Zurich Enterprise Architecture (formerly Application Portfolio Management)

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Enterprise Architecture (formerly Application Portfolio Management)

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.

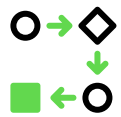
Enterprise Architecture helps enterprise architects manage business applications as part of an enterprise architecture practice focused on strategic planning, rationalization, and transformation.

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- Inadequate performance because of outdated applications.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.

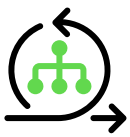


Enterprise Modeling and Visualization

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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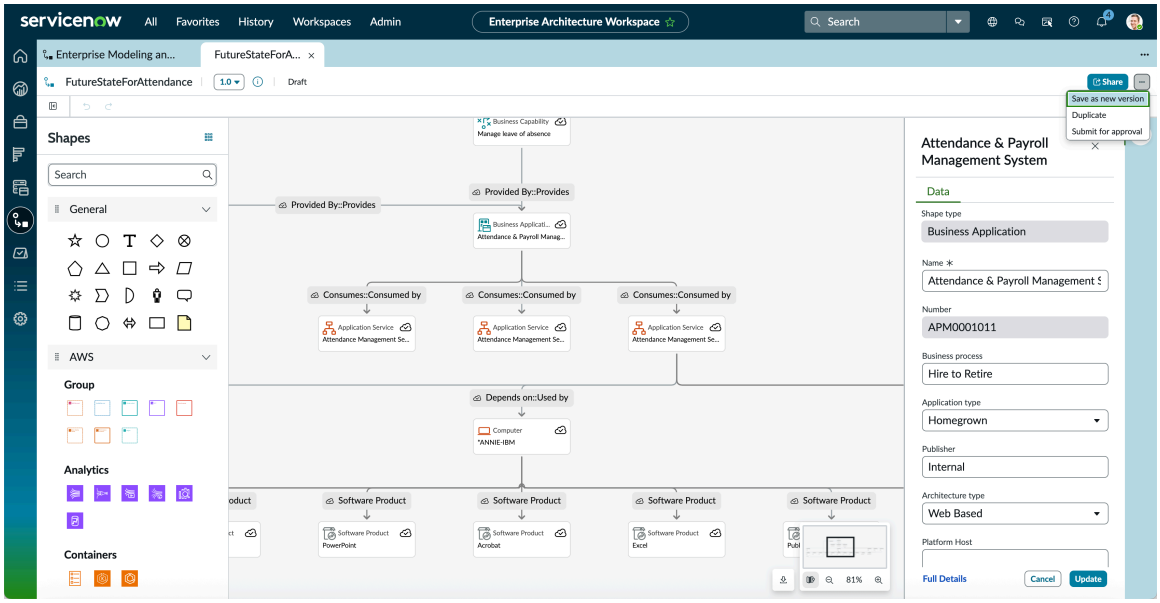

Enterprise Modeling and Visualization in the Enterprise Architecture Workspace enables enterprise architects to:

- 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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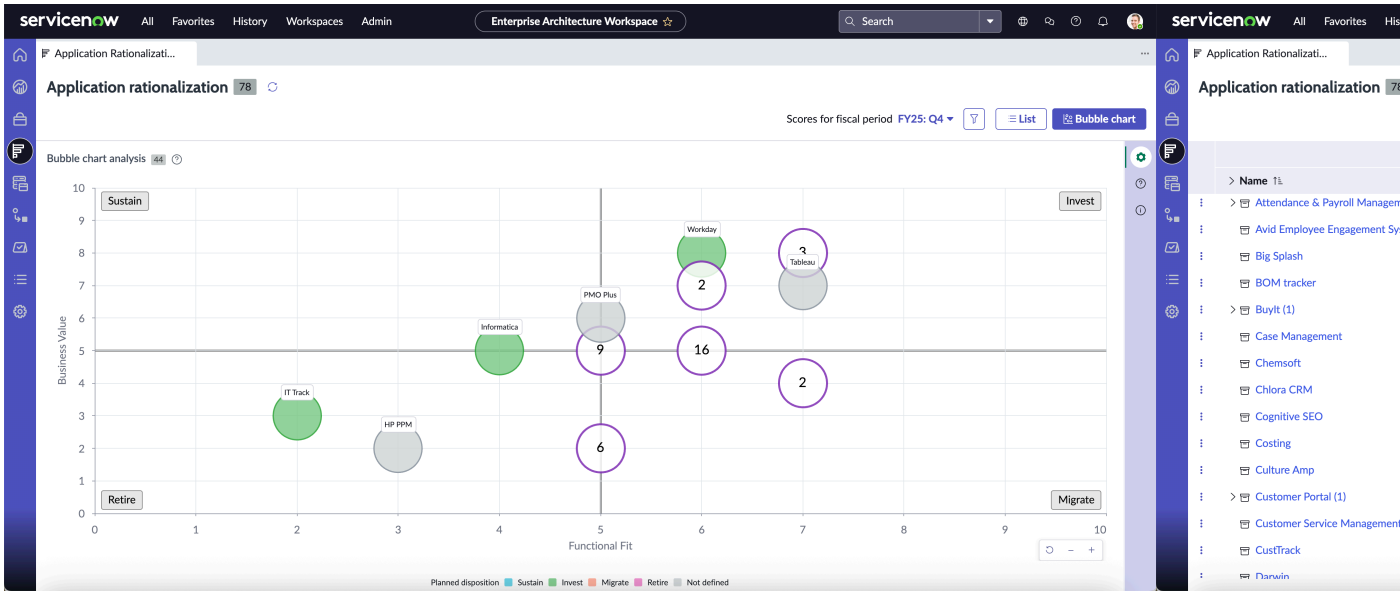

Application Rationalization enables you to:

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

Enterprise Architecture (formerly Application Portfolio Management)

Enterprise Architecture provides a complete picture of the application estate, including the underlying technology relationships.

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.

Enterprise Architecture starts by building a comprehensive inventory of your business applications, providing enterprise architects, and application owners with four lenses by which to analyse the portfolio: Business Capability Planning, Application Migration & Rationalization, Technology Risk Management, and Information Usage.

With this level of visibility, architects can easily identify transformational opportunities, whether that's reducing the number of on-premises or duplicate apps, reducing spend on non-critical applications, or addressing gaps in the business capability model.

Enterprise Architecture provides both the technology and work perspective that helps architects to easily assess the impact of any changes on the architectural state. Enterprise Architecture

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also ensures what is being planned is aligned with the technology and the strategic goals of the organization.

Get started

Explore Learn the key features and business value that Enterprise Architecture offers	Configure Configure Enterprise Architecture	Integrate Integrate Enterprise Architecture with other products
Use Learn how to use Enterprise Architecture	Reference 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 (formerly Application Portfolio Management) - Legacy

Learn about the features, functionality, and the business value that Enterprise Architecture (formerly Application Portfolio Management) provides.

Enterprise Architecture uses the following key solution components:

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- Application Classification
  - Focuses on Enterprise Business Applications, which can also include functional modules part of a larger ERP suite.
  - Provides additional attributes to classify applications in a new CI class, Business application, which extends the base Configuration Management Database (CMDB) configuration item.

    The configuration items used in Enterprise Architecture are related by establishing a CMDB relationship with each other.

  - Captures phased rollout/deployment of applications by business unit or geography.
  - Captures attributes from the referenced Software Model.
- Applications Assessment Framework
  - Indicators to assess the application across dimension such as cost, quality, risk, user satisfaction, and business alignment.
  - Common indicators from ServiceNow applications like Financial Management for costs, ITSM for support issues, PPM for investment details.
- Reports and Dashboards
  - Application Landscape Dashboard
  - Application 360 Dashboard
  - Application Assessment Dashboard
  - Application Strategy Recommendation (bubble chart)
  - Applications Rationalization Roadmap
  - Application Risk and Compliance Overview (role required is sn_grc.reader)
- Integration with other applications
  - Integrates with Project Portfolio Suite (PPS) to track execution of strategic goals and recommendations.
  - Integrates with Financial Management to assess applications costs and associated breakdowns.
  - Integrates with PPS to assess planned investments for applications.
  - Integrates with ITSM to assess the incidents, problems, and changes for the applications.
  - Integrates with Service Administration to generate an assessment questionnaire to a user or user group who use the business application and can assess its performance.
  - Integrates with Agile Development 2.0 Digital Portfolio Management (DPM) so that the DPM managers gain a comprehensive understanding of business applications that helps in taking informed decisions to invest, sustain, or replace them. DPM provides a unified workspace for owners to view and collectively manage their services and applications through the full life cycle. For more information, see Exploring Digital Portfolio Management.

Installed with Enterprise Architecture (formerly Application Portfolio Management) - Legacy

Several types of components are installed with Enterprise Architecture.

Tables installed with Enterprise Architecture (formerly Application Portfolio Management) - Legacy

Tables are added with activation of Enterprise Architecture.

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Table	Description
Application Bubble Chart [apm_bubble_chart]	Bubble chart configuration.
Application Service Risk [sn_apm_tpm_business_service_risk]	Stores risks on an application service for TPM.
Application Category [apm_application_category]	Application category to which the business application belongs to.
Application Category Group [apm_application_category_group]	Group of application categories.
Application Family [apm_application_family]	All application families.
Indicator [apm_metric]	Indicator definition to capture the indicator scores.
Indicator Score [apm_app_indicator_score]	Indicator scores calculated by the engine based on the profile.
Scoring Profile [apm_application_profile]	Scoring profile definition.
Profile Indicator [apm_application_profile_indicator]	Application profile indicator with a weightage numbers to calculate the overall score of a business application.
CI Score [apm_app_score]	Overall application score calculated by the engine based on the application profile.
Business Application [cmdb_ci_business_app]	All business applications.
Application Service Software Model [sn_apm_tpm_service_software_model]	Stores the software models (technologies) underlying each application service.
Goal Contribution Target [goal_contribution_target]	Goal contribution of a program for the target fiscal year.
Demand Action [apm_idea_action]	Actions available for submitting a demand.
Risk Parameter [sn_apm_tpm_risk_parameter]	Stores the risk parameters in TPM.
Risk Parameter Score [sn_apm_tpm_risk_param_score]	Stores the risk parameter scores for each software model in TPM. For example, if there are four parameters, then for each software model there are four records stored in the table.
Software Model Risk [sn_apm_tpm_software_model_risk]	Stores risks on the software models in TPM.
Hardware Model Risk [sn_apm_tpm_hardware_model_risk]	Stores risks on the hardware models in TPM.
TRM Product Lifecycle Request [sn_apm_trm_product_lifecycle_request]	Request for a TRM product lifecycle.
TRM Product Request [sn_apm_trm_product_request]	Request for a TRM product.
TRM Category [sn_apm_trm_standards_category]	TRM category.
TRM Phase [sn_apm_trm_standards_phase]	TRM phase.

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Table	Description
TRM Product [sn_apm_trm_standards_product]	TRM Product.
TRM Product Lifecycle [sn_apm_trm_standards_product_lifecycle]	TRM Product Lifecycle.
TRM Technical debt [sn_apm_trm_standards_technical_debt]	Technical debts information for TRM products.
Architectural Artifact [sn_apm_architectural_artifact]	Name of an Architectural Artifact.
Architectural Artifact Version [sn_apm_architectural_version]	Version of an Architectural Artifact.
Architectural Category [sn_apm_architectural_category]	Category of an Architectural Artifact.
Related Entities [sn_apm_related_entities]	Related entities for Architectural Artifacts.
New Table [sn_apm_ppt_status_report]	APM PowerPoint Status Report Table.
Data Classifications [cmdb_data_classification]	List of data classifications for information objects.
Data Classification Groups [cmdb_data_classification_group]	List of data classification groups for information objects.
Data Classification Mapping [cmdb_data_classification_mapping]	Mapping details of the data classification with an information object.

Roles installed with Enterprise Architecture (formerly Application Portfolio Management) - Legacy

Roles are added with activation of Enterprise Architecture.

Role	Description	Contains roles
sn_apm.apm_read	Access to view Enterprise Architecture dashboards provided by the base system and the underlying tables from where the data for the dashboards are retrieved.	Includes pa_viewer and cmdb_read roles. **Note:** Activate the Notify (com.snc.notify) plugin to include the notify_view role. View Application 360 dashboard, Application Landscape dashboard, Application Assessments dashboard.
sn_apm.apm_user	Access to update applications, view landscape, and roadmap.	Includes pa_viewer, and certification roles.

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Role	Description	Contains roles
		Note: • Activate the Notify (com.snc.notify) plugin to include the notify_view role. • Activate PPM Standard (com.snc.financial_planning_pmo) plugin to create project/program in CBP and TPM. For information on PPM roles, see Plugins installed with PPM Standard (Project Portfolio Management) . • View/update applications. • Request to create business applications. • View application landscape reports and dashboards. • View applications roadmap. • View Application 360 dashboard.
sn_apm.apm_admin	Create or update application records and access administration activities.	Includes sn_apm.apm_user, assessment_admin, certification_admin roles. • Create/update/delete application categories. • Create/update/delete application families. • Create/update/delete business processes. • Create/update/delete application indicators. • Create/update/delete application score profile. • Create/update/delete bubble charts. • View application indicator scores and application scores.

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Role	Description	Contains roles
		• View application assessment dashboard. • View Application 360 dashboard.
sn_apm.apm_analyst	Create applications and access landscape and dashboards.	Includes sn_apm.apm_admin and treemap_user roles. **Note:** Activate PPM Standard (com.snc.financial_planning_pmo) plugin to create project/program in Capability-Based Planning (CBP) and Technology Portfolio Management (TPM). For information on PPM roles, see Plugins installed with PPM Standard (Project Portfolio Management). • Create/update/delete applications. • Create/update/delete application indicator scores. • Create/update/delete application scores. • Create/update/delete Enterprise Architecture programs and targets. • Create/update/delete goals. • Access the Enterprise Architecture Service Portal pages for program navigation, category analysis, bubble chart view, application comparisons. • Create demand with application strategy related attributes. • View Application 360 dashboard.

UI policies installed with Enterprise Architecture (formerly Application Portfolio Management) - Legacy

UI policies are added with activation of Enterprise Architecture.

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UI policy	Table	Description
When data source is not PA	Application Indicator [apm_metric]	Shows the **Result precision** field when the data source is not PA.
When query condition is data source	Application Indicator [apm_metric]	Shows the **Query table**, **Consolidate**, **Aggregate type**, **Aggregate**, **Conditions and Group By** fields when the data source is custom script.
When Assessments and Surveys are data source	Application Indicator [apm_metric]	Shows the **Normalization scriptMetric Type** and **Metric Category** fields when the data source is Assessments and Surveys.
When PA is data source	Application Indicator [apm_metric]	Shows the **Source PA indicator** and **Frequency and Default breakdown** fields when the data source is PA.
When data source is custom script	Application Indicator [apm_metric]	Shows the **Custom Script** field when the data source is custom script.

Scheduled jobs installed with Enterprise Architecture (formerly Application Portfolio Management) - Legacy

Scheduled jobs are added with activation of Enterprise Architecture.

Scheduled job	Description
Business Application Certification On Demand	Schedules a certification task and the certification schedule is run on demand.
Business Application Certification Quarterly	Schedules a certification task and the certification schedule is run periodically every quarter.
Business Applications not related to any Business Capability audit	Checks the CI relationship [cmdb_rel_ci] table for business applications that are not related to any business capability.
Business Applications not related to any Software Model	Checks the CI relationship [cmdb_rel_ci] table for business applications that are not related to any software model.
Business Applications related to multiple Business Capabilities in the same hierarchy	Checks the CI relationship [cmdb_rel_ci] table for a possibility where the same business application is tied to multiple business capabilities at the same level of the hierarchy.
Load Application Indicators and compute Application Scores	Populates application indicator score and calculates application scores based on the scoring profile attached to the business application.

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Scheduled job	Description
Load TPM Risk Parameters and compute Application Service Risks	Calculates the software model risk and the business application risk.
Orphaned Business Capabilities	Checks for capabilities that have neither parent capability nor child capabilities, and do not have any business applications related to it.
Software Products with no lifecycle data (for product models that are used by the business applications)	Retrieves software model records used by the business applications and then checks if life-cycle data is present for the products related to these software models.
Update Business Capability Levels and Hierarchy IDs	Updates the order and hierarchy of the business capabilities in the Capability map.
Populate TRM Technical debt for production applications	Populates data in the TRM technical debts table.

Client scripts installed with Enterprise Architecture (formerly Application Portfolio Management) - Legacy

Client scripts are added with activation of Enterprise Architecture.

Client script	Table	Description
Mark **Goal** mandatory with respect to Enterprise Architecture view	Program [pm_program]	Marks **Goal** mandatory with respect to Enterprise Architecture view.
Defaulting comments for scripted indicator	Application Indicator [apm_metric]	If the **Data Source** field is Custom script, then the **Custom script** field is populated with the sample custom script.
Populate CI manufacturer for applications	Business Application [cmdb_ci_business_app]	Populates manufacturer for business application.
Set view in Enterprise Architecture to true	Program [pm_program]	Sets the **Used by** *`Enterprise Architecture`* check box to true.
Set mandatory attributes for Enterprise Architecture goals	Goal [goal]	Sets mandatory attributes for Enterprise Architecture goals.
Restrict Sustain	Demand Action [apm_idea_action]	Restricts sustain from the list of strategies.

Business rules installed with Enterprise Architecture (formerly Application Portfolio Management) - Legacy

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Business rule	Table	Description
Populate **Short Description**	Goal [goal]	Populates **Short Description** of the goal based on the attributes provided.
PA Indicator frequency check	Indicator [apm_metric]	Checks the frequency of the performance analytic indicators.
Only one Enterprise rollout is allowed	Business Entity [apm_rollout_entity]	Allows only one enterprise rollout for a business application.

Enterprise Architecture (formerly Application Portfolio Management) portal - Legacy

The Enterprise Architecture portal gives you an enterprise-wide applications landscape view of the number of applications and other key metrics. As an enterprise architect (EA), you can view and access all the Enterprise Architecture modules from this portal.

You can navigate to the Enterprise Architecture portal page by clicking **Enterprise Architecture** > *`Enterprise Architecture Workspace`*. The role required is sn_apm.apm_analyst.

Important:

You're encouraged to use this feature in the Enterprise Architecture Workspace. Enable the Enterprise Architecture Workspace (sn_apm_ws) plugin from the ServiceNow store.

For more information on Enterprise Architecture Workspace, see Enterprise Architecture Workspace. For specific documentation about these features in the Enterprise Architecture Workspace, see Enterprise Architecture Workspace Overview.

The Enterprise Architecture (formerly Application Portfolio Management) portal consists of four sections. The sections provide a quick access to view the portfolios of business capability, information, application, technology, and create goals, demands, and programs.

Business Portfolio

View the number of business capabilities defined by your organization that have been assessed and are yet to be assessed. View the number of business applications that support the capabilities but are at a major risk.

- Click Hierarchy Map to view the capability map in a new tab that displays the business capabilities and subcapabilities in a hierarchy.
- Click Business Planning to navigate to the business planning portal.

Information Portfolio

Capture the information from the assets of your organization as information objects. You can connect the information object to your business applications to have a portfolio of application information, ready and accessible to use at any time. The entities in the information portfolio are either configuration items or columns of tables. They are structurally designed to relate to each other either by CMDB CI relationships or by referencing the data columns of tables.

The numbers below each entity of the Information Portfolio represent the following data:

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- Data Domains: Total number of records in the Data Domain [sn_apm_data_domain] table.
- Information Objects: Total number of records in the Information Object [cmdb_ci_information_object] table.
- Database Catalogs: Total number of records in the Database Catalog [cmdb_ci_db_catalog] table.
- Unstructured DB Catalogs: Total number of records in the configuration item tables such as:
  - configuration file (cmdb_ci_config_file)
  - file system (cmdb_ci_file_system)
  - exchange mail box (cmdb_ci_exchange_mailbox)

Note:

Your enterprise might have any number of database catalogs, but only the number of database catalogs that are linked to the information objects are displayed as counts in each of the information portfolio sections. Those information objects in turn are related to the business applications, Similarly, only those numbers of database instances that are referenced in the database catalogs are summed up as database instances.

Click the **Information Objects** link to view the details of the information objects that are related to the business applications in your enterprise. See Information Portfolio.

Note: The information objects must be related to the business application for you to view them in the Information Objects page that opens.

Application Portfolio

Track the applications that support your business capabilities and manage them effectively to fulfill the goals of your organization. The portfolio provides a list of applications with information such as their category, manufacturer, and type.

- Click Applications to navigate to the list view of business applications in your organization.
- Analyze your applications by category or family and group them the way that you want them to be in the application Landscape view.
- Click Analyze to navigate to the Group Analysis page to analyze the applications and their scores.

Technology Portfolio

View the number of hardware models and software models that are linked to your business applications. You can also get a count of the number of these models that are at high risk. Click the **Technology Portfolio** link to go to the TPM timeline view and know the status of the hardware and software models life cycle.

Use the Technology Reference Model to define the software products standards and manage unapproved software in your organization. For more information, see Exploring Technology Reference Model - Legacy.

Opportunities & Solutions

View the number and click to view the list of goals, demands, and programs. Click any goal, demand, or program in the list to update its details. Use the **Create** link to directly create a goal, demand, or program.

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- Create a goal to track, align, and report the progress of the work toward it. For example, a goal could be set to reduce Capex or reduce the number of applications within a target date.
- Create a demand to capture your strategic goal for the application.

  To create a demand from the application menu, navigate to **Enterprise Architecture** > **Enterprise Architecture Workspace** > **Portfolio**

- Create a program to meet the goals. Enterprise Architecture takes you through a process to add targets and identify opportunities.

  Note: You can view and create programs from the Program section only when you activate PPM Standard (com.snc.financial_planning_pmo) plugin.

