCP server to your AI assistant.

For instructions, see Connecting to an MCP server from an MCP client.

Use the following values when configuring the connection:

- **Server URL:** `https://instance.service-now.com/sncapps/mcp-server/mcp/sn_ea_mcp_server_ea_mcp_server`, where *instance* is your ServiceNow instance name.
- **Connection method:** `npx mcp-remote` with Bearer token authentication.

Note: If you're using Claude Desktop, add an entry with the key `sn-gen-ai-ea` to your MCP server configuration file and set the `command` to `npx`.

Related topics

Enable Knowledge Graph system properties for the Enterprise Architecture query agent

Configure ServiceNow Otto for Enterprise Architecture (EA)

Enterprise Architecture Workspace access roles

Use

MCP for Enterprise Architecture connects any MCP-compatible AI assistant to your ServiceNow instance, giving enterprise architects and portfolio managers direct access to live EA data through natural language.

EA MCP server overview

After connecting the EA MCP server to an AI assistant, you can query live EA data using natural language. The AI assistant selects the appropriate MCP tool based on your request and returns results directly in the chat.

For step-by-step instructions, see Access Enterprise Architecture data using MCP tools.

Access Enterprise Architecture data using MCP tools

Use MCP tools to query live Enterprise Architecture data—including business application insights, capability mappings, architectural relationships, and rationalization data—from any MCP-compatible AI assistant.

Before you begin

Role required: sn_mcp_server.viewer and sn_apm.apm_read or sn_apm.apm_user

About this task

When you send a message, the AI assistant selects the relevant MCP tool from the available tools and retrieves the requested EA data. For a list of available tools, see Explore.

Note: This procedure uses Claude as an example AI assistant. Steps may vary depending on the AI client you use.

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Procedure

1. Open the Claude application on your computer.
2. Start a chat by sending a message such as `Show me the business applications that support the Finance capability`.
   The Capability Hierarchy App Resolver tool retrieves applications mapped to the specified capability and its child capabilities.
3. Continue the conversation to retrieve additional data — for example, send `Show me insights for the first application`.
   The Get EA Business App Insights tool generates Now Assist AI-powered insights for the specified business application.
4. Continue the conversation with additional prompts to retrieve the data you need.

   Example prompts you can use:

   - `Which applications are at risk based on rationalization scores?`—uses the App Rationalization Query tool.
   - `What entities are related to Workday?`—uses the Related Entities Resolver tool.
   - `What changed in this diagram compared to last month?`—uses the Diagram change analysis tool.
   - `Which entities does the Procure to Pay architecture diagram document?`—uses the Artifact Resolver tool.
   - `Which business capabilities are impacted if the PS ORA01 database fails?`—uses the Related Entities Resolver tool to trace dependencies across multiple levels.

Related topics

Working with Enterprise Architecture query agent

Generate insights into business applications

Compare Enterprise Modeling and Visualization diagrams

Working with application rationalization

Working with the business portfolio module

Enterprise Architecture Workspace access roles

MCP for Enterprise Architecture reference

Reference information for MCP for Enterprise Architecture, including tools, user roles, and components installed with the application.

Components installed with MCP for Enterprise Architecture

The MCP for Enterprise Architecture plugin installs tools, scripted REST APIs, and access controls.

Tools installed

Tool name [ID]	Description
App Rationalization Query (sn_ea_mcp_server.ea.app_rationalization_query)	Retrieves and scores business applications based on rationalization

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Tool name [ID]	Description
	criteria, supporting portfolio investment and modernization decisions.
Capability Hierarchy App Resolver (sn_ea_mcp_server.ea.capability_hierarchy_resolver)	Resolves business capability-to-application mappings by traversing the capability hierarchy, identifying which applications support each capability at every level.
Related Entities Resolver (sn_ea_mcp_server.ea.related_entities_resolver)	Retrieves entities related to a specified business application or architectural element, and returns dependencies and relationships across the EA data model. It also traces multi-level impact and dependency chains from a single configuration item.
Get EA Business App Insights (sn_ea_mcp_server.ea.get_ea_business_app_insights)	Generates Now Assist AI-generated insights for a business application, including health scores, rationalization signals, and strategic recommendations.
Diagram change analysis (sn_ea_mcp_server.diagram_change_analysis)	Compares two versions of an EA diagram and summarizes the architectural changes between them. Can also summarize a single diagram version. Available only when the Enterprise Modeling and Visualization plugin is installed.
Artifact Resolver (sn_ea_mcp_server.ea.artifact_resolver)	Identifies the architectural artifacts, such as documents and diagrams, that are linked to an EA entity, and the entities that a given artifact documents.