Notifications

View the results of desired and scripted audits, the number of hardware and software models that face high and moderate risks, expiring on the current date and in the next 90 days, and pending certification instances that are open and not 100% complete. Click the notification to open the related task or the related data certification schedule instance to view the record details.

Recent Activity

View your most recent activity of creating a goal, demand, or program for a fiscal period.

Management of business applications - Legacy

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.

Important:

Starting with the Xanadu release, the legacy business applications module is moved to the Enterprise Architecture Workspace. To learn more, see Exploring the application portfolio.

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 distinction between the records whether it's a business application running on a host or a platform hosting the applications lies in the **Architecture type** values of platform application and platform host.

Related topics

Add or edit a business application - Legacy

Business application relationship with CIs for application information - Legacy

View business application roadmap - Legacy

Suggestions to relate technology models to an application service - Legacy

Monitor business applications with the application landscape dashboard - Legacy

Business application relationship with CIs for application information - Legacy

You can create relationships between the business application and other CIs. To get reports about a business application, there must be an association between the application and the CIs that make up the application.

Business applications have to be integrated with the other CIs to examine the CI and its relationship from a CI relation formatter.

CMDB dependency views

Dependency view graphically displays an infrastructure view for a configuration item (CI) and the business application or business services that it is part of and that it supports.

In Enterprise Architecture, you can see the dependency views by clicking the show dependency views icon in the related items of the Business Application form.

In addition to the existing Enterprise Architecture specific configuration items based on references versus relationships, a relationship is established between the Business Capability configuration item and the Business Application configuration item.

To view the mapping of the related items, navigate to **Dependency Views** > **Map Related Items**. The table provides a list of configuration items that are related to each other by a referenced related field, because of which the dependency view is rendered.

Related topics

Add or edit a business application - Legacy

View business application roadmap - Legacy

Monitor business applications with the application landscape dashboard - Legacy

Suggestions to relate technology models to an application service - Legacy

Use the software models that the suggestions engine identifies and relate them to your application service, instead of manually searching and mapping them.

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The business applications used in your organization consume application services to fulfill a business capability for the business enterprise.

- Various application instances of a business application run on hardware that require necessary software models to provide the business capability.
- A cmdb relationship establishes an association between the business application and the application service. But then, an application owner is required to manually associate an application service to a software model.
- For the association to be precise, your software model data for the business application must be maintained up-to-the-minute.

To avoid manual intervention and prevent association to a software model that has non-current data, the software model suggestion engine suggests possible software models to an application service. You can use the suggested software models, select those models that are appropriate, and associate them to your application services. This suggestion helps you to configure and maintain software model data for your business applications.

Working model of the software model suggestions engine

The software model suggestions engine:

- Scans hardware configuration items consumed by Application Services. A CMDB API retrieves all hardware CIs for an application service, and a Service Mapping API retrieves the hardware CIs for application service.
- Retrieves the new software models installed on the hardware since the last run of the scheduled job.
- Populates the Retrieved Software Models [sn_apm_service_software_model_suggestion] table with the discovered software models.
- Evaluates and compares the current software model suggestions status with the previous extracted suggestion results from the last run in the Technology Models Retrieval Logs [sn_apm_suggestion_engine_run_log] association table.

  The Technology Models Retrieval Logs [sn_apm_suggestion_engine_run_log] table also stores the count of hardware models on which the application service is running.

- Updates status accordingly as **New**, **Associated**, **Ignored**, or **Deleted**.

Related topics

Associate suggested technology models to an application service - Legacy

Monitor business applications with the application landscape dashboard - Legacy

View the application landscape dashboard for an overview of all the applications used in your business enterprise. The dashboard provides pre-configured reports on applications, grouped by categories. You can also configure and add reports.

Before you begin

Important:

Starting with the Xanadu release, the legacy application landscape dashboard is moved to the Enterprise Architecture Workspace. To learn more, see Explore the Enterprise Architecture Workspace dashboard.

You must have the Performance Analytics – Content Pack – Enterprise Architecture (com.snc.pa.apm) plugin activated to use the Application landscape dashboard.

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Role required: sn_apm.apm_user

About this task

On the dashboard, you can view the following reports:

- Top 10 applications actively used, grouped by application category and application family.
- Applications grouped based on install type, platform, application category, manufacturer, technology stack, and so on.
- Details of number of applications by category versus the manufacturer details.
- Number of applications by application category versus the age of the applications.

Procedure

Navigate to **Application Portfolio Management** > **Application Portfolio Analysis** > **Landscape Analysis**.

To modify the data and generate charts based on **Portfolio**, **Application Category**, **Install Type**, **Application Type**, **Business Process**, and **Business Unit**, make the appropriate selections from the dashboard filters.

Note:

Activate PPM Standard (com.snc.financial_planning_pmo) plugin to apply the portfolio filter.

To save a chart in JPG or PNG format, point to the chart and then select the appropriate option from the menu that appears.

Related topics

Add or edit a business application - Legacy

View business application roadmap - Legacy

Business application relationship with CIs for application information - Legacy

Suggestions to relate technology models to an application service - Legacy

Management of business capability - Legacy

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.

Important:

Starting with the Xanadu release, the legacy business capability module is moved to the Enterprise Architecture Workspace. To learn more, see Exploring business capabilities.

As business organizations grow, it's imperative for an enterprise architect to constantly assess the business capabilities to know how to strengthen the business processes. Business capabilities are the abilities required to support a business process. They are assessed by indicators to provide indicator scores.

The indicator framework is enhanced to support assessment of business capabilities in addition to supporting business applications. Capture business capability as a CI type for which the score is generated.

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Use the following capability assessments set of application menus to configure assessment. Access the scores for business capability, in a similar manner that you access and assess the scores of business applications:

- Create and assess CI Score for a fiscal period: **Enterprise Architecture** > **Capability Ratings** > **Capability Scores**.
- Create and update indicator scores: **Enterprise Architecture** > **Capability Ratings** > **Capability Indicator Scores**.
- Create a scoring profile and associate it with a business capability CI: **Enterprise Architecture** > **Administration** > **Scoring Profiles**.
- Create an indicator and configure the data source: **Enterprise Architecture** > **Administration** > **Capability Indicators**.

  If the data source is of **Assessments** type, then you can generate survey assessments for the business capabilities in the Indicator form by selecting the **Generate Assessments** button. Apply filter conditions to the business capability table and select the users in the Generate Assessment UI. You can view the status of assessments instances in the **Assessments Instances** tab and the results in the **Metric Category Results** tab. See: Generate survey assessments and view results within Enterprise Architecture.

- Access business process capability map: **Enterprise Architecture** > **Capability Ratings** > **Capability Map**.

Related topics

Assess business capability - Legacy

Assess business capability - Legacy

Overview of business capability planning - Legacy

Rationalization of applications by capability - Legacy

Overview of business capability planning - Legacy

Capability-based planning directs toward planning, designing, and delivering effective plans of action to improve business capabilities in a business enterprise. The effective implementation of capability-based planning lies with the roles of business personas such as the business owner, application portfolio owner, and capability planner in understanding the existing capabilities and in planning to fill the technical gaps.

Important:

Starting with the Xanadu release, the business capability module is moved to the Enterprise Architecture Workspace. To learn more, see Exploring business capabilities.

Capability-based planning is a mechanism to better understand how to map strategic plans to your investments. If your capabilities are well-defined, then your organization structure aligns to those capabilities, because the capability defines what the organization does.

Business capability is a configuration item (CI) that helps to understand how the business capability is supported by the related applications and services.

Capability-based planning is structured as a hierarchy and supports up to six levels of capabilities in its series, which means a parent capability can have six levels of sub-capabilities beneath its level. However, a capability in each level of the hierarchy can have as many capabilities as its siblings at its own level and each one can have one-to-many relationships between the levels.

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Personas governing capability based planning

Following are the personas with appropriate roles to use capability-based planning:

Business owner

As a business owner it is important that you perceive the existing capabilities and work out strategies to identify the areas that need investments to plan for better allocation of expenses on projects.

Application portfolio owner

As an application portfolio owner, you have to identify those capabilities that impact your business applications and address them, so that the business applications function effectively.

Capability planner

As a capability planner, you have to establish capabilities in the light of the industry norms of applying procedures that have been termed as a best practice, being most effective and yielding the best results.

What to do next

Use the capability map for planning investments in applications.

Rationalization of applications by capability - Legacy

The Analyze screen enables you to evaluate business capabilities. You can rationalize all the business applications in a specific business capability. Decide whether to invest, sustain, or to replace an application by configuring multiple combinations of indicators in a bubble chart. Bubble charts are interactive graphs that help you identify strategies by plotting capability indicator scores.

For each business capability, based on the indicator scores in the bubble chart, you can create a demand to achieve your goal. A demand is a request created by demand managers and demand users. The user submits a demand and the demand manager approves the demand.

Important:

Starting with the Xanadu release, the legacy business applications module is moved to the Enterprise Architecture Workspace. To learn more, see Rationalization of business applications.

Analyze applications by capability - Legacy

Consolidate the application details by capability. Narrow down the target applications by filtering them with the application indicator scores and values in the Group Analysis page.

Before you begin

Role required: sn_apm.apm_analyst

About this task

Use the bubble chart to plot the indicator scores of the applications in the X axis and Y axis. You can then use these scores to strategize goals and create a demand to invest in, replace, or sustain the application.

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Important:

Starting with the Xanadu release, the legacy business applications module is moved to the Enterprise Architecture Workspace. To learn more, see Rationalization of business applications.

Procedure

1. Navigate to **All** > **Enterprise Architecture** > **Application Portfolio Analysis** > **Analyze**.
   The Group Analysis page is displayed.
2. From the Category list, select **Business Capability**.
   The list of capabilities is displayed.
3. In the Assessment Period section, select the **Assessment Period**.
4. In the Filter Apps section, set the application indicator scores to categorize the list of capabilities.
5. Open a capability by clicking it.

   A bubble chart is opened for the capability. The bubble chart helps you to view the metrics of the application indicator scores that fall within the filtered values.

   Use the **Application Analysis** section to compare applications with the selected indicators.
6. **Optional:** Change the configurations of the bubble chart.

   a. Click the configuration icon .

   b. On the form, fill in the fields.

Select Chart Dimensions form

Field	Dimension
X and Y	Dimension of the indicators that fall in the X and Y axes. (Optional) Along with the pre-configured dimensions, you can also view the bubble chart that you create using the Application bubble chart form.
Bubble Size	Indicator scores determine the size of the bubble.
Display bubble labels	(Optional) Option to display the bubble labels in the Bubble chart. This option helps you to have a clear display of bubbles, uncluttered by their labels when there are many bubbles in a quadrant.

What to do next

Point to the bubble in the chart and click the application. Right-click the bubble and select #Create Demand#to#create a demand for the application.

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Configure categories to display in Group Analysis page - Legacy

Configure the categories to display in the Categories list of the Group Analysis page.

Before you begin

Role required: sn_apm.apm_analyst

About this task

Use the choices table (sys_choice) to select or unselect the categories to show or hide in the Group Analysis page.

Procedure

1. Navigate to **All** > **#System Definition** > **Choice Lists**.
2. In the Element column, search for the `group_by` element type.
   The existing group_by choices appear.
3. From the list, select the choice item that you want to show or hide in the Categories list in the Group Analysis page.
4. Open the record to edit.
5. Hide or show the item by selecting or unselecting the **Inactive** check box to.
6. Click **Update**.

Technology Portfolio Management - Legacy

The underlying technologies of the business applications used in your business enterprise have a shelf life that must be actively managed and diligently monitored to track their versions and life cycle. Use the timeline view of the Technology Portfolio Management to track their dates, and then create a demand or a project to upgrade or retire them.

Important:

Starting with the Xanadu release, the legacy Technology Portfolio Management module is moved to the Enterprise Architecture Workspace. To learn more, see Manage the Technology Portfolio Management (TPM) in Enterprise Architecture Workspace.

The technology of a business application is also known as a software model. A software model is a specific version or configuration of software.

The software models used in your business applications can be operating systems, database management systems, development tools, and middleware, each of which has a life cycle. If these life-cycle stages are not tracked, there are risks where the vendor may not support them any longer and 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.

Internal and external lifecycle stages of the software product

The business applications used in your organization are all linked to one or more application services. Each of the application services runs on one or more technologies or software models.

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Note: In the context of Application Portfolio Management, an application instance is an application service.

The software product (each model and full version) has a sequence of life cycle stages/phases from its installation to retirement. Internally, business organizations set a date based on the life-cycle phase of the software products. These phases can be Early Adopter, Mainstream, Declining use, and Retired.

The vendor also sets a date for the software based on the vendor life-cycle phases such as Pre-release, General Availability, End of Life, and Obsolete. The support from the vendor may vary depending on the phase of the technology. When the software model reaches the stage of obsolescence, the vendor may stop supporting the technology.

Note: The **Publisher** choice type of the **Lifecycle type** field in the Software Product Lifecycle form is the same as the External Lifecycle that is being used in Enterprise Architecture.

As a software asset management user or a software model manager, you can add the software product life-cycle details to the software model for each full version. To use a TPM screen with data on the timeline, ensure that the software life-cycle data is populated in the software product life-cycle table. Similarly, ensure that the hardware life-cycle data is populated in the hardware model table after the technology model suggestion engine runs.

Integration with Service Mapping to use Technology Portfolio Management

Create application instances in the Mapped Application Service [cmdb_ci_service_discovered] table and relate business applications to corresponding application services.

Enterprise Architecture no longer integrates with Service Mapping through the **Instances** tab. The application **Instances** tab has been removed and the apm_app_instance table has been deprecated, which is replaced by the Mapped Application Service [cmdb_ci_service_discovered] table. Any data existing in the application instances table must be migrated to the application service table. If you are upgrading to the Madrid release, then contact the ServiceNow personnel for migrating the data.

Note: If you are using the Mapped Application Service [cmdb_ci_service_discovered] table for application instances, then you can proceed to upgrade from Kingston. However, if you are using the deprecated apm_app_instance table to store application instances, then migrate the data in the apm_app_instance table to the Mapped Application Service [cmdb_ci_service_discovered] table.

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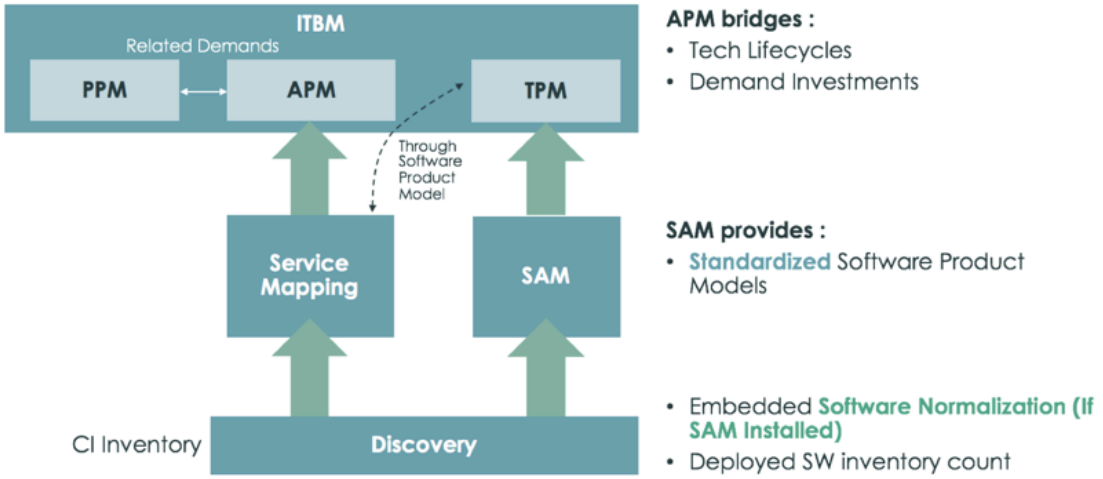
Connecting software product life cycles to business application



TPM depends on Software Asset Management (SAM) to retrieve the technology information of the software product

Warning: TPM and TRM require installation of either SAM Foundation or SAM Professional. Before installing the SAM Foundation plugin, carefully review the Software Asset Management Foundation plugin migration documentation. Contact ServiceNow Support if you do not have either SAM Foundation or SAM Professional installed on your instance.

You can use Technology Portfolio Management even if you do not have Software Asset Management (SAM) installed. A preconfigured Software Product Model table is available to all TPM users. You can create a list of all software models that your organization uses either manually or import from an existing database or source.

Using TPM depends on SAM plugins. The dependency is as follows:

With SAM Premium plugin

To access the Product Classification [samp_sw_product] table, you need the Software Asset Management Premium plugin. Reference to samp_sw_product_classification is in samp_sw_product table. This content table is referenced in the Software Product Model [cmdb_software_product_model] table to retrieve the technology information. Subscribing to the SAM Premium plugin enables you to view the applications by Business Applications as well as by Product Classification in the TPM timeline.

Without SAM plugin

Product classification is not available without this plugin. Viewing by Product Classification is not available in the TPM timeline view. Software model information is retrieved from the SW Product Model [cmdb_software_product_model] table. Populate this table manually or export the content from an excel sheet.

Related topics

View technology risks in timeline - Legacy

Relate business application to application service using CI relationship editor - Legacy

Associate an application service to hardware model - Legacy

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Associate an application service to a software model - Legacy

Create a risk parameter - Legacy

Technology risk calculation - Legacy

Run scheduled job to generate risk values - Legacy

Technology risk calculation - Legacy

Assess the technology risks of your business applications by calculating their risks at the software product (considering the model and full version) level and then at the business application level.

Important:

Starting with the Xanadu release, the legacy Technology Portfolio Management module is moved to the Enterprise Architecture Workspace. To learn more, see Manage the Technology Portfolio Management (TPM) in Enterprise Architecture Workspace.

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

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

Parameters to determine hardware model risk

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.

Risk at hardware model level

Based on the four hardware risk parameters, the technology model suggestion engine calculates the risk of the hardware model and 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.

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 of the hardware or software models on which the application service runs is evaluated to be on high risk, then the application service is determined to be at a 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.

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- 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), application service risk level, and business application risk level. For more information, see Configure risk bubble up logic.

Related topics

Configure script to customize risk calculation - Legacy

Run scheduled job to generate risk values - Legacy

Enterprise Architecture Cloud Assessment - Legacy

The Cloud Assessment scoring profile in Enterprise Architecture helps you to evaluate a business application for its cloud migration readiness.

To get the cloud assessment option in the Enterprise Architecture, you must install the Enterprise Architecture Cloud Assessment application from the#ServiceNow Store. For instructions to download the application, see Install Cloud Migration Readiness Application.

Indicators for the Enterprise Architecture Cloud Assessment

The indicators are associated with the Enterprise Architecture Cloud Assessment scoring profile. These indicators help you to evaluate business applications for their cloud migration readiness.

To check out all the indicators, see Enterprise Architecture (formerly APM) Cloud Assessment Scoring Profile.

Applying the Enterprise Architecture Cloud Assessment scoring profile to a business application

You can apply the Cloud Assessment scoring profile for a business application to assess its eligibility for cloud migration. In a business application form, you can select the Enterprise Architecture Cloud Assessment scoring profile for the **Application scoring** profile field. For information to fill other fields, see Add or edit a business application.

Analyzing the Enterprise Architecture Cloud Assessment scoring of a business application

You can analyze and identify strategies for cloud migration of a business application by plotting application indicator scores through interactive graphs in the bubble chart. On the Group Analysis page, use the bubble chart to plot the indicator scores of the applications in the X and Y axis. You can then use these scores to strategize goals and create a demand to invest in, replace, or sustain the application. To know more about analyzing the indicators scores of a business application, see Analyze application scores in a bubble chart.

Related topics

Install Application Portfolio Management (APM) Cloud Assessment Application - Legacy

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Architectural artifacts - Legacy

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.

Important:

Starting with the Xanadu release, the legacy architectural artifact module is moved to the Enterprise Architecture Workspace. To learn more, see Exploring architectural artifacts.

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

Note: You need the sn_apm.apm_user role to view or create architectural artifacts.

As an Enterprise Architect, use the Architectural Artifacts module to perform the following tasks:

- Review and approve architectural artifacts.
- Keep track of 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 and business applications.

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 and Business Capabilities.

Related topics

Create or edit an architectural artifact - Legacy

Associate an artifact to a business entity - Legacy

Managing categories for artifacts - Legacy

Create an artifact version - Legacy

Approve or reject an artifact version request - Legacy

Approve architecture review requests - Legacy

Enterprise Architecture (formerly Application Portfolio Management) integration with Lucidchart - Legacy

Managing categories for artifacts - Legacy

Categories are especially useful for grouping your artifacts into relevant sections. You can create and edit categories as required, but only one category can be assigned at any one time to an architectural artifact.

Important:

Starting with the Xanadu release, the legacy architectural artifact module is moved to the Enterprise Architecture Workspace. To learn more, see Manage architectural artifact categories.

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Use categories to group your#architectural artifacts more efficiently. As the artifacts administrator, you can create and edit any number of categories. The categories can contain references to the child categories and to the artifacts. When creating an architectural artifact, the category must be pre-defined to ensure it can be assigned to the artifact. The following categories are provided from the base system. These categories are aligned with the TOGAF standard.

- Application Architecture
- Architecture Vision
- Business Architecture
- Data Architecture
- Opportunities and Solutions
- Preliminary Phase
- Technology Architecture

Business Application Lifecycle Management services - Legacy

You can order a business application for your enterprise like any other service catalog item and register it as a new application in the application portfolio.

Enterprise Architecture integrates with Service Catalog to create a service catalog category called Business Application Lifecycle Management Services.

Use this service catalog category to request and register a business application in Enterprise Architecture. As you on-board a new application into the Enterprise Architecture inventory, the machine-learning business application solution predicts and suggests an appropriate category for the application. For more information, see Predictive Intelligence for Application Portfolio Management.