Note:

- A tool's annotation defines the operations that the tool can perform on your instance data. All tools installed with the application have the readOnlyHint annotation, which means they retrieve data but don't create, update, or delete records. To view a tool's annotation, open the tool record in the MCP Server Console Console and see the **Annotations** field.
- The EA MCP server is also associated with the Enterprise Graph tool (sn_mcp_server.enterprise_graph). This tool is provided by the platform and isn't installed with the application.

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Scripted REST APIs installed

Scripted REST API [API ID]	Description
EA MCP Tool API (ea_mcp_tools)	Provides the endpoints for retrieving EA data. The Get EA Business App Insights, Capability Hierarchy App Resolver, App Rationalization Query, Related Entities Resolver, and Artifact Resolver tools call these endpoints.

Access controls installed

Access control	Description
EA MCP Tool API	Restricts access to the EA MCP Tool API endpoints to users with the sn_apm.apm_read or sn_apm.apm_user role.

Related topics

Components installed with Enterprise Architecture Workspace

Enterprise Architecture Workspace access roles

MCP for Enterprise Architecture tool parameters

Parameters that each MCP for Enterprise Architecture tool accepts, and how to phrase prompts that return the data you need.

The tools installed with the application are annotated as read-only. They retrieve or analyze EA data but don't create, update, or delete records in your instance. For details about tool annotations, see Components installed with MCP for Enterprise Architecture.

Tools that return lists support pagination through the *limit* and *offset* parameters. When more results are available, the response includes `has_more` and `next_offset` values that the AI assistant uses to request the next set of results.

Get EA Business App Insights

Get EA Business App Insights parameters

Parameter	Description
sys_id	Sys ID of the business application to generate insights for. Required.
page_context	Prompt variant that shapes the insights. Possible values: • `business_portfolio`: Capability mapping and business value of the application. • `app_rationalization_list`: Consolidation, redundancy, and modernization recommendations. • `app_rationalization_bubble_chart`: Technical fitness compared with business value, for investment prioritization.

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Get EA Business App Insights parameters (continued)

Parameter	Description
	When omitted, general insights covering lifecycle, technical health, cost, risk, and strategic alignment are generated.
primary_capability_sys_id	Sys ID of the business capability to treat as the primary capability. Used only when *page_context* is `business_portfolio`. When omitted, the first capability connected to the application is used.
bubble_chart_axis	Sys ID of the bubble chart axis configuration (`apm_bubble_chart` record) to use. Used only when *page_context* is `app_rationalization_bubble_chart`.
fiscal_period	Sys ID of the fiscal period (`fiscal_period` record) to scope indicator scores to.

Capability Hierarchy App Resolver

Capability Hierarchy App Resolver parameters

Parameter	Description
mode	Operation to perform. Possible values: • `prompt`: Hierarchy statistics for a capability, before applications are queried. • `direct`: Applications mapped directly to the capability. • `hierarchy`: Applications mapped to the capability and all its descendant capabilities. • `all_top_level`: Portfolio-wide coverage across all top-level capability domains. • `bc_health`: Overall score, indicator scores, assessment status, health of supporting business applications, and an optional multi-year trend. • `resolve_capability`: Sys ID of a capability, matched by name. • `get_descendants`: All descendant capabilities of a capability. Required.
capability_name	Name of the business capability. Required for all modes except `all_top_level`. If no exact match is found, the closest matches are returned.
target_table	Table of the entities to look up. Used in the `direct`, `hierarchy`, and `all_top_level` modes. Default: `cmdb_ci_business_app`

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Capability Hierarchy App Resolver parameters (continued)

Parameter	Description
fiscal_period_name	Fiscal period for the `bc_health` mode, for example, `FY25`. When omitted, the current fiscal year is used.
include_trend	Option to include multi-year trend history in the `bc_health` mode. Default: false
trend_period_count	Number of historical fiscal years in the trend, up to 20. Used only when *include_trend* is true. Default: 5
limit, *offset*	Pagination controls. Default: 100 records, starting at offset 0

App Rationalization Query

App Rationalization Query parameters

Parameter	Description
operation	Query to run. Possible values: • `RESOLVE_ENTITY`, `RESOLVE_FISCAL_PERIOD`, `RESOLVE_INDICATOR`: Sys ID of an entity, fiscal period, or indicator, matched by name. • `LIST_INDICATORS_FOR_ENTITY`: Indicators that apply to an entity. • `GET_OVERALL_SCORE`, `GET_INDICATOR_SCORE`, `GET_FULL_SCORECARD`: Overall score, a single indicator score, or all indicator scores for an entity. • `FILTER_ENTITIES_BY_CRITERIA`: Entities that meet one or more score conditions. • `COMPARE_PERIODS`: Score trend across fiscal periods. • `CLASSIFY_QUADRANT`: Rationalization quadrant (invest, sustain, migrate, or retire) based on two indicators. • `SCORE_DISTRIBUTION`: Portfolio-wide distribution of an indicator or overall score. • `GET_TPM_RISK`, `FILTER_BY_TPM_RISK`: TLM technology risk score for an entity, or entities above or below a risk threshold. Required.
entity_type	Type of entity to query. For score operations: `business_app` or `business_capability`. For technology risk operations: `business_app`, `service`, `hardware_product_model`, or `software_product`. Required for all operations except `RESOLVE_FISCAL_PERIOD` and `RESOLVE_INDICATOR`.

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App Rationalization Query parameters (continued)

Parameter	Description
op_args	Operation-specific arguments, such as the entity name, indicator names, score conditions, or fiscal periods to compare. Required.
global_opts	Optional settings that apply to all operations: the fiscal period to score against, pagination (default 200 records, maximum 500), and whether to include entity names in the results.

Related Entities Resolver

Related Entities Resolver parameters

Parameter	Description
mode	Analysis to perform. Possible values: • `related`: Entities directly related to the source entities. • `list_related`: Full list of source and target pairs, with statistics. • `not_related`: Source entities that have no relationship to the target type, for example, applications without any service. • `not_related_multi_hop`: Source entities with no indirect relationship through a path of two or three tables, for example, applications without servers through their services. • `counts_only`: Relationship counts and statistics per source entity, for example, applications with more than three services. • `traverse`: Multi-level impact or dependency analysis from a single configuration item (CI), for example, what depends on a database. Required.
source_table, *target_table*	Tables of the source and target entities, which must be directly related through CI relationships. Required for all modes except `not_related_multi_hop` and `traverse`.
source_names	Names of up to 50 source entities to restrict the query to.
rel_type_sys_id	Sys ID of a relationship type, used when more than one relationship type exists between the same two tables.
path	Two or three table names, from source to target, for the `not_related_multi_hop` mode.
ci_name, *ci_sys_id*	Name or sys ID of the CI to start from, for the `traverse` mode. A name that matches more than one CI returns the candidates to choose from.
direction	Direction of the `traverse` analysis. Possible values:

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Related Entities Resolver parameters (continued)

Parameter	Description
	• `up`: What depends on the CI (impact analysis). • `down`: What the CI depends on. • `both`: Both directions. Default: up
max_levels	Number of relationship levels to traverse, up to 10. Default: 6
max_nodes	Number of CIs to discover during traversal, up to 500. When the limit is reached before all levels are traversed, the response indicates that the results may be partial. Default: 250
target_class	CI class to filter traversal results to, for example, `cmdb_ci_business_capability`.
include_paths	Option to include the relationship path from each discovered CI back to the starting CI. Default: true
include_svc_assoc	Option to also traverse service-to-CI associations, in addition to CI relationships. Default: false
limit, *offset*	Pagination controls. Default: 100 records (`counts_only` mode: up to 5,000; `traverse` mode: 10, up to 30), starting at offset 0

Artifact Resolver

Artifact Resolver parameters

Parameter	Description
mode	Lookup to perform. Possible values: • `artifacts_for_entity`: Architectural artifacts, such as documents and diagrams, linked to an entity. • `entities_for_artifact`: Entities that an architectural artifact documents. • `all_for_table`: Entity-to-artifact mapping for all entities in a table. Default: artifacts_for_entity

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Artifact Resolver parameters (continued)

Parameter	Description
entity_name	Name of the entity (`artifacts_for_entity` mode) or of the architectural artifact (`entities_for_artifact` mode). Not used in the `all_for_table` mode.
entity_table	Table of the entities to look up. Possible values: `cmdb_ci_business_app`, `cmdb_ci_service`, `cmdb_ci_business_capability`, `cmdb_ci_information_object`, `cmdb_ci_appl`, or `cmdb_ci_business_service`. Required for the `artifacts_for_entity` and `all_for_table` modes.
limit, *offset*	Pagination controls. Default: 10 records, up to 30, starting at offset 0

Diagram change analysis

This tool is available only when the Enterprise Modeling and Visualization plugin (com.snc.apm_modelling_tool) is installed on your instance.

Diagram change analysis parameters

Parameter	Description
action_type	Analysis to perform. Possible values: • `summary`: Structured overview of a single diagram, identifying the central business application and its connected entities. • `compare`: Comparison of two diagram versions, with the added, removed, and modified elements and a business-impact summary. Default: compare
diagram_version_a	Sys ID of the diagram instance to summarize, or of the baseline version when comparing. Required.
diagram_version_b	Sys ID of the updated diagram version to compare against the baseline. Required for the `compare` action.
diagram_type	Type of diagram. Possible values: Business Hierarchy Map, Business Capability Map, or Business Process Map. Default: Business Hierarchy Map
output_granularity_level	Level of detail in the comparison output. Possible values: `executive` (business summary) or `high` (detailed). Default: executive

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