Furthermore, you can also use this service catalog category to request a review of a technology change in the business application with the IT Architecture Review Board.

You can also use the business application lifecycle management service catalog to decommission an application that you no longer require. Proper decommissioning of an application takes care of:

- Archival of data generated when the application was in use.
- Uninstall all related software that the application depended on.
- Removal of any hardware dependency for the software.

Related topics

Use Business Application Lifecycle Management to request or retire an application - Legacy

Manage Business Application Lifecycle Management service requests - Legacy

Use Business Application Lifecycle Management to request an architecture review - Legacy

Application assessment - Legacy

Set up indicators to measure the usability, cost, quality, performance, and risk of applications. Evaluate and score your business applications based on qualitative inputs. You can translate abstract information of applications based on surveys and assessments into more tangible concrete metrics. These assessments help you make strategic decisions on whether to replace or upgrade applications.

You can use existing assessment metric types or configure them per your requirements.

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Application assessment in Enterprise Architecture evaluates business applications using measurable criteria to produce application scores. These scores help portfolio managers and architects compare applications, identify risks, and prioritize investment or retirement decisions.

The application assessment framework consists of three key components that work together:

- Assessment indicators define individual evaluation criteria, such as cost, risk, quality, or usability.
- Scoring profiles group multiple indicators and define how they are weighted for a specific assessment context.
- Application scores are calculated results that reflect how well an application performs against the selected scoring profile.

Related topics

View all application scores - Legacy

View application indicator scores - Legacy

Add or edit a scoring profile

Add or edit an application indicator

Activate or turn off an application or capability indicator

Add a business capability

Update the hierarchy of a business capability

Framework setup for application assessment - Legacy

You can create indicators and score profiles based on which you can assess your applications. Application indicators are business metrics that help derive application scores.

Enterprise Architecture is integrated with key applications in the ServiceNow platform to provide a deep insight into the applications. These integrations help you:

Identify cost saving opportunities

The Hierarchy of Segments in the Financial Management application tracks the cost allocations at the application level, which provides a complete cost breakdown for the application.

Organize applications to determine their rationalization

You can identify multiple applications assigned to the same application category, region, or business. This information helps you to know who is using the applications, the usage frequency, the application status, and make informed decisions.

Identify opportunities for modernizing and investing in application

You can identify applications that have contracts to renew, low usage, or low customer satisfaction based on surveys results.

Use the preconfigured indicators or create your indicators to assess applications with dimensions such as cost, quality, technical risk, investments, user satisfaction, and business value. Preconfigured indicators are sourced from Financial Management, IT Service Management, project portfolio management, surveys, assessments, SQL queries, performance analytics, and custom scripts.

Note: Enterprise Architecture supports only the Fiscal Calendar type, Standard.

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Related topics

- Create or edit an indicator to assess an application - Legacy
- Create an application score profile and attach profile indicators - Legacy
- Job schedule to compute application scores - Legacy

Preconfigured indicators and their source applications - Legacy

The preconfigured Enterprise Architecture indicators and the applications they have been sourced from help you to assess the applications across dimensions such as cost, quality, and risk. You can create additional indicators, apart from the preconfigured indicators, by copying and modifying them.

Preconfigured indicators and sources

Indicator name	Frequency	Type	Source	How is it calculated?	Description	Jobs
Facilities cost	Quarter	Custom Script	ITFM product. ITFM_Allocation_Aggregate table	Data will be available in ITFM tables only after the financial modeling process is completed	Facilities cost for business application	
Hardware cost	Quarter	Custom Script	ITFM product. ITFM_Allocation_Aggregate table	Data will be available in ITFM tables only after the financial modeling process is completed	Hardware cost for business application	
Labor cost	Quarter	Custom Script	ITFM product. ITFM_Allocation_Aggregate table	Data will be available in ITFM tables only after the financial modeling process is completed	Labor cost for business application	
Other cost	Quarter	Custom Script	ITFM product. ITFM_Allocation_Aggregate table	Data will be available in ITFM tables only after the financial modeling process is completed	Other cost for business application	
Services cost	Quarter	Custom Script	ITFM product.	Data will be available	Services cost for	

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Preconfigured indicators and sources (continued)

Indicator name	Frequency	Type	Source	How is it calculated?	Description	Jobs
			ITFM_Allocation_Agg table	Data will be available in ITFM tables only after the financial modeling process is completed	Total business application	
Software cost	Quarter	Custom Script	ITFM product. ITFM_Allocation_Agg table	Data will be available in ITFM tables only after the financial modeling process is completed	Software cost for business application	
Application TCO	Quarter	Custom Script	ITFM product. ITFM_Allocation_Agg table	Data will be available in ITFM tables only after the financial modeling process is completed	Total application cost from all the buckets	
Application's Incident Count	Quarter	Custom Script	incident	Data will be available in the incident table only after the business application is associated to the incident.	Indicator that gets the count of all incidents associated to the business application tied to the scoring profile of which the indicator is part.	
Application's Instance – Incident Count	Quarter	Custom Script	incident	Gets incident count attached to all Application Instances, which are mapped to a business	Indicator that gets the count of all incidents associated with application instances. The application	

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Preconfigured indicators and sources (continued)

Indicator name	Frequency	Type	Source	How is it calculated?	Description	Jobs
				application and rolls it up to application.	instances, in turn, are associated to a business application tied to a scoring profile of which the indicator is a part. The incident count is calculated first at the application instance or application service level, and then it is rolled up to the business application level.	
Usage	Month	Query Condition	APM product. cmdb_ci_business_app table	Calculated from the **Active User Count** field	Number of user sessions and users for the application for a given fiscal period.	
Number of Incidents via Service	Daily	Performance Analytics	Mapped to **Performance Analytics** > **Indicators** > **Automated Indicators** > **Number of new incidents** Source = Incidents.New	Number of incidents opened today. Calculated from the Impacted Business Applications of the incident record.	Number of new incidents. Daily and historic data collection	[PA Incident] Daily Data Collection [PA Incident] Historic Data Collection

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Preconfigured indicators and sources (continued)

Indicator name	Frequency	Type	Source	How is it calculated?	Description	Jobs
			(Incident table)			
Number of Problems via Service	Daily	Performance Analytics	Mapped to **Performance Analytics** > **Indicators** > **Automated Indicators** > **Number of new problems** Source = Problems.New (Problem table)	Problems created today. Calculated from the **Service** field of the problem record.	Number of problems opened today. Daily and historic data collection	[PA Problem] Daily Data Collection [PA Problem] Historic Data Collection
Number of Changes via Service	Daily	Performance Analytics	Mapped to **Performance Analytics** > **Indicators** > **Automated Indicators** > **Number of new changes** Source = Changes.New (change_request table)	Number of changes with a registration date (change_request.opened_at) on collection date. Calculated from the Impacted Business Applications of the change request record.	Number of changes opened today. Daily and historic data collection	[PA Change] Daily Data Collection [PA Change] Historic Data Collection
Customer satisfaction (CSAT)	Quarter	Assessments	Assessment Metric Type: Customer Satisfaction Assessment Metric Category: CSAT		Template NPS	
Functional fit	Month	Assessments	Assessment Metric Type: Functional Fit		Template Net Promoter Score (NPS)	

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Preconfigured indicators and sources (continued)

Indicator name	Frequency	Type	Source	How is it calculated?	Description	Jobs
			Assessment Metric Category: Functional Fit			
Technical risk	Month	Assessments	Assessment Metric Type: Technical Risk Assessment Metric Category: Performance		Technical risk captured through survey for the fiscal period. Template NPS	
Technology Lifecycle Risk	Month	Custom Script	Assessment Metric Type: Functional Fit Assessment Metric Category: Functional Fit		Get the technology lifecycle risk of a business application for a selected fiscal period.	
Business value	Quarter	Assessments	Consolidation: Average		Template NPS	
Total change hours	Month	Performance Analytics	Mapped to **Performance Analytics** > **Indicators** > **Automated Indicators** > **Summed duration of closed changes** Source = Changes.Closed (Change_Request table) Fields: Opened, Closed	Script: Change.ClosedTimeID All Change Requests closed today considered	Summed Time taken of closed changes for an application for the given fiscal period. Time taken to close the changes in hours. Daily and historical data collection.	• [PA Change] Daily Data Collection • [PA Change] Historic Data Collection

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Preconfigured indicators and sources (continued)

Indicator name	Frequency	Type	Source	How is it calculated?	Description	Jobs
			State = Closed, Business Application = any of the Enterprise Architecture Business Applications, Closed today			

Note: Ensure the following system properties are set to True for Incident and Change indicators.

- To set the properties, navigate to All > System Properties > All Properties and search for the following properties:
  - Populate Impacted Services based on Affected CIs (com.snc.incident.refresh_impacted.include_affected_cis)
  - Populate Business Application related list for incidents (com.snc.incident.populate_business_application)
  - Populate the Business Application related list for change requests (com.snc.change_request.populate_business_application)
- To show up the **Impacted Business Applications** > **Related List** > **Additional actions** > **Configure** > **Related Lists** > **Impacted Business Applications** > **Available** > **Selected** > **Save**.
- To see the impacted business applications for the **Number of Incidents via Service** and **Number of Changes via Service** indicators, you must refresh the **Impacted Services and CIs** related list for that record. For instructions, see Refresh impacted services and CIs for Change and Refresh impacted services and CIs for incident.

Related topics

Assessments

Get started with Survey Management

Performance Analytic indicators to measure application performance

Use performance analytic (PA) indicators to know the count of incidents, problems, and changes logged against a business application and use this insight to improve the performance of your applications.

Enterprise Architecture uses indicators that are sourced from Performance Analytics (PA). These indicators give a count of incidents, problems, changes, and the number of change requests that were closed on a given day. Follow the given order to run the PA jobs at the scheduled time, and get the scores of the indicators to evaluate the performance of your business applications.

Order in which to run PA jobs and generate scores

You should run the scheduled jobs in the following order:

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1. [PA Incident] Daily Data Collection.
2. [PA Change] Daily Data Collection.
3. [PA Problem] Daily Data Collection.
4. [Enterprise Architecture Scheduled job] Load Application Indicators and compute Application Scores.

If there are historic data, then run them in the following order:

Note:

You require Performance Analytics Premium for Enterprise Architecture (com.snc.pa.premium.apm) plugin to retrieve historic data that are older than six months.

1. [PA Incident] Historic Data Collection.
2. [PA Change] Historic Data Collection.
3. [PA Problem] Historic Data Collection.
4. Regenerate Enterprise Architecture scores for required time period. This action deletes the existing scores including daily scores and generates new scores instead of just updating the existing scores.

Frequency at which indicator scores are generated

Scores are generated as per the scheduled run of the job that executes the script. If the indicator frequency is:

Monthly

scores are generated only on the last day of a month.

Quarter

scores are generated only on the last day of a quarter.

Yearly

scores are generated only on the last day of a year.

Note: Fiscal periods should be generated in the same time zone in which the scores are generated.

Collection of PA indicator score data

The period unit (days, weeks, or month) at which the PA indicator scores are collected and preserved depends on the frequency of the data source indicator. However, the frequency at which the application indicator collects the PA indicator data source scores varies.

In Enterprise Architecture, the frequency of the application indicator must be greater than or equal to the frequency of the data source indicator.

The following table describes the frequency at which Enterprise Architecture collects data from the data source indicators after the job runs:

APM data collection frequency

Enterprise Architecture frequency	Data source indicator frequency
Monthly	Monthly

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APM data collection frequency (continued)

Enterprise Architecture frequency	Data source indicator frequency
Quarterly	Monthly and Quarterly
Yearly	Monthly, Quarterly, and Yearly

If you are an Enterprise Architecture customer, who has upgraded to the Zurich release, then the **Daily** frequency of Performance Analytics data source indicator is not available. *RemoveDailyFreqAndUpdatePAIndicator* fix script automatically removes the **Daily** frequency of PA indicators and updates the frequency to **Monthly**.

Limitations to display application breakdowns in PA scoresheet

If there is a large number of business applications installed, then all the breakdowns are not displayed in the **Performance Analytics** > **Scoresheet**, as there is a limitation set in the system properties: *com.snc.pa.scoresheet.max_elements* and *com.snc.pa.scorecards.max_breakdown_elements*. To reconfigure the property limitation:

1. Navigate to **Performance Analytics** > **System** > **Properties**.
2. Enter the maximum number in the **Maximum number of elements of a breakdown in Scoresheet** field. The number must be greater than or equal to the number of business applications installed in your system.
3. Enter the maximum number in the **Maximum number of breakdown elements in scorecard lists** field.
4. Click **Save**.

Job schedule to compute application scores - Legacy

After you set up assessment indicators and scoring profiles, application scores are calculated by a scheduled job. Enterprise Architecture provides a predefined scheduled job that periodically recalculates application scores based on the assigned scoring profiles. An administrator can review or adjust the schedule from the Scheduled Jobs list if needed.

Understand how the system calculates application scores and create your application score profile per your requirements.

The assessment framework calculates the application score for each application on a scale of 1–10, where 10 is a good score and 1 is a low score. Assessments are based on various configured indicators, which you can configure. Each of these indicators periodically captures the related application data, which is used to derive the application score. These indicators with their respective value (weightage) are added to an application profile. The application is then associated with the application profile, which calculates the application score.

Normalization of application scores - Legacy

The indicators and their respective weights are used to calculate application score profiles for each configuration item. Use the score profile to calculate application scores and assess the applications. Apply these scores to compare applications and make strategic decisions about which ones to keep, replace, maintain, or invest more in.

The preconfigured indicators or the indicators that you created retrieve their related data based on the frequency set at the indicator definition stage. This data is captured in the **Application weight** column of the Application Indicator Score [apm_app_indicator_score] table. The **Target**

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maximum and **Target minimum** that are set while creating an application indicator are for calculating the applications normalized value.

Note: The **Target maximum** and **Target minimum** are not available when the data source is Assessments.

The normalized value of the application score, which is measured on a scale of 1–10, is derived from the following formula:

```
(Application Weight - Target minimum)/(Target maximum - Target
 minimum) * 9+1
```

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Note:

- If the **Target maximum** and **Target minimum** are not set, then the maximum value within the range of applications is taken as the target maximum value. Similarly, the minimum value within the range of applications is taken as the target minimum value.
- If the#**Target maximum** and#**Target minimum** are set and the **Consider Absolute Values** check box is selected, the entered values are considered.
- If the**Target maximum** and#**Target minimum** are set and the **Consider Absolute Values** check box is cleared, the values are considered based on the following intelligent logic.

```
Target maximum = Minimum value of (Target maximum value
 defined in the Indicator [apm_metric] table, Maximum value
 of Application Weights for the fiscal period)
```

For example, consider a scenario where:

- The application weights are 10, 20, 30,….., and 1000.
- Value entered in the Target maximum field is 100.

With these assumptions, the Target maximum value considered is 100, as the defined Target maximum value (100) is lesser than the maximum application weight (1000).

```
Target minimum = Maximum value of (Target minimum value
 defined in the Indicator [apm_metric] table, Minimum value
 of Application Weights for the fiscal period)
```

For example, consider a scenario where:

- The application weights are 10, 20, 30,….., and 1000.
- Value entered in the Target minimum field is 100.

With these assumptions, the Target minimum value considered is 10, as the defined Target minimum value (100) is greater than the minimum application weight (10).

- The **Target maximum** and **Target minimum** values are applied during normalization only when the indicator frequency matches the fiscal period being scored. If the frequencies don't match, the system uses dynamic normalization and derives the minimum and maximum boundaries from the actual application weights in the current scoring run.

  This behavior is intentional for indicators where raw values vary by fiscal period — for example, Performance Analytics indicators and Query Condition indicators that aggregate counts over time. For these indicators, applying a monthly target maximum to a quarterly or yearly aggregated value produces incorrect scores.

  For Query Condition indicators that read a static field value from the business application record — such as active user count — the raw value is the same regardless of the fiscal period. For such indicators, using the same absolute target values across all frequencies produces consistent and meaningful scores. However, because the system applies the same frequency-matching rule to all indicator types, absolute target values aren't used when the frequencies don't match.

The **Application Weight** that is lesser than or equal to the target minimum is given the lower score, which is 1.

The **Application Weight** that is greater than or equal to the target maximum is given the maximum score, which is 10.

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When you set the application indicators, you can also configure the **Direction** as Maximize or Minimize. The application with the maximum value gets the minimum score when the direction is Minimize. The application with the minimum value gets the maximum score when the direction is Maximize.

If the **Direction** in the indicator is **Minimize**:

```
(10 - above calculated Normalized value) + 1
```

Application profile weightage is then applied on the Normalized value to derive the **Indicator Score**:

```
Normalized Value * Weightage as in application score profile %
```

After the indicator score is calculated for each of the indicators, the application score is calculated by summing up all the indicator scores used in the profile.

If the source of the indicator is **Indicators** in the **Data source** field, then the application weight is calculated as the sum of the normalized scores of all its dependent indicators.

Note:

- The normalized score of the parent indicators is then calculated in a similar manner as it is calculated for all the other indicators.
- The normalized value, indicator score, application weight, target maximum, target minimum, and total weight are all rounded to two decimal places only.

In the figure, since the Cost and Incident indicators are set to minimize, the applications with lower costs and lower number of incidents have higher scores.

Normalized value and application score for an assessment - Legacy

If the source of the indicator is **Assessments** in the **Data source** field, then the Target maximum, Target minimum, Application weight, and Total weight values are considered as zero.

For a business application to be considered for scoring, it must be mapped to a respective application profile to which the indicator is associated. You can check the scoring profiles in the apm_application_profile list.

All the business application related Assessment Category Results having assessment groups created within a fiscal period are considered for calculating the score. You can check the assessment category results for a business application in the asmt_category_result list.

For an assessment group to be considered for computing scores, all the related assessment instances must be either in completed or cancelled state.

```
scaleFactor = (9/ scale factor on metric type)
```

```
appAsmtScoreSUM = SUM of ratings of category results groupedBY
 source for each assessment group
```

```
appWeight=((scaleFactor * appAsmtScoreSUM )+1;
```

```
Normalized value = total app weight of BA/appOccurences.
```

```
totalIndicatorsWeightage = the sum of all indicator weightage
 mapped to a scoring profile.
```

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```
appIndWeightage = weightage of the current indicator
```

```
Indicator Score = normalizedValue * appIndWeightage /
 totalIndicatorsWeightage
```

The app occurrence is the occurrences of a business application.

Visualization of application performance - Legacy

Visualization of the performance of applications in different dimensions on a bubble chart, in a dashboard, and in an application 360 view helps you to take decisions on the applications.

Having set up indicators and attaching application score profiles and running the scheduled job to calculate its scores periodically, your application scores are now ready for viewing.

- Use bubble charts to visualize your business application data plotted on a chart in three dimensions, which helps you to compare and evaluate applications based on their indicator scores.
- Use Application 360 to focus on the business applications that require your attention.
- Use Application Assessments dashboard to view the trends of indicators for different applications.

Related topics

View application indicator scores - Legacy

View all application scores - Legacy

Analyze application scores in a bubble chart - Legacy

Monitor performance, costs, and workloads in Application 360 - Legacy

Assess the performance of applications in the dashboard - Legacy

Application strategy - Legacy

Formulate your decisions and align them with your organizational goals as Enterprise Architecture collects metrics on applications across various dimensions.

An application strategy portal takes you through a step-by-step process to identify opportunities to cut down the cost and create strategies for applications. It helps you to:

- Decide which application to invest, consolidate, migrate, sustain, replace, or retire based on the organization goals, application score, or indicator scores.
- Create strategic goals and track demands and programs. For example, you can set a goal and create a program to cut down the capital expense (CAPEX) of an application by 40%.
- Estimate or determine the applications assessment scores. For example, if an application score is low because of low business value and low customer satisfaction, then you can initiate a demand to invest in the application.

Related topics

Create a goal for an application strategy - Legacy

Create a demand towards achievement of goal - Legacy

Create a program for an application goal - Legacy

Create a guided plan to execute a program - Legacy

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Guided plan to execute a program - Legacy

After you create a program, you can use the guided plan to formulate steps in executing the program that you have created.

Note:

You can use the guided plan to execute a program only when you activate PPM Standard (com.snc.financial_planning_pmo) plugin.

You can select a specific program by clicking the view link of the programs in the Opportunities & Solutions section of the Application Portfolio Management portal to open the guided program navigation page. The Program Navigation page guides you in creating a step-by-step plan to set a goal target, identify opportunities and create demands, and track the project.

The Program Navigation page is divided into these sections:

Fiscal Period

Select Fiscal Period to start planning is the fiscal period for which you set your goal, implement the demands, and achieve the target.

Program Steps

The section takes you through a guided step-by-step workflow to complete the tasks and achieve the target goal.

Step 1: Set Goal Contribution Target

Use the link to set the goal contribution target for the fiscal period.

Step 2: Identify Opportunities

Identify opportunities to meet the target by analyzing the application scores and indicator scores.

The Group Analysis page consolidates the application details by category and helps you narrow down target applications by filtering them with the application indicator scores and values.

Click open an application category. Based on the indicator scores in the bubble chart, you can create a demand to achieve your goal. Demand is an imperative rightful request created by demand managers and demand users. The user submits a demand and the demand manager approves the demand.

Assessment Period

Select Fiscal Period to start Analysis in the Group Analysis page is the fiscal period for which you have assessed the applications. Based on these assessments you can create goals and demands, and implement them for the planned fiscal period, which is **Select Fiscal Period to start planning**.

Filter Applications

Use the Filter Applications pane to filter the applications based on the application indicators and scores.

To clear all the existing filters in the **Filter Apps** column in one click, instead of clearing each filter attribute field individually, click **Clear all filters**. You can then set your filter criteria to sort the applications for display.

Application Categories

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The **Application Categories** section lists the applications by their category names and the number of applications that fall within each category.

1. Click the header of a column.
2. To sort the application categories in alphabetical or reverse alphabetical order, click the arrow that appears.
3. In the other application columns, click the arrow to list the values in either ascending or descending order.

   Sorting helps to find the information quickly in the list, display higher values first, and also group the applications that have similar values.

Bulb icon ( )

Lists the number of demands created, view them individually, and edit them in the demand form.

Step 4: Track Project

Track the status of the projects as the demands are approved and the projects are executed.

Program Overview section

Gives a brief summary about the planned start and end dates of the program, the manager who drives the program, the goal that is linked to the program with the target percentage set to achieve by the marked fiscal year. In addition, it also displays the following details:

- **Estimated Goal Contribution**: Estimated percentage of the goal that the proposed program targets to achieve.
- **Estimated % contribution**: Percentage of the goal targeted to be achieved in the selected planned fiscal period.
- **Number of impacted Applications**: Number of applications impacted by the program.

Demands Column

A stacked chart that represents the demands at the top layer and displays the number of demands created for the program. The middle layer displays and represents the number of demands that have been converted into projects. The bottom layer displays the number of projects created exclusively for the program, and not the demands that are converted into projects.

You can print the chart in any format using the Chart context menu at the top-right corner of the Demands Column.

Recent Demands

Displays the number and the name of the demands that are created for the program. To edit a demand, click the demand hypertext to open the demand in the Demand form.

If you have a long list of demands, then displaying all of them on the **Recent Demands** section may have a space limitation. Use the pagination preferences to display a short list and then click the arrows either to progress down or up the list of demands.

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Exploring Technology Reference Model - Legacy

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

Important:

Starting with the Xanadu release, the legacy Technology Reference Model module is moved to the Enterprise Architecture Workspace. To learn more, see Manage the Technology Reference Model in Enterprise Architecture Workspace.

Overview and benefits of a TRM

In your business enterprise, using an 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 to be used. You must define the software versions that are permitted for use in your organization. Also, you must have a way to explore when a non-permitted software is being used within the organization and in which business applications.

Use the TRM module in the Application Portfolio Management to do the following:

- Approve or restrict the use of a software product within the organization.
- Define how versions of the software can be used within the organization.
- Request an introduction of a new software or the business applications, as new requirements arise.
- Maintain TRM library for your organization.

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.

TRM Product Lifecycle

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

The TPM home page fetches all the business applications that are being 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 Review the TRM lifecycle status in the Technology Portfolio Management page - Legacy.

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TRM and other modules

Warning: TPM and TRM require installation of either SAM Foundation or SAM Professional. Before installing the SAM Foundation plugin, carefully review the Software Asset Management Foundation plugin migration documentation. Contact ServiceNow Support if you do not have either SAM Foundation or SAM Professional installed on your instance.

The TRM module uses a similar module to TPM 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 is not available for your instance.

Related topics

- Add or edit a TRM product request - Legacy
- Add or edit a TRM product lifecycle request - Legacy
- Request a TRM product using the TRM Catalog - Legacy
- Request a TRM product lifecycle using the TRM Catalog - Legacy
- Approve or reject a TRM product or product lifecycle request - Legacy
- Add or edit a TRM category - Legacy
- View and edit your product requests - Legacy
- View and edit your product lifecycle requests - Legacy
- Add or edit a TRM phase - Legacy
- Manage Technology Reference Model (TRM) technical debt - Legacy
- Review the TRM lifecycle status in the Technology Portfolio Management page - Legacy

Manage Technology Reference Model (TRM) technical debt - Legacy

Manage the TRM technical debts that are created for the products that aren't aligned with the TRM phases and standards.

Before you begin

Important:

Starting with the Xanadu release, the legacy Technology Reference Model module is moved to the Enterprise Architecture Workspace. To learn more, see Manage TRM technical debt.

Role required: sn_apm.apm_analyst

About this task

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 EA 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 is not defined in TRM or has TRM product lifecycles that restrict the usage of the software. To know how the technical debts are calculated, see Manage Technology Reference Model (TRM) technical debt - Legacy.

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Technical debts are created at two levels if any of the following conditions are met. The Level 2 is checked only if the system property *sn_apm_trm.is_product_life_cycle_tech_debt_enabled* is set to True.

- Level 1
  - If a product is associated with a business application, but isn't part of the TRM product list. (OR)
  - If a product is associated with a business application and part of the TRM products list, but has the TRM phase's production unapproved.
- Level 2
  - If a product is associated with a business application, is part of the TRM products list, and has the TRM phase's production approved but doesn't have any associated TRM Product life cycles. (OR)
  - If a product is associated with a business application and part of the TRM products list, has the TRM phase with production approved, and the TRM product lifeycle exists, one of the following cases is considered:

    Case 1: If the lifecycle full version of the Application Service Software Model is not empty.

    A technical debt is created if the following condition isn't met for a TRM Product lifecycle:

    - TRM phase with production approved AND
    - TRM product's TRM phase with production approved AND
    - Version matching the lifecycle full version of the application service software model record AND
    - Phase start date <= Today's date <=phase end date.

    Case 2: If the life cycle full version of the Application Service Software Model is empty.

    Technical debt is created if the following condition isn't met for a TRM Product Lifecycle:

    - TRM phase with production approved AND
    - TRM product's TRM phase with production approval AND
    - Version is/starts with (based on version operator and isSampPluginInstalled) version of the associated software model AND
    - The edition is/starts with (based on edition operator and isSampPluginInstalled) edition of associated software model AND
    - Phase start date <= Today's date <=phase end date.

Procedure

1. Navigate to **All** > **Enterprise Architecture** > **Technology Reference Model (TRM)** > **Technical Debts**.
2. Review the list of TRM products and associated business applications details.
   You can also view the reason for the technical debt.

Risk management for business applications - Legacy

Integrate Enterprise Architecture with Governance, Risk, and Compliance (GRC) to simplify the work of application owners and risk managers by identifying the risks associated with business applications and adding the controls necessary to mitigate the risks.

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ServiceNow® Enterprise Architecture integration with Risk Management enables you to determine the inherent and comprehensive risk on a business application and identify tasks to mitigate the risk.

ServiceNow® Enterprise Architecture integration with Policy and Compliance enables you to view the controls determined on a business application, verify whether those controls are compliant, and determine the tasks required to make the business application compliant with the controls.

The key benefits of this integration are:

- Reduces the time spent by risk managers and application owners on digital risks.
- Provides faster and efficient communication between the application owners and risk managers.
- Provides an overview of the digital risk posture of business applications.

High-level workflow of the GRC and Enterprise Architecture integration solution

The high-level workflow of the GRC and Enterprise Architecture integration solution is as follows:

1. A business application is created.
2. Based on the GRC Profile Generation scheduled job that runs in the background, GRC detects a new business application and creates an entity in GRC.
3. When the new application is created as a GRC entity, a new risk identification record is created.
4. The risk manager can modify the configuration record and determine the workflow of the assessment. After a risk identification configuration is published, the risk manager can modify only some fields in the configuration record.
5. A questionnaire is initiated to collect details about the application from the application manager.
6. The application owner responds to the questionnaire.
7. The risk manager reviews the responses and sends the questionnaire back if further information or clarification is needed.

   Note: The application owner's responses are retained when the questionnaire is sent back.

8. When the risk manager is satisfied with the responses, the inherent assessment is initiated based on the risk assessment methodology configuration in GRC. For more information, see Configure inherent assessment.
9. GRC maps the risks and compliance objects based on the entity types.
10. The risk manager reviews the information object mapping.
11. The system executes the recommendation engine based on the algorithm selected in the configuration.
12. The risk manager reviews and maps the recommended risks, policies, and citations based on the associated information objects.
13. The recommended controls based on associated citation policies and risks are associated.
14. The application owner manages the control life cycle by working with relevant stakeholders to implement controls.

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Related topics

Application risk assessment using Advanced Risk Assessment

Product lifecycle data on the timeline - Legacy

The lifecycle data of software models (of each full version) and hardware models depend on its type, phase, source, dates, and the associated risk. Understand the conditions and considerations applied to denote the software model risks on the timeline. This knowledge enables you to decode the characters on the timeline.

Lifecycle phases on the timeline

The timeline depicts two types of lifecycles, which are publisher and internal. The Publisher Lifecycle information that is shown on the pop-up of the timeline are retrieved from the Software Product Lifecycles [sam_sw_product_lifecycle] table for the software and Hardware Model Lifecycle [cmdb_hardware_model_lifecycle] table for the hardware. This information is denoted as characters such as S and I on the timeline. S, for example, denotes ServiceNow and I for Internal Lifecycle.

Note: Both the hardware and software models are together referred to as product model.

As a SAM user or software model manager, you can add the software product lifecycle to the software product lifecycle table. This table holds the information of the software product, its lifecycle type (internal or external), full version, lifecycle phases, start date of the phase, and the risk.

As a hardware model manager, you can add lifecycle data to a hardware model.

Note: The start date of a subsequent lifecycle phase marks the end of the previous lifecycle phase. Hence there is no phase end date specified in the lifecycle information pop-up.

If you do not want a lifecycle phase to be rendered on the TPM timeline, then set the **Active** flag of that software product lifecycle record to false. For example, you can have **General Availability**, **End of Extended Support**, and **End of Support** lifecycle phases as three records for **Oracle DB Server** software model in the Software Product Lifecycles list. However, if you do not want **General Availability** phase to be shown on the timeline, you can clear the **Active** check box in the Software Product Lifecycle form for that lifecycle phase record. As a result, the timeline starts with the End of Support phase. Although the lifecycle phase record exists for the software product lifecycle, the lifecycle data will not be rendered on the timeline. Because only active lifecycle records are considered and plotted in the TPM timeline.

Lifecycle sources on the timeline

The sources of the publisher and internal lifecycle types are generated externally and internally, respectively. The records that are created internally are marked as **I** on the timeline and you cannot edit such product lifecycle source. But, if the publisher is external and if there are more than one publisher source for the same product model, then you can configure your preferred publisher source using the field mapping functionality to the **Sequence** field in the Choices [sys_choice_list] table.

The timeline shows the publisher sources that fulfill the following conditions:

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- The publisher source with the least sequence number is prioritized and plotted on the timeline.
- If a product model has multiple publisher sources for its lifecycle phases, then the source with the least Sequence number alone is plotted on the timeline and the rest of the phases are not considered.
- The first alphabet in the name of the publisher source is plotted on the timeline. However, if there is more than one source beginning with the same letter, then the character is appended with a positive integer. For example, C1 for Central, C2 for Corporate.

Date range configuration for the lifecycle phases

If you are an admin user, then you can configure the date ranges.

1. To configure the date ranges, navigate to **System Properties** > **All Properties**.
2. Click *`startRangeOfTPMLifecycle`* property name to open the record.
3. Enter a positive value of your choice for the start range of TPM lifecycle in the timeline.
4. Click **Update**.
5. Click *`endRangeOfTPMLifecycle`* property name to open the record.
6. Enter a positive value of your choice for the end range of TPM lifecycle.
7. Click **Update**.

To know more about the Date conditions and the lifecycle phases of the record, see Date conditions.

Color-coded timeline to identify product model risks

- If there are internal as well as publisher records for a phase, then internal overrides the publisher for that phase.

- The last phase in the timeline takes the risk color and source of the previous phase that is not overridden.

Assessment form for risk and control information - Legacy

Risk managers use assessment forms to gather information about an application's risks and controls. System administrators must make the forms accessible through the business application so that application managers can respond.

Questionnaires initiated by risk managers are the basis for assessment forms sent to application managers to collect risk or control details about their applications. For information for risk managers about how to configure the business application form, see Configure the business application form for risk management.

For information for application managers about how to respond to the questionnaire, see the Respond to a risk assessment questionnaire and Take the control attestation survey topics.

Information portfolio - Legacy

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.

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Important:

Starting with the Xanadu release, the legacy information portfolio module is moved to the Enterprise Architecture Workspace. To learn more, see Exploring the information portfolio.

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.

Plugin activation procedure

CMDB plugin has the Information Object (cmdb_ci_information_object) CI. When 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

Create a data domain - Legacy

Create an information object referencing a data domain - Legacy

Relate a business application to an information object - Legacy

Relate the information object to the database catalog - Legacy

Relate a business application to another business application - Legacy

Domain separation and Enterprise Architecture (formerly Application Portfolio Management) - Legacy

Domain separation is supported in Enterprise Architecture. Domain separation enables you to separate data, processes, and administrative tasks into logical groupings called domains. You can control several aspects of this separation, including which users can see and access data.

Support level: Basic

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- Business logic: Ensure that data goes into the proper domain for the application's service provider use cases.
- The application supports domain separation at run time. The domain separation includes separation from the user interface, cache keys, reporting, rollups, and aggregations.
- The owner of the instance must set up the application to function across multiple tenants.

Sample use case: When a service provider (SP) uses chat to respond to a tenant-customer's message, the customer must be able to see the SP's response.

For more information on support levels, see Application support for domain separation.

How domain separation works in Enterprise Architecture

While domain separation in Enterprise Architecture is at the "Data only" level, there are a few factors to help you in your use of domain separation:

- Data can be domain separated.
- The domain column is present for base system application tables and Enterprise Architecture tables.
- Domains are created and domain-specific configuration is managed by instance owner.
- Tenant domains can manage their own application data.
- Application properties are tied to the domain.
- Business logic and processes can be domain-separated by instance owner. Business rules and policies can be created in specific domains by tenants.
- Business logic and processes can be administered by tenant domain.

Related topics

Set up domain separation for Enterprise Architecture users - Legacy

Enterprise Architecture (formerly Application Portfolio Management) Platform Analytics Solutions - Legacy

Platform Analytics Solutions contain preconfigured dashboards. These dashboards contain actionable data visualizations that help you improve your business processes and practices.

Platform Analytics Solutions

Platform Analytics data visualizations use Performance Analytics indicator data to show you data over time, helping you analyze your business processes and identify areas of improvement. With Platform Analytics Solutions, you can get value from Performance Analytics for your application with minimal setup. You can always create your own objects as well.

To enable the solution plugin for Application Portfolio Management, an admin can navigate to **System Definitions** > **Plugins** and activate the Performance Analytics - Content Pack - Application Portfolio Management plugin.

Predictive Intelligence for Enterprise Architecture (formerly Application Portfolio Management) - Legacy

The Predictive Intelligence for Enterprise Architecture uses machine-learning algorithms to predict, suggest, and drive the data outcome of the new application that is onboarded.

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The application similarity machine-learning solution predicts and suggests the category of the business application when you enter the name and the benefit of the business application in the Register a Business Application form.

Predictive Intelligence for Enterprise Architecture has the following benefits:

- Uses the data in your instance and hence the suggestions of the machine-learning solution are more accurate.
- Provides similarity definition for new applications based on the name and description of the existing applications in the Business Application table [cmdb_ci_business_app].
- Suggests categories for the application that you are onboarding to help you sort it into an appropriate category. It is important to categorize an application as it defines its purpose and key business function in the Enterprise Architecture inventory.
- Enhances the **Register a Business Application** feature offered by Business Application Lifecycle Management services.

Solution definitions for Predictive Intelligence of Enterprise Architecture

The solution definitions for the predictive intelligence of Enterprise Architecture are available in the Enterprise Architecture – Predictive Intelligence plugin (com.snc.apm.predictive_intelligence). For more information, see Activate Application Portfolio Management.

Solution definition for Enterprise Architecture

Solution Definition	Solution Type	Description
Business Application Similarity	Similarity	Predicts the **Category of the business application** field from the **Name of the business application** field and the description provided in the **Benefit of the business application** field.

Maintaining prediction accuracy

If your business applications table has more diversified data, then the chances of the machine-learning solution to collect and compare your existing records with new similar records are more. Therefore, the prediction results of categorizing the business application from the name and the description entered by the requester may be more accurate.

You can manage prediction drift by retraining the similarity definition of a business application similarity model provided by the base system. Once your machine-learning solutions are trained, you can call on the Predictive Intelligence API to make a solution prediction.

APM Predictive Intelligence Workbench - Legacy

The Enterprise Architecture (APM) Predictive Intelligence Workbench provides prebuilt use case templates that guide you through your predictive machine-learning implementation to create intelligent processes for business applications. Business process architects use prebuilt functionality, including pretrained models to get started with machine learning use cases.

The Enterprise Architecture Predictive Intelligence Workbench includes a prebuilt use case template that systematically guides you through the following process to add value to your business applications:

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- Creating and training new predictive models.
- Evaluating and testing the predictive models.
- Adding the predictive models to your business process.

Once you train your custom use cases, they are usable immediately. No prior knowledge or experience with artificial intelligence or machine learning is required when you use the Enterprise Architecture Predictive Intelligence Workbench.

This application includes templates with prebuilt guidance to assist you in creating, training, evaluating, testing, and producing, your unique predictive models.

Activation information

Activate the Predictive Intelligence for Enterprise Architecture (com.snc.apm.predictive_intelligence) plugin before using the Predictive Intelligence Workbench.

Exporting Application Portfolio Management data to Microsoft PowerPoint - Legacy

Generate and download the status reports from your Application Portfolio Management instance as a Microsoft PowerPoint file. You can share this report with stakeholders and teams for collaboration.

Stakeholders might not have access to the ServiceNow instance, or they might prefer using Microsoft PowerPoint to consume key information. You can convey critical application portfolio status and health details to stakeholders via Microsoft PowerPoint. Instead of collecting all the data manually, you can export the data from the ServiceNow instance to Microsoft PowerPoint.

Important: Export to PowerPoint is currently unavailable for customers in the FedRAMP, NSC DOD IL5, or Australia IRAP-Protected data centers, self-hosted customers, or in other restricted environments. Please check for availability updates in future releases.

You can export the following Application Portfolio Status data:

- Application Landscape
  - Application Portfolio by Install Type
  - Application Portfolio by Platform
  - Application Portfolio by Technology Stack
  - Application Portfolio by Category
  - Most Used Applications by Application Family
  - Application Portfolio by Install Type and Platform
- Capabilities Landscape
  - Capabilities by Assessment (Top Scoring Capabilities)
  - Capabilities by Assessment (Low Scoring Capabilities)

The Export to PowerPoint feature in APM uses the Export to PowerPoint for Application Portfolio Management plugin (com.snc.apm_ppt_export). This plugin depends on the base plugin Export to PowerPoint (com.snc.sn_ppt_export). Ensure that both APM and PowerPoint plugins are installed to use the Export to PowerPoint feature in APM. For more information about the base plugin, creating templates, and report types, see Export to PowerPoint for Strategic Portfolio Management.

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Related topics

Export data to Microsoft PowerPoint - Legacy

Configuring Enterprise Architecture (formerly Application Portfolio Management) - Legacy

Learn about the process required to set up Enterprise Architecture to gain a comprehensive understanding of the applications used in your organization.

Activate Enterprise Architecture - Legacy

An administrator can activate the Enterprise Architecture plugin (com.snc.apm).

Before you begin

Role required: admin

About this task

The Enterprise Architecture (com.snc.apm) plugin is the basic plugin for the application.

The Enterprise Architecture plugin activates the following related plugins if they are not already active:

Plugin	Description
Enterprise Architecture – Predictive Intelligence (com.snc.apm.predictive_intelligence)	To predict application category by applying algorithms like similarity on business applications related data.
Business Planner (com.snc.apm.business_planner)	To access the Business Planning portal.
Demand Core (com.snc.demand_core)	To activate the basic core components of Demand Management.
Fiscal Calendar (com.snc.fiscal_calendar)	To create and manage the fiscal calendar. **Note:** Only the Fiscal Calendar Type, Standard is supported.
Performance Analytics – Content Pack – Enterprise Architecture (com.snc.pa.apm) plugin	To view the following that are developed using Performance Analytics: • Analyses of applications in a landscape page • Application indicator scores in a dashboard • Application 360 This plugin activates the following two PA plugins: • Performance Analytics – Content Pack – Enterprise Architecture and Change Management (com.snc.pa.apm.change_request) plugin: To access performance analytics metrics of business applications associated with Change requests.

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Plugin	Description
	• Enterprise Architecture, Performance Analytics, Performance Analytics – Content Pack – Problem Management (com.snc.pa.apm.problem) plugin: To access performance analytics metrics of business applications associated with Problem Management.
Bubble Chart widget for Service Portal (com.snc.sp_workbench_widgets)	To access service portal components (widget and dependency) for Bubble Chart.
Tree map (com.snc.treemap)	Enables support for tree map view on any applications.

You require the following plugins for specific features in the APM module:

Enterprise Architecture – ATF Tests plugin (com.snc.apm.atf) plugin

To validate whether Enterprise Architecture works after you make any configuration change such as apply an upgrade or develop an application.

Read only roles for Enterprise Architecture plugin (com.snc.apm_read_roles)

To view or read records of tables that are used to retrieve data for reports and dashboards.

Enterprise Architecture Core plugin (com.snc.apm_core)

To register a new business application. The plugin is in base application and activating the Enterprise Architecture plugin (com.snc.apm) enhances the Register a Business Application feature to predict and suggest an application category using the machine-learning solution when you on-board an application in to the Enterprise Architecture inventory.

Domain Support – Domain Extensions Installer system plugin

To enable the domain separation feature for Enterprise Architecture.

Performance Analytics Premium for APM (com.snc.pa.premium.apm) plugin

To retrieve historic data that are older than six months.

Activate the following plugins for additional features:

PPM Standard (com.snc.financial_planning_pmo)

To activate an integrated set of applications for project portfolio management and IT software development.

Financial Management For APM (com.snc.financial_management_for_apm)

To integrate Financial Management with Enterprise Architecture providing preconfigured Business Application Costing cost model and cost indicators.

This plugin also activates the following plugin to enable Performance Analytics dashboards for Financial Management associated with Enterprise Architecture:

Performance Analytics — Content Pack — Financial Management for Application Portfolio Management (com.snc.pa.fm.apm).

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Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the plugin using the filter criteria and search bar.

   You can search for the plugin by its name or ID. If you cannot find a plugin, you might have to request it from ServiceNow personnel.

3. Select **Install** to start the installation process.

   Note: When domain separation and delegated Admin are enabled in an instance, the administrative user must be in the **global** domain. Otherwise, the following error appears: `Application installation is unavailable because another operation is running: Plugin Activation for <plugin name>.`

   You will see a message after installation is completed. For information about the components installed with a plugin, see Find components installed with an application.

What to do next

Use the **APM Guided Setup** to set up Enterprise Architecture.

Enterprise Architecture administration - Legacy

With the sn_apm.apm_admin role, you can classify the applications used in the business enterprise. You can also provide privileges to users to do specific tasks, set up indicators to assess application usability, and create bubble charts to help define strategies to maintain applications.

With administrative privileges, you can set up application classification attributes to group applications, users and roles to provide level of access and assign tasks, applications assessment indicators to assess applications, and bubble charts to recommend an application strategy. Such a setup helps you to classify your applications and maintain an inventory, provide privileges to users to do specific tasks, assess the application usability by its indicators, and recommend a strategy to plan and execute organization goals.

Enterprise Architecture (EA) (formerly Application Portfolio Management) and the CSDM framework - Legacy

Use Enterprise Architecture (formerly APM) 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.

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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 Use capability map for planning - Legacy.

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

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

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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 Manage the Technology Portfolio Management (TPM) in Enterprise Architecture Workspace.

Related topics

Exploring the CSDM model

Enterprise Architecture (formerly Application Portfolio Management) and CSDM tables - Legacy

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:

- 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 Portfolio Management.

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- 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 (formerly Application Portfolio Management) use case - Legacy

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.

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

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  - 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.

TPM use case

TPM 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, and matched with a software and hardware product model.

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.

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.

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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 (formerly Application Portfolio Management) considerations - Legacy

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.
  - 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

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provide IT support services). You can use business capabilities to rationalize and prioritize the cost of business applications and business services.

- Using Technology Portfolio Management: The Software Asset Management Foundation plugin provides life-cycle data that Technology Portfolio 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.

Application classification - Legacy

Classifying applications into groups and categories helps your organization track and compare the applications. You can identify relationships and redundancies between the applications more easily. You can also build a complete applications inventory and map the applications to the business functions.

Set up these attributes for classifying and grouping applications:

Application category

This attribute is mandatory. It is a grouping attribute which you can use to make application rationalization decisions. Typically you can use this attribute to group applications used in a business process or department. The applications can have overlapping or complementary capabilities, but they are a part of the same business function and must be reviewed together during an application rationalization exercise. The summarized information at the application category level enables you to compare applications within a category using various metrics.

Category group

This attribute is optional. It is a grouping attribute for filtering and reporting of application categories.

Application family

You can use this optional attribute to group the applications by the manufacturers classification of their products into various product suites.

Business Process

This attribute is an optional attribute that is primarily used for filtering and reporting. Level one (L1) of a business process is a high-level representation that outlines the business operations of an organization. Ideally L1 business process can be tagged. For example, Oracle Order Management can be tagged to the business process

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'Quote to Cash'. The detailed mapping between the application and the business processes can be created using the CI relationship.

Software Model

This attribute is available with the base instance and contains the specifications of the software such as the manufacturer, version, release date, and end of life date. Business application references the corresponding software model record to automatically pull in the software specifications.

To check out an application classification example, see Application Classification Example.

Add or edit an application category group - Legacy

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 group or edit an existing one to align it with your business requirements.

Before you begin

Important:

Starting with the Xanadu release, the legacy application category groups module is moved to the Enterprise Architecture Workspace. To learn more, see Manage application category groups.

Role required: sn_apm.apm_admin

Procedure

1. Navigate to **All** > *Enterprise Architecture* > **Administration** > **Application Category Groups**.
2. Select **New** to create a new category group or select the name of an existing category group that you want to edit.
3. Enter a name and description for the application category group.
4. Select **Submit** or **Update**.

Add or edit an application category - Legacy

An application category is a grouping of applications by their purpose and function, fields, or areas. Such a categorization helps you to consolidate applications and rationalize decisions. You can create an application category or edit an existing one to align it with your business requirements.

Before you begin

Important:

Starting with the Xanadu release, the legacy application categories module is moved to the Enterprise Architecture Workspace. To learn more, see Manage application categories.

Role required: sn_apm.apm_admin

About this task

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. **Application category** field is used to filter Analysis dashboards (2x2 matrix plotting business value versus technical risk).

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Procedure

1. Navigate to **All** > *Enterprise Architecture* > **Administration** > **Application Categories**.
2. Select **New** to create a new category or select the name of an existing category that you want to modify.
3. Enter a name and description for the application category.
4. If you want to add the category to a category group, look up and select the group from the **Category group** field.
5. Select **Submit** or **Update**.

Add or edit an application family - Legacy

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 create an application family or modify an existing one to align it with your business requirements.

Before you begin

Important:

Starting with the Xanadu release, the legacy application families module is moved to the Enterprise Architecture Workspace. To learn more, see Manage application families.

Role required: sn_apm.apm_admin

Procedure

1. Navigate to **All** > *Enterprise Architecture* > **Administration** > **Application Families**.
2. Select **New** to create a new application family or click the name of an existing family that you want to edit.
3. Enter a name and description for the application family.
4. Select **Submit** or **Update**.

Add or edit an application business process - Legacy

Business processes are a structured sequence of tasks that are grouped, helping to accomplish specific outcomes. You can create business processes or modify an existing one to align it with your business requirements.

Before you begin

Important:

Starting with the Xanadu release, the legacy business processes module is moved to the Enterprise Architecture Workspace. To learn more, see Exploring business processes.

Role required: sn_apm.apm_admin

About this task

Based on the requirements, the business capability hierarchy can be modeled using the business process relationship. You can edit the business process records using the CI relationships to create a business process hierarchy.

A business process or capability hierarchy is an ordered grouping of business processes in a hierarchical fashion. L0 processes signify the high-level process encompassing all activities

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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.

Procedure

1. Navigate to **All** > *Enterprise Architecture* > **Administration** > **Business Processes**.
2. Select **New** to create a new business process or select the name of an existing process that you want to edit.
3. Fill in the fields.
   For field information, see Business Process Form.
4. Right-click the form header and select **Save**.
5. If you want to add items to this business process, use the Related Items CI relations formatter.
6. Select **Submit** or **Update**.

Create an application portfolio - Legacy

A portfolio is a collection of related projects and demands. You can create a project and execute it to rationalize and modernize the application portfolio. Create a portfolio of applications, and set demands and goals to measure the effort and progress of several projects and also create reports on these projects for analysis.

Before you begin

Role required: sn_apm.apm_admin

Procedure

1. Navigate to **All** > *Enterprise Architecture* > **Administration** > **Portfolio**.
2. Click **New**.
3. Enter a name and description for the portfolio.
4. In the **Portfolio manager** field, search for and select the name of the manager for this portfolio.
5. Click **Create Portfolio**.

Add a strategy for managing applications - Legacy

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

Before you begin

Important:

Starting with the Xanadu release, the legacy demand actions module is moved to the Enterprise Architecture Workspace. To learn more, see Manage demand actions.

Role required: sn_apm.apm_admin

About this task

Create demand actions that are aligned to the application strategy.

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Procedure

1. Navigate to **All** > *Enterprise Architecture* > **Administration** > **Demand Actions**.
2. Click **New**.
3. Fill in the fields.
   For field information, see Demand Actions Form.
4. Click **Submit**.

Manage the life cycle of a business application - Legacy

Create or edit the life cycle of a business application to better manage the business application.

Before you begin

Role required: sn_apm.apm_analyst and sn_apm.apm_user

The application model (field name: Model ID) is important to create the application model lifecycle for a business application.

Starting from the Vancouver release, the application model is automatically created, and the Model ID is added to the business application while adding the 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** > *Enterprise Architecture* > **Application Portfolio** > **All Business Applications**.
2. Select the name of the business application to open the business application form.
3. In the Related Links section, select the **Application Model Lifecycle** tab.
   A list of life cycles associated with the business application is displayed.
4. Create or edit a life cycle.
   - To create a life cycle, select **New**.
   - To edit and existing life cycle, select **Edit**.
5. On the Application Model Lifecycle form, fill in the fields.

   For field information, see Application model lifecycle form.
6. Select **Submit**.

Related topics

Run a scheduled job to generate an application model for business applications - Legacy

Run a scheduled job to generate an application model for business applications - Legacy

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

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About this task

In Enterprise Architecture, 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.

Add a data classification group - Legacy

Create a data classification group to categorize data classifications.

Before you begin

Role required: sn_apm.apm_admin

Procedure

1. Navigate to Data Classification Group [cmdb_data_classification_group] table.
2. Select **New**.
3. On the form, fill in the fields.
   For field information, see Data classification group form.
   The applied tags are displayed in various colors on the top of the form.
4. Select **Submit**.

Add a data classification - Legacy

Create a data classification to apply it to an information object. Effectively control the data used by the business applications.

Before you begin

Role required: sn_apm.apm_admin

Procedure

1. Navigate to Data Classifications [cmdb_data_classification] table.
2. Select **New**.
3. On the form, fill in the fields.
   For field information, see Data classification form.
   The applied tags are displayed in various colors on the top of the form.
4. Select **Submit**.

Apply classification tags to an information object - Legacy

Apply data classification tags to an information object to get better visibility and control over the information objects data.

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Before you begin
Role required: sn_apm.apm_user

Procedure

1. Navigate to **All** > *Enterprise Architecture* > **Information Portfolio** > **Information objects**.
2. Open an existing information object.
3. From the Select classification tag list, select the appropriate tags to classify the information object data.
   For field information, see Information Objects form.
   The applied tags are displayed in various colors on the top of the form.
4. Select **Update**.

Schedule a data certification task - Legacy

Keep your business applications inventory up to date by certifying the data in the business applications table periodically. 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.

Before you begin

Important:

Starting with the Xanadu release, the legacy certifications schedules module is moved to the Enterprise Architecture Workspace. To learn more, see Managing requests, certifications, and assessments.

Role required: sn_apm.apm_admin

About this task
As an administrator with the Enterprise Architecture admin role, you can create and assign the data certification tasks to the system owners for them to certify the business applications data. You also require certification_filter_admin role to set filter to those fields that require certification.

Inventory of business applications is created one time. But the data on a business applications table are highly dynamic and keep changing over time. Therefore, it's imperative to keep the data complete, accurate, and current. Data certification is a platform feature that helps you to keep the data up to date.

The Enterprise Architecture (com.snc.apm) plugin installs the Data Certification (snc.certification_v2) plugin and requires no separate subscription.

The following preconfigured certification schedules are available for the administrator to schedule data certification tasks. The certification schedule generates a set of certification tasks based on set conditions.

- **Business Application Certification On Demand** / **Business Application Certification Quarterly**: Certifies the data in the Business Application [cmdb_ci_business_app] table. Use **Business Application Certification On Demand** to schedule as and when required, and **Business Application Certification Quarterly** for every quarter. Use either of the schedules according to the specified time interval or on demand.

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- **Application Service Software Model Certification On Demand**: Certifies the software model and full version fields in the Application Service Software Model [sn_apm_tpm_service_software_model] table.
- **Software Product Lifecycle Internal Source Certification on Demand**: Certifies the full version field in the Custom Software Product Life cycle [sam_custom_sw_product_lifecycle] table.

Procedure

1. Navigate to **All** > *Enterprise Architecture* > **Administration** > **Certification Schedules**.
2. Select **New** to create a new record of certification schedule.

   You can also select the preconfigured certification schedules to review the record and update the details, if necessary.

   For field information, see Certification Schedule form.
3. Select **Submit**.
4. Select **Update** to save the changes or **Execute Now** to execute the schedule.

   When you select **Execute Now**, a certification instance is created and as a system administrator you can view it in the **Certification Instances** related list. You can also track the certification instance and the percentage of its completion.

   Related certification tasks (to verify and certify the data of a business application record) are created in the **Certification Tasks** related list and is assigned to the application owner. As a administrator you can also track the data certification progress assigned to the application owner.

   When a certification task is newly assigned, reassigned, or is about to expire, you can notify the task owners about the pending status of the task at hand by an email.

   Preconfigured email notifications such as **APM DC task assignment**, **APM DC task reassign**, and **APM DC task expiry** are available that you can trigger depending on the certification task when you execute a schedule by selecting **Execute Now**.

   These email notifications are inactive by default, which you must activate by setting it to true.
5. To activate the email notifications, navigate to **Service Creator** > **Notifications**.
6. Select open the APM-related notification record.
7. Enable the **Active** check box to activate the email notification.

What to do next

You can review the certification tasks and update them if necessary.

View and update the application certifications - Legacy

A certification instance is a collection of certification tasks to execute a certification schedule. Review the application tasks that you created and update them if necessary.

Before you begin

Important:

Starting with the Xanadu release, the legacy application certifications module is moved to the Enterprise Architecture Workspace. To learn more, see Managing requests, certifications, and assessments.

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Role required: sn_apm.apm_admin

Procedure

1. Navigate to **All** > *Enterprise Architecture* > **Application Portfolio** > **Application Certifications**.
2. Click a **Certification Instance** in the Certification Instances list.
3. View and update the certification task details, if required.
4. Click a certification task in the **Certification Tasks** related list.

What to do next

You can view all the business applications that require certifications and belong to this specific certification task. As a system administrator you can also track the data certifying process and view the certification fields of the business application record that have been certified as checked and those that have failed in certification. The IT_application_owner certifies the certification fields.

Certify data in business applications table - Legacy

As an application owner with the certification role you can view the certification tasks assigned to you and certify the required fields. You can also update the data in the fields and then certify them.

Before you begin

Role required: certification_admin

Procedure

1. Navigate to **All** > **Data Certification** > **Tasks** > **My Tasks**.
2. Click the task number in the **Certification Tasks** list that requires your certification.
3. Click the check box to certify the fields.
   You can certify the data in the fields by any of the following methods:
   - Field wise by selecting the field level check box.
   - Column wise to certify the particular data element for all business applications by selecting the column level check box.
   - Row wise to certify all data elements for a particular business application by selecting the row level check box.
   - Entire table to certify all data elements for all business applications selecting the check box that selects all rows.
4. Click the field to update the data if it is not current.
5. Enter your comment for the fields that you have certified and click the green check mark to certify the checked elements.

   A message appears to confirm your certification.

Run audits to determine invalid and missing configuration data - Legacy

Run the scripted audits and desired state audit to determine invalid and missing information in the configuration data. These audits help you find the gaps in business capability, business application, software models, and the life-cycle information.

Before you begin

Role required: sn_apm.apm_admin

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About this task

You can identify records that have gaps in their relationship with other configuration items by running the scripted audits. Such gaps in establishing the following relationships cannot give you a realistic appraisal of the business capabilities and the business applications that they are tied to.

- Between the business capability and the business application
- Between the business application and the software models
- The software products with no life-cycle data

As a user with the sn_apm.apm_admin role, you require all the configuration items to be related appropriately to assess your business applications and to estimate and evaluate the business capabilities of your enterprise.

Procedure

1. Navigate to **All** > *Enterprise Architecture* > **Administration** > **Desired State Audits** or **Scripted Audits**.
2. Click the audit name.
3. Click **Run Audit**.

   Running the audits help you to do the following:

   - Identify the records that match the respective criteria.
   - Create tasks to address the disparity in the records.
   - Communicate to the owners of the IT business application, software model, and the business capability through an email notification to resolve the gap or certify the data.

   Application to facilitate addressing these notifications and to access the applications data, the IT business application owners, software model owners, and the business capability owners are granted the sn_apm.apm_user role. Users with this role can navigate to **Compliance** > **My Follow On Tasks** to update the data.

   Hardware Models with no life-cycle data

   The scripted audit retrieves records of hardware models that don't have life-cycle data, but are used by an application service and are related to a business application. The audit generates tasks and sends email notifications to the hardware model owner.

   Note: The system checks only the life-cycle data for production instances of the business application. That is, it doesn't consider non-production instances such as development and test instances.

   Software Products with no life-cycle data

   The scripted audit retrieves software model records for all product versions used by the business applications that don't have life cycle-data such as life-cycle type, its phase, beginning and end dates of the life-cycle phase, and risk. The audit generates tasks and sends email notifications to the software model owner.

   Note: The system checks for the life-cycle data only for production instances of the business application. That is, it doesn't consider non-production instances such as development and test instances.

   Orphaned business capabilities

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The scripted audit checks the CI relationship [cmdb_rel_ci] table for capabilities that have no parent capability or child capabilities, and capabilities without any business applications tied to it. A task is created and the owner of the business capability is notified through an email about the assigned task.

Business applications related to multiple business capabilities in the same hierarchy

The scripted audit checks the CI relationship [cmdb_rel_ci] table for a possibility where the same business application is tied to multiple business capabilities at the same level in the hierarchy. For example, BA1 is tied to Cap 1.1.2 and is also tied to Cap 1.1.2.1. You can understand the hierarchy level of the capability from the Business Capability [cmdb_ci_business_capability] table.

Business applications not related to any software model

The audit checks the CI relationship [cmdb_rel_ci] table for business applications that are not related to any software model. The scripted audit considers only the production instances of business services. A notification is sent to the IT application owner.

Note: The system checks only for production instances of the business application and doesn't consider non-production instances such as development or test instances.

Business applications not related to any business capability

The desired state audit checks the CI relationship [cmdb_rel_ci] table for business applications that are not related to any business capability.

Business Applications not related to any Information Objects

The desired state audit checks the CI relationship [cmdb_rel_ci] table for business applications that are not related to any information object. If an unrelated business application is found, a notification is sent to the IT application owner.

Business Application and Information Object relation not captured in relation attributes

The desired state audit checks the CI Relation Attributes [cmdb_rel_attributes] table for CI relationships between the business application and the information objects. If relationship attributes are not found, a notification is sent to the business owner.

CRUD information not captured for Business Application and Information Object relation

The desired state audit checks the CI Relation Attributes [cmdb_rel_attributes] table for CI relationships between the business application and the information objects. If relationship attributes are found but the qualifier properties information for CRUD is empty, a notification is sent to the business owner.

Information Objects not related to any Business Application

The desired state audit checks the Information Object [cmdb_ci_information_object] table for information objects that are not tied to any business application. You can run such audits on demand. If there is any unrelated information object found, then a notification is sent to the owner of the information object mentioned in the **Assign to** field.

In addition, whenever a certification schedule either On Demand or Quarterly is executed, a notification is shown on the Enterprise Architecture home page. For each certification schedule that is executed, a corresponding notification entry appears on the home page. The notification shows open certification instances that are not 100% complete. Conversely, the

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home page section doesn't display certification instances that are 100% complete and have not been generated at all.

Notifications are also shown for software models that are at high and moderate risks on the current date and within the next 90 days. The risk factors of software models tied to business applications that are related to production instances are only considered. Click the notification to open the related records from the software model table.

The scripted and desired state audit results are also posted in the Notification section of the Application Portfolio Management Home page. Click the notification to open the related tasks or the related data certification tasks.

Train the similarity solution for Enterprise Architecture to categorize applications while registering - Legacy

Train the business application similarity definition included within the Predictive Intelligence for Enterprise Architecture to suggest a category for a business application when it is being registered or on-boarded.

Before you begin

Ensure that the Enterprise Architecture – Predictive Intelligence plugin (com.snc.apm.predictive_intelligence) is activated.

The Business Application Similarity solution uses textual similarity to compare business application records. It analyzes the Name and Description fields of existing business applications and compares them with new or updated records. During training, the system builds a model using words and phrases from existing application records. When a new business application is registered or on-boarded, the system compares its text against previously trained records to identify applications with similar terminology and context. If the new application closely matches existing applications, the system suggests the most common category used by those similar applications.

Role required: ml_admin

Procedure

1. Navigate to **All** > **Predictive Intelligence** > **Similarity** > **Solution Definitions**.
2. In the Similarity Definitions [ML view], click the Business Application Similarity (ml_sn_sn_apm_ml_global_ba_similarity) label.
3. On the Similarity Definition Business Application Similarity [ML view] form, verify the default values for business application similarity.

   For more information on the Similarity Definition form fields, see Create and train a similarity solution.

   Note: Set the application scope to Enterprise Architecture – Predictive Intelligence to edit the form. Click the word here at the end of the warning message that appears.

Similarity Definition form

Field	Definition
Label	Unique name for your similarity definition.
Word Corpus	Collection of words and phrases related to the name and description of the business application that functions as the vocabulary

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Field	Definition
	the system uses to compare your instance records based on their textual similarity.
Processing Language	Dominant language of the dataset that you are training on the solution definition. If the dataset language is Italian, choose Italian. **Note:** English processing is applied to all datasets by default.
Stopwords	Existing word corpus that is relevant to your solution. You can also add stopwords to the list, for example, words like Application.
Training Frequency	Option to retrain from once daily or every 30 days in three months increments up to 180 days.
Update Frequency	Frequency at which you want to refresh the data you use to retrieve your similarity results.

4. Click **Update & Retrain**.

What to do next

You can create a similarity solution with words and phrases related to the name and description of the business application that triggers a prediction. You can also set a training frequency for your machine-learning solution to collect and compare existing records with new records for a similarity definition.

Use the similarity solution to categorize an application while it is on-boarded.

Suggest an application category based on similar business applications - Legacy

Use a Predictive Intelligence Workbench guided template that walks you through training the Similar Business Applications solution definition for finding similar business applications and suggesting an application category.

Before you begin

Role required: piwb_manager

Procedure

1. Navigate to **All** > **Predictive Intelligence Workbench** > **Use Cases** > **Create New from Template**.
2. Select the **Similar Business Applications** template.
3. Click **Start**.
   The use case setup window opens displaying the name and description of the use case.
4. Click **Take me there**.
   The **ServiceNow Machine Learning Solutions** page opens and displays all the available solutions.
5. Expand the Similarity solution to see the available solution definitions.

   Configure or train the Similarity solution for finding similar business applications.

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- To configure the Similar Business Applications solution definition (ml_sn_sn_apm_ml_global_ba_similarity), click **Configure**.
- To train the Similar Business Applications solution definition (ml_sn_sn_apm_ml_global_ba_similarity), click **Train**. For more information, see Train the similarity solution for Enterprise Architecture to categorize applications while registering - Legacy.

Configure script to customize risk calculation - Legacy

Configure the risk calculation script at the extension points where the risks bubble up to the next level. With such configuration, the risk engine ignores the default logic of risk calculation and looks for the custom logic.

Before you begin

Role required: script_include_admin

About this task

There are three API extension points, at which the risks bubble up to the next level based on the script.

You can configure the script at the following levels:

- sn_apm.productModelCustomRiskCalculation – Product model (hardware and software models) risk level from the risks parameters level: The level at which the risks bubble up from the risks parameters level to the product model risk level.
- sn_apm.AppBusinessServicesCustomRiskCalculation – Application service risk level from the product models risk level: The level at which the risks bubble up from the product model risk level to the application service risk level.
- sn_apm.BusinessApplicationCustomRiskCalculation – Business application risk level from the application service risk level: The level at which the risks bubble up from the application service risk level to the business application risk level.

Procedure

1. Navigate to **All** > **System Extension Points** > **Scripted Extension Points**.
2. Filter Application Portfolio Management applications in the **Application** column.
3. Click the API Name.
4. Scroll down to the Implementations section and click the extension point.
5. Click the preview this record icon () next to the **Class** field.
6. In the Script Include pop-up, click **Open Record** button.

   By default, the sys_id of the function returns **False** for each of the API name and the risk engine follows the APM logic in calculating the risk.

7. Configure the function to return **True** based on the sys_id of the API at the product model level, application service level, or business application level.

   The risk engine then calls the API for the custom logic and calculates the risk in line with this logic, which bubbles up to the next level of risk calculation.

8. Click **Update**.

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Run scheduled job to generate risk values - Legacy

The risks on the product model and business application is time dependent. Based on the external and internal lifecycles the risk changes every day, hence the risk must be calculated daily. A scheduled job is created that runs daily and calculates the risks of the software model and the business application.

Before you begin

Important:

Starting with the Xanadu release, the legacy Technology Portfolio Management module is moved to the Enterprise Architecture Workspace. To learn more, see Manage the Technology Portfolio Management (TPM) in Enterprise Architecture Workspace.

Role required: admin

About this task

Load TPM Risk Parameters and compute Application Service Risks scheduled job must be run daily to calculate the product model risk. The scheduled job executes the script generating the application service risk values. You can configure the time in the script as per your preference. Run the back-end job to get the real-time status of the applications risk and store the risk data in the business application risk table.

Procedure

1. Navigate to **All** > **System Definition** > **Scheduled Jobs**.
2. Select the **Load TPM Risk Parameters and compute Application Service Risks** scheduled job.

   Note:

   The job is inactive by default. Select the **Active** check box to run the scheduled job at the scheduled time.

3. Click **Execute Now**.

   a. To configure the time in the script, navigate to **System Scheduler** > **Scheduled Jobs** > **Scheduled Jobs**.
   If a job is active, then you can schedule a time to run the job.

   b. Select *Load TPM Risk Parameters and compute Bus*.

   c. Click **Configure Job Definition** related link.

   d. Click the link at the top panel to edit the record.

   e. Click **Execute Now**.

   After executing the scheduled job, the engine automatically stores the risk values in the Business Application Risk [sn_apm_tpm_business_application_risk] table. It updates the values in the table each time after you run the job.

   f. Navigate to *Enterprise Architecture* > **Technology Portfolio Management (TPM)** > **Business Application Risk Values**.

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g. View the risk record of each business application in the table.

The risk values are:

High

One or more than one associated application service is at high risk.

Medium

One or more than one associated application service is at medium risk.

Low

One or all the associated application services are at low risk.

Not Assessed

Either the business application does not have any application service associated to it or the associated application service is not of production type.

Result

The TPM risk engine loads the risk parameters, runs, and generates the risk parameter scores, software model risk values, hardware model risk values, and application service risk values.

What to do next

Navigate to the following tables to view the risk values and scores:

- Navigate to *Enterprise Architecture* > **Technology Portfolio Management (TPM)** > **Risk Parameter Scores** to view the scores of the risk parameters.
- Navigate to *Enterprise Architecture* > **Technology Portfolio Management (TPM)** > **Hardware Model Risk Values** to view the risks of the hardware models.
- Navigate to *Enterprise Architecture* > **Technology Portfolio Management (TPM)** > **Software Model Risk Values** to view the risks of the software models.
- Navigate to *Enterprise Architecture* > **Technology Portfolio Management (TPM)** > **Application Service Risk Values** to view the risks of the application services.

The risk values of the business applications, application services, hardware, and software models are rendered on the Technology Portfolio Management timeline.

Install Application Portfolio Management (APM) Cloud Assessment Application - Legacy

Install the APM Cloud Assessment application (app-apm-cloud-readiness) from#the#ServiceNow Store.

Before you begin

Role required: admin

Procedure

1. Navigate to the ServiceNow Store.
2. Search for#Application Portfolio Management Cloud Assessment application.
3. Click the application tile.

You can view detailed information about the application.

Note: Consider reading the **Requirements and Dependencies** sections, as applicable.

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4. Click **Get** and enter your Now Support login credentials.
5. Click **Buy**.
6. Enter the **Instance Name** and **Reason** for the instance and click **Validate Instance**.
7. Click **Request**.

   You receive an email with detailed installation instructions.
8. Log in to the instance on which you want to install the Application Portfolio Management Cloud Assessment.
9. Navigate to System **Applications** > **Applications**.
10. Locate the application, select it, and click **Install**.

What to do next

You can add or edit a business application to assign the Cloud Assessment scoring profile to a business application. After you apply the scoring profile, schedule a job to calculate application scores periodically. And you can view all application scores and analyze application scores in a bubble chart.

Schedule a job to compute application scores - Legacy

Enable the *Load Application Indicators and compute Application Scores* scheduled job to regularly compute the application and indicator scores.

Before you begin

Role required: admin

About this task

The job recalculates the scores of all indicators, the scoring profiles to which these indicators are attached, and the business applications that are associated to these scoring profiles.

The job generates scores for indicators according to the time period that is set in the **Frequency** field of the Indicator form. The job generates scores on the last day of the fiscal period set as frequency. That is, if the current day is the last day of the fiscal period, only then it generates the scores.

For example, if the **Frequency** option set for the **Functional Fit** indicator is monthly, then the scores for this indicator are generated on the last day of the month. If the frequency set for the **CSAT** indicator is quarter, then the scores for CSAT are generated on the last day of that quarter. Similarly, if the frequency for **Business Value** indicator is set as year, then the scores are generated on the last day of the year.

Note: If your frequency is yearly, then the scores of the indicators are generated on the last day of the year. Furthermore, scores are generated for the last quarter and the last month of the year as well, which are also inclusive of the last day of the year when the scores are generated.

However, if you want to generate scores, on demand, on any day and for a particular period of time, then you can generate scores using the **Regenerate Indicator score** option in the Indicator form of a particular indicator. This action does not update the existing scores but deletes them and generates new scores. See: Create or edit an indicator to assess an application. You can also use the **Regenerate scores** option of the Scoring Profile form that generates scores for all indicators attached to that scoring profile. See: Create an application score profile and attach profile indicators.

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Procedure

1. Navigate to **All** > **System Definition** > **Scheduled Jobs**.
2. Find and select the *Load Application Indicators and compute Application Score* scheduled job.
3. On the form, fill in the fields.
   For field information, see Scheduled Script Execution form.
4. Right-click the form header and click **Save**.
5. Click **Execute Now**.
   The job executes at the scheduled date and time.

What to do next

Understand what the job does and how the assessment framework normalizes the application scores.

Set up domain separation for Enterprise Architecture users - Legacy

Enterprise Architecture supports domain separation for managed service providers (MSPs) to protect the sensitive data of each customer. The protection also ensures inability to view business application data of one customer by another customer and also secures the data within the domain.

Before you begin

Role required: admin

Procedure

1. Install the Domain Support – Domain Extensions Installer system plugin to enable the domain separation feature forEnterprise Architecture.
2. Create an administrator role at each domain level.

   The administrator can only configure and run the scheduled jobs.

3. Create all your application portfolio data entities in the domain, specific to the enterprise, and not at the global level.
4. Create indicators at the domain level.

   Do not create them at the global level and reuse the indicators for every customer under the parent level. Data is not visible at the global level.

5. Create user groups and assign roles to users at the domain level, so that they can view only the data of the enterprise they belong to.
6. Execute jobs for domain separated data.

   You can execute scheduled jobs, certification schedules, and assessments of indicators and scores at the domain level using the Run as role. Configure the Scheduled Script Execution form layout to add the **Run as** field from the Context menu.

Run scheduled jobs for CMDB Query Builder reports - Legacy

Schedule a job to run at a scheduled time or on a recurring schedule for CMDB query. Ensure to do this action in global scope.

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Before you begin
Role required: sys_admin

Procedure

1. Navigate to **All** > **System Definition** > **Scheduled Jobs**.
2. Search and click the relevant scheduled job.
3. Select the frequency at which to run the scheduled job in the **Run** field.
4. Click **Execute Now**.

> **Note:** As a system administrator you must run these scheduled jobs from Global scope only.

Select and run the scheduled jobs for the following CMDB Query Builder reports that the base system offers:

- Business Capabilities provided by Business Application
- Application Services consumed by Business Application
- Business Applications providing a Business Capability
- Business Services provided by a Business Capability
- Business Applications using an Information Object
- Information Objects used by a Business Application
- Demands on a Business Application
- Projects on a Business Application

Schedule a job to generate TPM lifecycle data - Legacy

Enable the*#Populate TPM Discovered Technologies and Lifecycles* scheduled job to regularly compute the technology lifecycle risks.

Before you begin
Role required: admin

> **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.

Procedure

1. Navigate to **All** > **System Scheduler** > **#Scheduled Jobs** > **#Scheduled Jobs**.
2. Find and select the*#Populate TPM Discovered Technologies and Lifecycles* scheduled job.
3. In the **Next action** field, select a date and time to run the job.
4. Click#**Update**.

Result
The job will run as scheduled to generate the TPM lifecycle data.

> **Note:** You can also run the job on-demand. For details, see Run a scheduled job to generate TPM lifecycle data - Legacy.

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Run a scheduled job to generate TPM lifecycle data - Legacy

Run a scheduled job to fetch the technology lifecycle data for your technology portfolio.

Before you begin
Role required: admin

About this task
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, including end of support date, end of extended support date, and end of life date for your software and hardware models.

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.

Schedule a job to generate TPM technology risk - Legacy

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

About this task
The scheduled job populates the risk scores for business applications (BA), application services (AS), software products, and hardware models 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.

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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**.

Using Enterprise Architecture (formerly Application Portfolio Management) - Legacy

Learn how to use the features of Enterprise Architecture to identify business applications inventory, measure the applications by gathering metrics, evaluate the usage, and decide to maintain, replace, or retire the applications.

Add or edit a business application - Legacy

Use the Business application form to add the applications that your organization uses based on their functions and the business processes they fulfill. In Enterprise Architecture, add any business application that is used to assess and track costs, usage, business value, functional fitment, and risks.

Before you begin

Important:

Starting with the Xanadu release, the legacy business applications module is moved to the Enterprise Architecture Workspace. To learn more, see Add or edit a business application.

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.

Note: The Business Application form manages logical application information. Technology certifications and infrastructure components, such as servers, are maintained through related records including technology models, application services, and CMDB relationships.

Role required: sn_apm.apm_analyst

Procedure

1. Navigate to **All** > *Enterprise Architecture* > **Application Portfolio** > **All Business Applications**.
2. Select **New** to add a new application or select the name of an existing application that you want to edit.
3. On the form, fill in the fields.
   For field information, see Business Application Form.
4. Select **Submit** or **Update**.
5. To relate a business application to an application service using the CI relationship editor, select the Add CI relationship () icon in the **Related Items** section.

   Business applications are related to application services, and application services are related to servers and infrastructure through the CMDB. To associate servers with a business application, relate the application to an application service and verify the application service is linked to the appropriate servers in the CMDB.

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6. To view the roadmap of the business application and its related data, select **View Application Roadmap**.
   You have to activate the PPM Standard (com.snc.financial_planning_pmo) plugin to view the business application roadmap.
7. To get all the available and significant information of a business application, select Application 360.
8. To know the application cost in the last period, manage application cost as a percentage of total spend, determine its future trend, and provide a cost-effective business application, select **Application TCO**.

   Note:

   The link to the Application TCO dashboard works when you use the preconfigured **Business Application Costing** cost model. The integration works when you activate the Enterprise Architecture plugin (com.snc.apm) and Financial Management for APM (com.snc.financial_management_for_apm) plugin. By default, the Performance Analytics – Content Pack – Enterprise Architecture (com.snc.pa.apm) plugin gets activated as part of the Enterprise Architecture plugin (com.snc.apm) activation.

   For the Financial Management for APM (com.snc.financial_management_for_apm) plugin, reach out to one of the Partner Store Apps. Your ServiceNow implementation partner could help you with the Partner Store App details.

9. To raise a demand for the business application, select **Create Demand**.
   The Demand form that opens up populates the related business application in the **Business Applications** field.
10. To retrieve software models associated to the business application, select **Manage Technology Models**.
    It also retrieves the log of software models that the software models suggestion engine retrieved when the scheduled job was last executed.

    Operating system and technology certifications are derived from the Technology Reference Model (TRM). Use Manage Technology Models to associate approved software or operating system models with the business application. Certification status is determined by the lifecycle and compliance information defined in the TRM.

    Business applications are related to application services, and application services are related to the underlying servers and infrastructure through the CMDB. To associate servers with a business application, relate the business application to an application service.

11. To navigate to the timeline view of the business application and to view the timeline of all its associated epics, stories, enhancements, other stories, projects, and demands, select the additional actions icon () and configure UI actions to display the **View Application Backlog** button.

    Select the button to go to the Application backlog view of the timeline.

    For more information on this timeline view, see Application Backlog view.

What to do next

To have a complete view of the business applications, select the Application 360 dashboard.

View business application roadmap - Legacy

Use the graphical, high-level overview of the application roadmap to view the investments made in the business application.

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Before you begin

Note: Activate the PPM Standard (com.snc.financial_planning_pmo) plugin to view the business application roadmap.

The projects and demands must be tied to business applications for the investment portal view to work.

Role required: it_project_manager and sn_apm.apm_user

About this task

The application roadmap takes you to an investment portal of the business application. The portal is exclusive to Enterprise Architecture.

Procedure

1. Navigate to the Application Roadmap using one of the following options:
   - To view the roadmap of any specific business application, navigate to **All** > *Enterprise Architecture* > **Application Portfolio** > **All Business Applications**.
     a. Click the name of the business application to open it in form view.
     b. Click the **View Application Roadmap** button to open the business application record within a portal with all its investment details.
   - To view the roadmap of the applications that you own, navigate to **All** > *Enterprise Architecture* > **Application Portfolio** > **My Applications Roadmap**.
2. Use the widgets on the top panel to view the following details:
   - The total number of investments planned on the business application, which also indicates the number of projects and demands separately.
   - The total number of projects and demands that impact the business application in the current and future fiscal years.
   - The color-coded status of the projects and demands indicating high, medium, and low risks correspond to the colors red, yellow, and green, respectively.
3. To configure the view in the portal, click the configuration widget ().
   a. Select the check box in the ITEM COLUMNS to add the columns that you require. Clear the check box to remove columns from the portal view.
4. To save your configurations, click the save icon ().
   Your preferences are set when you open the investment portal the next time to view the application roadmap. The settings are retained not only for the original business application for which you configured, but also for any other business application that you open.
5. Use the **Overview** tab to view the:
   - Names of the projects and demands the application is tied to.
   - Program that the projects and demands are part of. Projects and demands may or may not be associated to a project.
   - Business units to which the projects and demands are attached.
   - Business capabilities to which the projects and demands render support.
   - Strategies and goals of the projects and demands.

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- Planned start and completion dates.
- Overall status of the projects and demands.

6. Use the **Timeline** tab of the portal to view the timeline in a:
   - Grid view that shows start and end dates, possible risks, and issues.
   - Gantt view that indicates the schedule of the projects and demands.

Related topics

Add or edit a business application - Legacy

Monitor business applications with the application landscape dashboard - Legacy

Associate suggested technology models to an application service - Legacy

As an application owner, you can run the software product suggestions engine to fetch software products. These models can be related to an application service instead of mapping them manually.

Before you begin

Important:

Starting with the Xanadu release, the Technology Portfolio Management module is moved to the Enterprise Architecture Workspace. To learn more, see Manage the Technology Portfolio Management (TPM) in Enterprise Architecture Workspace.

Role required: sn_apm.apm_user

The Enterprise Architecture user has read-only permission to access the following tables:

- Hardware [cmdb_ci_hardware]
- Hardware Model [cmdb_hardware_product_model]
- Hardware Model Lifecycle [cmdb_hardware_model_lifecycle]
- Software Discovery Model [cmdb_sam_sw_discovery_model]
- Software Installation [cmdb_sam_sw_install]
- Software Model [cmdb_software_product_model]
- Software Model Lifecycle [sam_sw_model_lifecycle]

Procedure

1. Navigate to **All** > *Enterprise Architecture* > **Application Portfolio** > **All Business Applications**.
   You can follow one of the following options:
   - Right-click the name of a business application and click **Manage Technology Models** option.
   - Click the name of the business application to open the record in the form view. Then click **Manage Technology Models** button.
2. Right-click the application service record in the Technology Models Retrieval Logs list.
3. Click **Fetch Product Models** option.
4. To fetch all the hardware models on which the business application runs, select the **Hardware Models Only** check box in the Fetch Product Models pop-up that opens.
   The technology models suggestions engine retrieves only the hardware models.

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5. To fetch all the hardware and the software, select the **Hardware and Software Models** check box.

   Note:

   The **Hardware and Software Products** check box appears when you activate Software Asset Management Professional (com.snc.samp) plugin.

   The hardware product models that are associated to the application service are listed in the Application Service Hardware Models [sn_apm_tpm_app_service_hardware_model] mapping table. The Technology Models Retrieval Logs [sn_apm_suggestion_engine_run_log] table lists the number of hardware models on which an application service runs. The software models associated to the application service are listed in Application Service Software Models [sn_apm_tpm_service_software_model] database table.

   By default, the technology models suggestion engine checks only the hardware and hardware installed with new software installs since the last run of the job. However, if you require the engine to check all hardware irrespective of its last run, then enforce a check on all installs.

6. Select the **Force Check All Installs** check box to check all hardware irrespective of the check until the last run of the job.

   The engine retrieves different application instances for that business application.

   Force Check All Installs option also scans and suggests updated software models when there are variations in the mapping between the discovery model and the software models. Variations occur when the software models are either updated manually or through normalization rules.

7. Click **OK**.

   In the Technology Models Retrieval Logs list, you can view the:

   - Progress of the engine in the **Percent Complete** column corresponding to the application service record. A message, `Progress Worker to Fetch models is submitted successfully for Attendance Management Service` is also displayed at the top.
   - Number of the software models that the engine suggests in the **Software Product Suggestions Count** column.
   - Number of hardware models on which an application service runs in the **Hardware Model Count** column.

8. Check the **Status** for the selected application service.
   The **Percent Complete** should be 100%. Or, click the information icon () to view the log status of the application service.

9. Click the application service record in the Technology Models Retrieval Logs list view.

   Retrieved Software Products tab lists all the software models retrieved from the associated hardware of the application instance in the Technology Models Retrieval view. You can also view the total number and names of the software models that the engine suggests associating with the application service.

10. Select the check box adjacent to the software model and click **Associate Software Products** action from the **Action on selected rows** list to associate the software product to the application service.

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The status of the software model changes to **Associated**. A record is created in the Application Service Software Products mapping table. You can also view the associated software products in the TPM timeline view.

When you run the job for the first time, all the extracted software products are in status **New**. However, the status of the suggested software product changes based on the actions taken on the previous run of the job.

In the Actions choice list below the software product list, you can select an action.

For information about the status of the software models, see Status of the Software models.

11. Click the **Application Service Software Models** tab to view the list of software models associated to the application service.
    To delete an application service software model record, select the record to mark for deletion and click delete in the **Action on selected rows** list. To associate an application service to a software model, see Associate an application service to a software model.
12. Click the **Application Service Hardware Models** tab to view the hardware product models that are associated to the application service.
    The Application Service Hardware Models [sn_apm_tpm_app_service_hardware_model] mapping table stores the data. To associate an application service to a hardware model, see Associate an application service to hardware model.

Assess business capability - Legacy

Assess the business capabilities within the indicator framework and based on the score you can make strategic decisions on the business applications that support the business capability.

Before you begin

Role required: sn_apm.apm_admin

About this task

Each business application and business capability have a unique identity as a configuration item (CI). Such a distinction helps to establish a relationship between these independent configuration items. The CI relationship helps to establish a parent-child relationship between business capability and business application, and business application and business capability.

The configuration items must be associated to a set of indicators to generate a weighted score for evaluation. Preconfigured indicators such as people, process, and technology are used to assess business capability.

The indicator scoring framework also supports scoring of business capability in addition to business application. Within this framework the preconfigured indicators including people, process, and technology, as well as the indicators that you have created, are evaluated to give the indicator scores. For business applications you can create multiple scoring profiles. Each scoring profile can contain multiple indicators. But for capabilities you can create only one scoring profile and not multiple scoring profiles.

Procedure

1. Create CI relationships or edit the existing relationships using CI relationships in the CMDB.
2. Relate business capabilities and business applications using the following pre-determined CI relationship types:

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Relationship types

Parent	Type	Child
Business Capability	Provided By::Provides	Business Application
Business Application	Provides::Provided by	Business Capability

Note: Both the business capability and the business application are configuration item entities.

The parent column of the capabilities table is used to create the capability hierarchy.

What to do next

Create a business capability and relate the capability to a business application using the CI relationship editor.

Create business capability and relate the capability with an application - Legacy

Business capabilities are the abilities of an organization to do an activity to fulfill its business goals. Align your organization goals with business capabilities by creating capabilities.

Before you begin

Important:

Starting with the Xanadu release, the legacy business capability module is moved to the Enterprise Architecture Workspace. To learn more, see Exploring business capabilities.

Role required: sn_apm.apm_admin

About this task

Use the Business Capability form to create and update a business capability. If you add a new capability, update an existing capability, delete a capability at a leaf node level, then the levels of all the capabilities and the leaf node in that hierarchy must be updated accordingly. Select the **Update Capability Level and HierarchyID** related link to update the levels in the hierarchy so that the capability map reflects the updates. The **Leaf Node** and the **Level** fields are rendered uneditable to you, yet you can view the level of the capability if it is at the leaf node and its position in the hierarchy.

Following are the conditions to update or delete a capability:

- When you add a capability, the level of the new capability in the hierarchy is automatically assigned based on the level of the parent capability that is attached.
- If a parent capability is updated in the hierarchy, then the levels of all its child capabilities are recalculated. Otherwise, a capability can only be updated of its name, description, or parent.
- While adding or updating a capability the total number of levels can't exceed more than six in the hierarchy. For example, the levels can be from 0 to 5, where 0 is the root level.
- You can delete capabilities that are at the leaf node level only. Or, a capability that does not have a child capability of its own.
- Don't create circular relationships. In creating a parent capability, a child capability can't be its parent.

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Procedure

1. Navigate to **All** > *Enterprise Architecture* > **Administration** > **Business Capabilities**.

   You can also navigate to **Organization** > **Business Capabilities**.

2. Select **New**.
3. Fill in the form fields.
   For field information, see Business capability form.
4. Select **Submit**.

   If a root or a level-0 capability is created or if the parent field of a capability is rendered null, then a message prompts you to run the business capability update levels job to recalculate the hierarchy IDs.

5. To make the **Hierarchy ID** field editable, navigate to **System Properties** > **All Properties**.

   a. Select the *use_business_capability_custom_hierarchy_id* system property in the sys_properties.list.

   b. Enter true in the **Value** field.

   c. Select **Update**.

   > **Note:** Since the hierarchy ID is customized, the system doesn't check for any conflicts in the number or value that you set.

6. To create child capabilities for the capability that you created, open the record and select **New** button in the **Capabilities** related list of the Business Capability form.
7. In the related links, select **Update Capability Level and HierarchyID** to update the levels in the hierarchy.
   Selecting the **Update Capability Level and HierarchyID** link executes the **Update Capability Level and HierarchyID** scheduled script. You can view the updated hierarchy in the capability map.

   If you had navigated to the Capability Hierarchy Map after updating the parent, order, or hierarchy ID but without running the update capability levels job, then a message prompts you to run the Update Capability Levels job and relaunch the page to render the capability hierarchy map with the latest change.

8. To relate the capability with an application, select open the business capability.
9. In the Related Items section of the business capability form, select the Add CI relationship () icon to launch the relationship editor and create the CI relationship.
10. Select the **Provided by (Parent)** from the Suggested relationship types section.
    The filter is automatically applied on the business application.
11. In the Configuration Items section, select the relevant business application.
12. In the Relationships section, select the CI relationship icon to create a new relationship with selected configuration items.
    The Provided by::Provides relationship is added in the Relationships section.
13. Select **Save and Exit**.

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What to do next

View capability based planning to understand the hierarchy of capabilities mapped with its related applications and plan investments in applications if the technology of the applications is at a risk.

Use capability map for planning - Legacy

Capability-based planning helps you to understand your business capabilities, and the business applications that support them, to achieve your business goals.

Before you begin

Important:

Starting with the Xanadu release, the legacy capability ratings module is moved to the Enterprise Architecture Workspace. To learn more, see Exploring a business portfolio.

Role required: sn_apm.apm_analyst

About this task

Capability map is a pictorial representation of the capability-based planning displaying capabilities in a hierarchy. The hierarchical structure helps you to easily drill down to the lowest level and identify major and minor gaps. With this map, you get a complete view of all the capabilities, the applications associated with each of the capabilities, and the indicator scores of each business application in association with the capability.

The capabilities are color-coded which enables you to identify, in a glimpse, those capabilities that have major, medium, and minor gaps. Since you have visibility of the business applications that support the capabilities, you can create goals, demands, or programs to improve the performance of the applications.

Procedure

1. Navigate to **All** > *Enterprise Architecture* > **Capability Ratings** > **Capability Map**.

   The left pane lists all parent capabilities in the hierarchy. 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, click the icon to expand and view its sub-capabilities at each level. This view is similar across Business Capability, Technology Risk, and also in Manage Capability Hierarchy views.

   The left pane also displays the total count of sub-capabilities below each parent capability, the total number of business applications directly related to each capability, and their capability score. Similarly, on expanding a parent capability, you can see the number of subcapabilities, the total count of business applications that are directly related to the sub-capability at that level.

   The right pane displays the overall capability summary of the business capabilities in your enterprise with the following details. It shows the overall capability risk summary if you toggle to the technology risk view.

   Capabilities

   Total number of business capabilities that are displayed in the list on the left pane. The total number of capabilities is displayed for both **Business Capability** and **Technology Risk** views.

   Leaf Capabilities

   Total number of capabilities at the leaf level (that has no child capabilities of its own) in all the hierarchies of the business capabilities listed in the left pane.

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Assessed

Total number of assessed business capabilities.

Not Assessed

Total number of capabilities that haven't been assessed.

Major Gap

Total number of capabilities whose scores falls within the range of 1-4.

The Technology Risk view displays the number of capabilities that use applications whose technologies are at a greater risk.

Medium Gap

Total number of capabilities whose scores falls within the range of 4-7.

For the Technology Risk view, it displays the number of capabilities that use applications whose technologies are at a medium risk.

No Gap

Total number of capabilities whose scores falls within the range of 7-10.

For Technology Risk view, it displays the number of capabilities that use applications whose technologies have no risk at all.

2. By default the overall summary of capabilities is displayed.
   Use one of the following choices to configure the view, and the details that you want to see in the capability map:
   - **Business Capability** view: Selecting **Business Capability** enables the scores view. It displays the capabilities and applications associated with it.

     With this view, you have the following search option:

     Fiscal period: Select a fiscal period to view the capability scores generated for that fiscal period. If the capability isn't assessed for the fiscal period, then is it displays as **Not Assessed**. Conversely, you must also select a fiscal period to view the capability details, otherwise the system alerts you with an error message.

   - **Technology Risk** view: Select the **Technology Risk** view to know the capabilities that are at risk due to their end of life or expired technologies. It displays the overall summary of business capabilities and the technology risk of each business application. It also shows the capabilities that are impacted as a result of the technology risk. The technology risk on the capability is derived from the technology risk on a business application.

     Enter Search Capabilities

     Use the **Enter Search Capabilities** field to enter a text and search a business capability that you're looking for.

     Legend ()

     Lists the categories in color legends and the corresponding description. Also lists icons used in the map.

     Create

     Select the list to create a demand, a goal, or a program for the capability that you have currently selected.

     Similarly, toggle over to the technology risk view to raise a demand, create a goal, or a program for the underlying technology of an application if the technology is at risk.

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Note: The Program option is available only when you activate the PPM Standard (com.snc.financial_planning_pmo) plugin.

Manage Capability Hierarchy

Enables you to create a level-0 capability, add a child capability, edit an existing capability, and also to delete a leaf-level capability in the capability map. You can manage all the business capability relationship in the UI without having to navigate to the Business Capability form to do these functions.

3. Expand each business capability to view the capability details and technology risk details. For more information, see View business capability details in capability map and View technology risk details in capability map.

View business capability details in capability map - Legacy

Use the capability map to assess capabilities on dimensions such as people, process, and technologies and plan investments accordingly. View the current trend of your business applications and plan to potentiate them by creating goals, demands, and programs and track their progress in the map.

Before you begin

Important:

Starting with the Xanadu release, the legacy capability ratings module is moved to the Enterprise Architecture Workspace. To learn more, see Exploring a business portfolio.

Role required: sn_apm.apm_analyst

Procedure

1. Navigate to **All** > *Enterprise Architecture* > **Capability Ratings** > **Capability Map**.
2. Select the **Business Capability** view.
3. Click each capability to view the sub-capabilities and their details.

The left pane of the map displays the capabilities along with the following information:

Number of sub-capabilities

At each capability level, the total count of sub-capabilities and their subsequent level of sub-capabilities is listed within brackets next to the name of the capability. That is, at the parent capability level, the total number of child capabilities and their direct child capabilities is listed.

Number of applications linked to the capability

The applications icon () displays the total count of applications that are related to that capability.

Capability score

The capability score for the business capability, rounded to two decimal places only, is displayed in a color-coded box next to the application count. The colors indicate:

- Major gap: red color, scores in the range of 1–4.
- Medium gap: orange color, scores in the range of 4–7.
- No gap: green color, scores in the range of 7–10.

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The capability is assessed for the selected fiscal period of the business capability and the score data is retrieved from the apm_app_score table.

The overall score of parent capability is the average sum of the scores of all the direct child capabilities. That is:

```
Score of parent capability = Score of all child
capabilities / total number of child capabilities
```

If the parent capability is not assessed and displays (n/a) instead of a score, then it means that all its child capabilities are not assessed. However, if one of the child capabilities is not assessed, then the parent capability score is calculated based on the scores of the other child capabilities that have been assessed.

Capability levels and assessment

The map displays capabilities up to six levels. The capability that is at the lowest level or the capability that does not have a child is called the **leaf** level. Only the leaf level capabilities are assessed on the dimensions of people, process, and technology. The capability in the hierarchy that does not have a parent is the level 0 or root capability.

The right pane of the map displays the details of the capability selected on the left pane, and all the business applications that are related to that capability.

Details

With the **Business Capability** view, all the data of the selected capability are displayed in the **Details** tab.

- **Capability**: Displays the name of the business capability that is selected. Click the capability name to navigate to the Business Capability form and view the record details of the selected capability.
- **Capability Score**: Displays the capability score of the selected business capability and the individual indicator scores based on the dimensions of people, process, and technology.

  Note: If the business capability is at the leaf level, with no sub-capabilities, then the capability score is clickable. On clicking the link, the CI Scores form opens to display the score of the business capability configuration item for the fiscal period selected in the capability map.

  Similarly, the indicator scores of People, Process, and Technology are clickable if they are for the leaf capabilities only. Clicking each of these links opens the Indicator Scores form of the business capability configuration item for the relevant indicator and the fiscal period selected in the capability map.

- **Project**: Displays the total number of projects that the selected business capability is part of. The project attached to a sub-capability rolls up to its parent. Likewise, the projects of all the sub-capabilities in a hierarchy rolls up to the root, level 0, capability.

  Clicking the number of projects opens the Projects form with the project details for the business capability.

- **Demand**: Displays the total number of demands created for the selected business capability. The demand created for a sub-capability rolls up to its

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parent. Like manner, the demands attached to all the sub-capabilities in a hierarchy rolls up to its root, level 0, capability in the hierarchy.

When you select a capability or a sub-capability in the left pane of the map, the total number of demands and projects created or added to the capability, sub-capability, or its technology is displayed on the right pane. Selecting a parent capability displays the consolidated total number of demands created either for the parent or for its child capabilities.

Clicking the number of demands opens the Demands form showing the demand details for the business capability.

- **Total Project Investments**: Displays the total amount invested on the selected business capability in the selected fiscal period. Total project investments are the consolidated amount of investments made on the capability through one or more projects. You can create a project to achieve an objective of one or more business capabilities. Similarly, you can have a business capability tied to more than one project to achieve the goal of the business capability.

  Note: The Project and Total Project Investments details are available only when you activate the PPM Standard (com.snc.financial_planning_pmo) plugin.

  If a project is created to achieve the goals of any two business capabilities, then the **Total planned cost** of the cost plans attached to the project is split equally between the two business capabilities. For example, if $100 is invested on project P1, which impacts business capabilities BC1 and BC2, then the invested amount of $100 is split as $50 each between BC1 and BC2, respectively.

  The investment made on a child capability rolls up to its parent. Likewise, the investments made on all the sub-capabilities in a hierarchy rolls up to the level 0 capability in the hierarchy.

Business Applications

Displays the names of the applications that are directly and indirectly related to the capability and their overall scores.

Directly related applications are those applications that are directly related to the capability. Indirectly related applications are those applications that are related to another capability in that capability hierarchy. That is, the application is related to either any of the parents or any of the children in that hierarchy.

Both the **Business Capability** and **Technology Risk** views have the option to display direct and indirect business applications. However, the details displayed regarding the applications slightly vary.

Business Capability view: Displays the names of the business applications on the right pane, which are related to the selected business capability on the left pane, and the overall score of each individual application.

Click the business application hypertext to navigate to the Business Application form and view the record details.

Click the information icon () of an application to view the following details:

- **Project Investments**: Displays the total amount invested in the selected business application for the stipulated fiscal period. Project investments are the consolidated amount of investments made on a business application through one or many projects. You can create a project to fulfill an objective of one or

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more business applications. Similarly, you can have a business application tied to more than one project to achieve the goal of the business application.

If a project impacts one or more business applications, then the **Total planned cost** of the cost plans attached to the project is split equally among the business applications. For example, if $100 is invested on project P1, which impacts business applications, BA1 and BA2, then the invested amount of $100 is split equally as $50 each between BA1 and BA2, respectively. Similarly, you can invest in one or more projects that can be tied to one business application (BA1). The invested amount is split equally among the applications tied to each of these projects. The resultant consolidated amount from different projects is the project investment of the business application (BA1).

Note: The Project Investments and Projects are available only when you activate the PPM Standard (com.snc.financial_planning_pmo) plugin.

You cannot roll up cost in the case of business applications as it is an independent entity and is not hierarchical, whereas investment rollup is possible in business capabilities.

Project investments cannot be made for both business capability and business application within a project. Total planned cost of a project is considered either for business capabilities if you are investing in business capabilities or for business applications if you are investing in business application, and not for both.

- **Production Instances**: Number of application services of the production type that the business application is related to.

  The data is retrieved from the CI Relationships [cmdb_rel_ci] table based on the consumes::consumed by relationship between the business application and the application service.

- **Demands** and **Projects**: The number of demands and projects created at the business application level.
- **Score indicators**: The number of indicators on which the business application is assessed. It also displays the individual score of each indicator.
- **Capabilities supported**: Scrolling down in the pop-up you can also view the number of capabilities the business application supports and the name of each of the capabilities.

  The association between the business capability and the business application is based on the provided by::provides relationship type in the CI relationships table.

Use the pagination option to display business applications attached to the business capability that you select on the left pane. You can view a maximum number of 10 business application records related directly and indirectly to the capability. Click the left or right arrow to continue to view the previous or next set of records. The pagination option is available for all levels of a capability. The option is helpful to view the business applications of all the capabilities consolidated at the root level capability, especially when there are many applications attached to it.

Services

The tab displays the names of the services that are related to the selected parent business capability on the left pane. You can sort services in alphabetical or

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reverse order, search for a service, and view only a selected number of services using the pagination option.

Click the service hypertext to navigate to the service record and edit the record. The business capability is related to the service by establishing Provided by::Provides CI relationship.

What to do next

View technology risk details in capability map

Related topics

Create business capability and relate the capability with an application - Legacy

View technology risk details in capability map - Legacy

Use the technology risk view of the capability map to know the risk profiles of the technologies that support the business capability.

Before you begin

Important:

Starting with the Xanadu release, the legacy capability ratings module is moved to the Enterprise Architecture Workspace. To learn more, see Exploring a business portfolio.

Role required: sn_apm.apm_analyst

About this task

Enabling the **Technology Risk** view displays the number of underlying technologies of the selected business capability that are at low, medium, and high risks.

Procedure

1. Navigate to **All** > *Enterprise Architecture* > **Capability Ratings** > **Capability Map**.
2. Select the **Technology Risk** view.

The **Technology Risk** view displays the business capabilities (on the left pane) with the overall capability risk summary (on the right pane). Expand the parent capability to view its sub-capabilities and its associated risk details on the right pane.

Details

The tab shows the number of technologies underlying the selected capability at high, medium, and low risks. Click the capability name to navigate to the Business Capability form and view the record details of the selected capability.

Business Applications

You can view the technology risk at a business application level. The risk profile of the business application is stored and retrieved from the Business Application Risk [sn_apm_tpm_business_application_risk] table.

- Click the information icon () of an application to view the number of capabilities the business application supports and the names of the capabilities.
- To view the application record details, click the business application hypertext and navigate to the Business Application form.

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- Click the view list of related technologies icon () to navigate to the Technology Portfolio Management timeline view to view the risk profile of the business application. Filter the applications to take an active measure on the underlying technologies that are at risk.

Services

The tab displays the names of the services that are related to the selected parent business capability on the left pane. You can sort the services in alphabetical or reverse order, search for a service, and view only a selected number of services using the pagination option.

Click a service hypertext to navigate to the service record form to edit the record. The business capability is related to the service by establishing Provided by::Provides CI relationship.

Manage capability hierarchy in the capability map - Legacy

Create a root-level capability, add a child capability to a parent, edit a capability, and delete a leaf capability, and manage the relationships between the capabilities in the capability map.

Before you begin

Important:

Starting with the Xanadu release, the legacy capability ratings module is moved to the Enterprise Architecture Workspace. To learn more, see Exploring a business portfolio.

Role required: sn_apm.apm_user

About this task

When you add a child capability or update its order in the hierarchy, you can view the effect of your changes immediately in the hierarchical tree view of the capability map by refreshing or reloading the page. Whereas, when you add or edit a level-0 capability the **Update Business Capability Levels** scheduled job that updates the business capability levels is automatically executed to update the order and hierarchy of the capabilities in the map. Updating your business capabilities in the capability map saves your time and gives quick access to the updated data in the map.

Procedure

1. Navigate to **All** > *Enterprise Architecture* > **Capability Ratings** > **Capability Map**.
2. Click **Manage Capability Hierarchy** button.
   The capability map opens up in the edit mode.
3. To create a level-0 capability, click **New Capability** button.
4. On the form, fill in the fields.
   For field information, see Business capability record form.
5. Click **Submit**.
6. To add a child to a root capability, click the ellipses () icon adjacent to the root-level business capability for which you intend to add a child capability.
7. Click the **Add Capability** button and fill in the Business Capability New Record form fields.

   Note: The **Parent** field is auto-filled with the name of the selected root capability.

8. Click **Submit**.
9. To edit a capability, click the icon adjacent to the root-level business capability.

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10. Click the **Edit Capability** button and fill in the Edit Business Capability form fields.

    Note: The **Name** field is auto-filled with the name of the root capability. You can do the following with the edit option:

    - Edit the name and description of a capability.
    - Move a root-level capability as child capability in a different hierarchy.
    - Edit a child capability to make it as a new root-level capability.
    - Move a child capability from one root to another root.

    You can either enter a new name or keep the same name to the capability and add a parent to move the root-level capability from the existing hierarchy to a different hierarchy as a child capability. In a business scenario, this functionality is especially useful when you have to move a business capability from one business unit to another. For example, if your organization decides to move the Reward and Retain employees business capability from Finance to HR, then the business capability (along with its child capabilities) can be moved from Finance and appended in the HR business capability hierarchy.

11. Click **Submit**.
12. To delete a leaf capability, go to the leaf capability click the icon adjacent to the leaf capability.
13. Click the **Delete Capability** button.

    Note: The **Delete Capability** button is available only for a leaf-level capability. A leaf-level capability is the one that does not have a child of its own.

14. Click **Delete**.

    Note: Delete action removes the capability from the business capability [cmdb_ci_business_capability] table. It also removes the relationship that the capability has with the other configuration items in the CI relationship table.

15. Refresh or reload the page, for the map to reflect the changes that you made.

View technology risks in timeline - Legacy

View the internal and external life-cycle phases of all technologies or the product models that are used in your organization in the Technology Portfolio Management timeline. You can identify the stages at which the technology is, in terms of the risk factor by their color code.

Before you begin

Important:

Starting with the Xanadu release, the legacy Technology Portfolio Management module is moved to the Enterprise Architecture Workspace. To learn more, see Gantt view of TPM and TRM lifecycle timelines.

To view your data in the TPM timeline view:

- Create an inventory of business applications.
- Relate the business application with an application service.
- Associate the application service with the software models.
- Associate the application service with the hardware models.

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The Enterprise Architect (EA) can use the timeline view to track the versions and life cycles of technologies, and the number of applications running on those technologies. EA can assess risks on a business application due to its end of life, and create demands and projects as needed.

The lines in the TPM screen indicate the life cycles of the product models. The lines are color coded, which indicates the stages of risk the software model is in, at that quarter or year.

Note: In the context of Enterprise Architecture, business services are referred to as application services. Application services are created based on the service [cmdb_ci_service] table.

Role required: sn_apm.apm_user

Procedure

1. Navigate to **All** > **Enterprise Architecture** > > **Technology Portfolio Management (TPM)** > **Technology Lifecycles**.
2. Select a view grouped By Business Application, By Product Classification, By Software Model, or Application Backlog.
3. By default, the **Quarterly** button is enabled to show the timeline for the four quarters of a year.

   See views in TPM timeline.

   Click the **Monthly** button to toggle and view the timeline across all the months in a year. The monthly view helps you to track the risk stage of an application for any specific month in a year.
4. Click the production icon () to view the production instances that are liable to risks in the current quarter or month.
5. The lifecycle data sources of software models can be displayed in either of the following two ways:

   - To display the lifecycle data sources of a particular software model, click the expand icon () of the software model.
   - To display the lifecycle data sources of all software models related to a business application, click show all lifecycle data sources icon (). Use the icon to toggle between show and hide the data sources.

   You can view the timelines of life-cycle data sources in By Business Application, By Product Classification, By Software Model views, and Application Backlog view. All available sources for a software model are queried and retrieved from the Software Product Lifecycle [sam_sw_product_lifecycle] table. The Choices [sys_choice_list] table lists all the sources of the software models corresponding to the Software Product Lifecycle [sam_sw_product_lifecycle] table.

   The sources of software life-cycle data can be internal and can also come from multiple external sources. The life-cycle phase information of the internal data with one external publisher data, with the least sequence number from the Choices [sys_choice] table, is collated and displayed for each of the software models in the timeline. The other external publisher data sources, if present, are not shown in the timeline. Moreover, the overlapping of internal and the external publisher information in the software model timeline can make the phases indistinguishable between the two sources.

   Showing all lifecycle data sources helps in displaying all the publisher data sources for the product model as separate timelines instead of one with the least sequence number. The life-cycle information for each of the sources, whether internal or external, are shown separately. In the presence of more than one external publisher source, the sources displayed are in

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alphabetical order. As the life-cycle phase information is not merged or collated, the phase details for each source are comprehensible on the timeline.

6. Click the legend icon () to understand the indications of the markings on the timeline, and the color-coded lines.
   The gradation in color denotes risks, gradually phasing out from one stage to the phasing in of the next stage. You can view the legend for projects only when you activate the PPM Standard (com.snc.financial_planning_pmo) plugin.
7. Click **Create** list to create a demand or a project.

   Note:

   Project in the list appears only when you activate the PPM Standard (com.snc.financial_planning_pmo) plugin.

8. To view and edit the application services, hardware and software models, projects, and create demands associated with the business application, click to expand a business application in the **Application** column.

   See Perform application-related tasks from timeline.

   Note:

   You can create a project for a business application only when you activate the PPM Standard (com.snc.financial_planning_pmo) plugin.

9. Point to the risk bubble in the **Risk** column to view the risk of each business application.

   You can also view the underlying technology risk status of a business application in the By Business Application view.

   Risk information is retrieved from the business application risk table.

   Risk is calculated for all business applications that are active. A business application that consumes an application service is said to be active, and the relationship between the two is established in the CI Relationships [cmdb_rel_ci] table. The engine evaluates the risk of each application service (of production type only). It also evaluates the risks of all the application services consumed by a business application collectively from the Application Service Risk [sn_apm_tpm_business_service_risk] table. If the risk of any one of the application services is at a higher level, then the overall risk is high.

   Formerly business application risks were calculated dynamically while loading the TPM timeline. To reduce the load to the risk engine, the engine now calculates the risk of each business application and stores the information in a Business Application Risk [sn_apm_tpm_business_application_risk] table.

   Run the Load TPM Risk Parameters and compute Application Service Risks scheduled job daily to obtain the risk status of the application services on which the business applications run.

10. Click the risk bubble of a software model to view the scores at the risk parameter level.

    You can configure the scripts of the preconfigured risk parameters to evaluate your own risk values, which are stored in the Risk Parameter Score [sn_apm_tpm_risk_param_score] table.

11. Click the risk bubble of a hardware model to view the breakdown of its risks.

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12. Use the pagination option to populate the first 15 business applications, along with their related application services and software models.
    As a maintenance user, you can configure it to load up to 20 or 25 business applications in the Application column.
    a. Navigate to **System Properties** > **All Properties**.
    b. Click *sn_apm.noOfBusinessAppsPerTPMPage* to update the value.
    c. Click **Update**.
13. Click the life-cycle phase icon () on the hardware or software timeline to view the life-cycle information of the hardware or software model in a pop-up.

    The vertical line on the timeline indicates the current quarter that you are in. See Software product lifecycle data on the timeline.

Multiple views in TPM - Legacy

Multiple views within a TPM timeline screen facilitate users to view the risks of business applications in the way they want. Views can be a simple list of applications, categorizing the applications by products based on their functions, or by the underlying technology of the applications.

In each of these views, you can drill down to the respective underlying application service that is supported by the application, the underlying technology on which the application runs, or the business application that is used.

By Business Application view - Legacy

The By Business Application view displays all the software models and hardware models that are tied to the application services of a business application.

If CSDM v4.0 is implemented, the By Business Application view displays the **Business Applications** > **SDLC Components** > **Application Services** > **Hardware Models**, and **Software Models** or the technology structure in a succession. If CSDM v4.0 is not implemented, the By Business Application view displays the **Business Applications** > **Application Services** > **Software Models**, and **Hardware Models** or the technology structure in a succession. You can also view the applications by their manufacturers (for example, Oracle, SAP).

In the By Business Application view, you can do the following:

- Use the business application risk filter to filter the business applications based on their risk factor. By default, the timeline view displays business applications with production instances that are of **High Risk**. Select **Show All Risks** option to display business applications with all types of risks (high, medium, low, and not assessed). You can also filter business applications that have not been assessed. Based on the filtered criteria, you can view most or all business applications in the **Application** column.
- Use the filter icon ( ) to search and filter applications using any attribute that is present in the business application table. Use the condition builder in the Set Business Application filter dialog box to define the filter. You can set as many conditions that you may require to filter the records appropriately using the **New Criteria** button. If you log in again with the same user credentials, your filter preferences are saved for future, unless you edit or clear the filter conditions.
- Add a new demand or project to the business application. Point to the business application and click the add new project or demand icon ( ) that appears next to the application name.

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The demand or the project form has the name of the business application populated in the **Business Applications** field for which you are creating the demand or project.

Note: You can add a project to the business application only when you activate PPM Standard (com.snc.financial_planning_pmo) plugin.

By Product Classification view - Legacy

With the By Product Classification view, you can see the technology **Category** > **Software Models** > **Business Applications** > **Application Services** structure in a succession.

This view also lists applications by technology category. For example, data technology, server technology, network technology, and application technology.

This view displays all software models including those software models that are not associated with a business application.

You can select this view to dynamically load all technology categories. Expand a technology category to load all the software models associated to the category. Similarly, expand a software model to view its full versions, expand a version to view its associated business applications, and expand a business application to view its related application services, demands, and projects.

Note:

You can view projects only when you activate PPM Standard (com.snc.financial_planning_pmo) plugin.

With the By Product Classification view, you can perform the following search:

Use the **Enter Search Software Model** field to enter the name and search a software model from the list in the **Category** column.

By Software Model view - Legacy

The By Software Model view displays the **Software Models** > **Business Applications** > **Application Services**.

By this view you can view the list of all software models along with the full version. When you click to expand the software model, you can view all the business applications that run on that software model. On further expansion of the business application, you can view all the application services that the business applications support.

There is no direct cmdb CI relationship between a business application and a software model. Whereas a business application and an application service are related by cmdb relationship. For the application service, there are related software models that are stored and retrieved from the Application Service Software Models [sn_apm_tpm_service_software_model] table. Hence, the advantage of the By Software Model view is that you can directly view all the business applications that run on that software model and its full version.

By this view, you can only view the software models that have at least one or more business applications running on it.

You can also do the following:

- Search the software models.
- Set conditions to filter the software models.
- Display a selected number of software model records using the incremental pagination option.
- Add a demand or project to the software model. Point to the software model and click the icon that appears next to the software model name. The demand or the project form that

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opens has the names of the business applications that run on the selected software model, populated in the **Business Application** field.

Note: You can add a project to the software model only when you activate PPM Standard (com.snc.financial_planning_pmo) plugin.

Application Backlog view - Legacy

As an enterprise architect this view helps you to understand the epics, stories, and enhancements, which are the units of work in scrum, that impact your business application.

Note: Activate Agile Development 2.0 (com.snc.sdlc.agile.2.0) plugin to get the Application Backlog view in the TPM timeline.

Application Backlog view helps you to look into the centralized backlog of records that are of different task types such as epics, stories, and enhancements. This view facilitates prioritizing and sequencing of different task type records in one location, saving you from sorting and filtering them in many steps. In this view, you can:

- View all applications (first column) that are at a high risk by default, however you can filter based on the intensity of their risk in the second column.
- Filter the application records by any attribute in the business application table. Switch to either quarterly or monthly view of the timeline (third column).
- Create a project or demand to add to the application.
- Paginate the number of applications to be displayed in a single view.
- Expand the business application to view its unified backlog of epics, stories, enhancements, projects, and demands attached to the application. You can also see the total number of these entities within brackets.

You can view the following application backlog entities on the timeline in addition to the projects and demands attached to the application:

Epics

The high-level business goal of the application is broken down into one or more epics. Epics organize the work required to complete parts of the application goal in small pieces. Epics are further broken down to stories, which are fundamental units of work, that describe the business requirement briefly and can be completed within a sprint. The timeline for the epics is displayed based on the planned start date and planned end date of the epic. The status of epics must not be in **Complete** or **Canceled** state.

Stories

Stories usually are part of an epic. The stories contained in the epic attached to the business application that are not in **Complete** or **Canceled** state are displayed in the timeline. The timeline starts with the planned start date and ends with the planned end date of the sprint to which the story is tagged.

Others

There can be stories that are not attached to an epic but directly associated to the business application itself. Such stories are listed within the epics as **Others** and displayed in the timeline.

Enhancements

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Enhancements are special requests that come from users with non-scrum role. A scrum product owner reviews these requests and creates one or more user stories. Enhancements in **Closed Complete**, **On Hold**, and **Canceled** state are not displayed in the timeline. The enhancement timeline runs from the Planned start date to its end date when the sprint work is scheduled to begin and end.

Projects

If the PPM Standard (com.snc.financial_planning_pmo) plugin is activated, then you can add a project to the business application.

Demands

If the PPM Standard plugin is not activated, then by default, a demand is created.

Note: For the timeline to display the epics, stories, and enhancements, each of these records should reference the business application attached to it. See Associate epic to business application for more information.

Application column

All the epics, stories, enhancements, projects, and demands listed in the application column are clickable. Clicking each of them opens the record in a new tab that the clickable field points to.

Risk column

Shows the risks of the business applications only and not the risks of epics, stories, enhancements, projects, or demands.

Timeline column

The start and end dates of the units of work attached to the business application are plotted as a continuous line. However, if only one date is present, either the start or end date, then just that date is plotted as a filled circle.

Associate epic to business application for Application Backlog view - Legacy

An epic must reference the business application for it to be displayed in the Application Backlog view of the timeline.

Before you begin

Role required: admin, scrum_user, or scrum_admin

Procedure

1. Navigate to **All** > **Agile Development** > **Epics**.
2. Click update personalized list icon () in the Epics list view.
3. Move **Business Application** to the Selected list.
4. Click **OK**.
5. Double-click the Business Application column of the epic and add the business application.
6. Click the **Save** icon.

In a similar way, you can add a business application to Stories and Enhancements in their respective list view of the Agile Development application.

By SDLC Component view - Legacy

The By SDLC Component view displays the#**SDLC Components** > **Application Services** > **Hardware Models** and#**Software Models** structure in a succession. Also, the business

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applications are shown with the same indentation level of application services in the Business Application section.

With this view, you can view all the SDLC components along with the associated application services and business applications. You can also view the underlying software and hardware models that are associated to the application services. When you expand the software and hardware models, you can view their sources. The By SDLC Component view is available when ServiceNow® Common Service Data Model v4.0 is implemented.

The SDLC component is a configuration item that represents a unique code development effort. The purpose of the SDLC component is to represent the parts of a larger business application or digital product broken down into its individually developed components. An SDLC component is a software part or element of a larger whole for an application or technology.

There are two SDLC component types, Application and Infrastructure. Examples for type "Application" could be micro services and examples for type "Infrastructure" could be database configurations and security configurations. A deployed instance of an SDLC component of type "Application" would be an Application Service. A deployed instance of an SDLC component of type "Infrastructure" would be any infrastructure CI for which the SDLC component represents that snapshot of its configuration details.

A CMDB relationship between a business application, application service, and SDLC component can be created using the CI relationship [cmdb_rel_ci] table. To create a CMDB relationship with the compliance of CSDM v4.0, a relationship between an application service and an SDLC component and then between the SDLC component and the business application must be created.

The advantage of the By SDLC Component view is that you can directly view all the application services and business applications that are related to an SDLC component. For information on how to create a CMDB relationship, see Relate business application to application service using CI relationship editor - Legacy.

Note: With this view, you can only view the application services that have at least one SDLC component associated.

With the By SDLC Component view, you can perform the following search:

Use the **Enter Search SDLC Component** field to enter the name and search an SDLC component from the list in the SDLC Component column.

Use timeline to execute your application strategy - Legacy

Application column of the By Business Application view lists all the business applications that are used in your organization. If you toggle to the By Product Classification view, you can view all the technologies in the **Category** column. In the By Software Model view, you can view all the software models for each full version.

Before you begin

Role required: sn_apm.apm_user

About this task

By default, the TPM timeline view expands the first business application in the list to display its associated application services at the first level. It then displays the software and hardware models underlying the application service at the next level.

For the subsequent list of business applications, click to expand the arrow of the business application label to see the count and list of application services that are tied to the application. You can also view the underlying software and hardware models that are associated to the business application.

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Application Services, Software Models, and Hardware Models headers are in bold font to distinguish them from the application service, software, and hardware model labels that are in hypertext.

Procedure

1. To navigate to the Business Application form and view the record details and update, click the business application label.
2. To navigate to the Application Service form and update the record details, click the application service label.
3. To navigate to the Software Model form directly from the TPM timeline, click the software model label.
   You can modify the lifecycle details of the software product (product models of each full version) in the form.
4. To navigate to the Hardware form and to add or update the hardware lifecycle details in the Hardware Model Lifecycles related list, click the hardware label.
5. To add a demand or project to a particular business application (in the By Business Application view) or to a software model (in the By Software Model view), point to the application or the software model and click the add new project or demand icon () that appears next to the application or software model name.

   Note:

   You can create a project for a business application only when you activate PPM Standard (com.snc.financial_planning_pmo) plugin.

   In the New Demand form, you can see the business application name being auto-populated in the **Business Applications** field.

   You can add a demand to more than one business application. A demand (that may or may not be initially attached to a business application) can be attached to another business application as well.

   To add a demand to a business application, and view the demand in the timeline view of the TPM page:

   a. Navigate to **All** > *Enterprise Architecture* > **Application Portfolio Analysis** > **Demands**.
   b. Click open the demand.
   c. Select the business application in the **Business Applications** choice list of the Demand form to which you want the demand to be added.
   d. **Save** or **Update** the record.
   e. Navigate to **All** > *Enterprise Architecture* > **Technology Portfolio Management (TPM)** > **Technology Lifecycles** and refresh the timeline view of the TPM page.

      You can view the number of demands that are added to the business application. Click the arrow to expand and view the demand names.

      Note: The start and end date of the demand that is attached to a business application is plotted on the demand timeline. If only one date of the demand is present, either the start or end date, then that date is plotted as a point.

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Relate business application to application service using CI relationship editor - Legacy

Business applications can have multiple instances. Application instances are nothing but application services. Relate business applications to instances by relating business applications to application services. Business application and application service are two different configuration items which must be related through a CI relationship.

Before you begin

Role required: sn_apm.apm_user

Procedure

1. Navigate to **All** > *Enterprise Architecture* > **All Business Applications** > **Business Applications**.
2. To relate the business application with an application service, click open a business application.
3. Click the Add CI relationship () icon in the **Related Items** section of the business application form to launch the relationship editor and create the CI relationship.
4. Select one or more application services from the **Configuration Items** section.

   Integration with Service Mapping is through the CI relationship editor creating direct relationship between the configuration items.

5. Click the () icon in the **Relationships** section.
   By default **Consumes::Consumed by** relationship type is selected.

   You can relate two configuration items using the suggested relationship type of CMDB. It not only selects the relationship type automatically but also ensures consistency in the relationship. The suggested relationship is established between capability and application AND between application and service.

6. Click **Save and Exit**.

What to do next

You have created a relationship between a business application and an application service, you can now associate the application service to a software model.

Associate an application service to hardware model - Legacy

Track your equipment assets such as computers and servers using hardware models.

Before you begin

Important:

Starting with the Xanadu release, the legacy Technology Portfolio Management module is moved to the Enterprise Architecture Workspace. To learn more, see Manage the Technology Portfolio Management (TPM) in Enterprise Architecture Workspace.

Role required: sn_apm.apm_user

About this task

Hardware models are configuration items with specifications for a given device model. Specifications can be size, depth, image, model, and power of the device.

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Note: In Enterprise Architecture, only computers and servers are tracked as hardware or hardware models. Other types of hardware such as printers, network gear, peripherals, or UPS are not tracked for an application service.

Your business applications may run on multiple application services, which in turn can be installed on different types of hardware. Therefore associating application services with hardware models helps to know the risk on the Application Service due to underlying hardware.

When you run the Fetch Product Models job, the application service is automatically associated with a hardware model. The application service and the hardware product model are mapped and a record is created in the Application Service Hardware Models [sn_apm_tpm_app_service_hardware_model] table. However, you can also manually associate an application service to all hardware models, including the hardware.

After the Load TPM Risk Parameters and compute Application Service Risks scheduled job is executed, the technology risk data of the hardware model are generated and stored in Hardware Model Risks [sn_apm_tpm_hardware_model_risk] table.

Note: As an Enterprise Architecture user, your access to the hardware product model risk table is limited to read-only. However, if you are an Enterprise Architecture administrator you can create, modify, and delete the hardware model risks in the table. Access is also read-only to Hardware [cmdb_ci_hardware], Hardware Model [cmdb_hardware_product_model], and Hardware Model Lifecycle [cmdb_hardware_model_lifecycle] tables.

Procedure

1. Navigate to **All** > **Application Portfolio Management** > **Technology Portfolio Management (TPM)** > **Application Services**.
2. Click the service record, which is the application service, to which you want to associate a hardware model.
3. Click the **Application Service Hardware Models** related list.
4. Click **New**.

   The Application service hardware models database table stores the application service hardware model information. You can also navigate directly to the Application Service Hardware Models table from the application navigator.

5. On the form, fill in the fields.
   For field information, see Application Service Hardware Models form.
6. Click **Submit**.

Associate an application service to a software model - Legacy

Business applications have multiple instances such as development, QA, and production. Instances are nothing but application services. Application services must be associated with software models (to the respective full versions) to know the risk of the application service.

Before you begin

Important:

Starting with the Xanadu release, the legacy business applications module is moved to the Enterprise Architecture Workspace. To learn more, see Manage the Technology Portfolio Management (TPM) in Enterprise Architecture Workspace.

Role required: sn_apm.apm_user

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Procedure

1. Navigate to **All** > *Enterprise Architecture* > **Technology Portfolio Management (TPM)** > **Application Services**.
2. Select the service record, which is the application service, to which you want to associate the software models.
3. Select the **Application Service Software Models** related list.
4. Select **New**.

   The Application Service Software Models [sn_apm_tpm_service_software_model] database table stores the application service software model information. You can also navigate directly to the Application Service Software Models table from the application navigator. Data from this table is rendered as the software model timeline in the By Software Model view of the TPM screen.

5. On the form, fill in the fields.
   For field information, see Application Service Software Model form.
6. Select **Submit**.

What to do next

Create risk parameter scores to evaluate the risk of the software model. Based on the risk of the software model you can calculate the risk of the application service. Finally, based on the risk of the application service you can evaluate the risk of the business application.

Create a risk parameter - Legacy

The risk on a software model is calculated based on four preconfigured parameters such as external aging risk, internal aging risk, external stage risk, and internal stage risk.

Before you begin

Role required: sn_apm.apm_admin

About this task

In addition to the preconfigured parameters, you can also create risk parameters as per your business application requirements and the software models that it is based on. However, if you create a parameter, then you must also write a script with the logic to calculate that parameter risk.

Procedure

1. Navigate to **All** > *Enterprise Architecture* > **Administration** > **TPM Risk Parameters**.
2. Click **New** or open a record.
3. Fill in the form fields.
   For field information, see Risk Parameter form.
4. Click **Submit** or **Update**.

What to do next

After creating the risk parameters run the TPM risk engine to load the risk parameters and compute the application service risks.

Create or edit an architectural artifact - Legacy

Create or edit an architectural artifact to align it with your business requirements.

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Before you begin

Role required: sn_apm.apm_user

Procedure

1. Navigate to **All** > *Enterprise Architecture* > **#Architectural Artifacts** > **Artifacts**.
2. Create or edit an artifact.
   - To create an artifact, click **New**.
   - To edit an existing artifact, click the name of that artifact.
3. On the form, fill in the fields.
   For field information, see Create architectural artifact form.
4. Click **Submit** or **Update**.

Associate an artifact to a business entity - Legacy

Associate an architectural artifact to existing elements in the ServiceNow AI Platform, such as business capabilities or business applications. The association creates a relationship between the artifact and related entities.

Before you begin

Important:

Starting with the Xanadu release, the legacy architectural artifacts module is moved to the Enterprise Architecture Workspace. To learn more, see Add a related entity to an architectural artifact.

Role required: sn_apm.apm_user

Procedure

1. Navigate to **All** > *Enterprise Architecture* > **#Architectural Artifacts** > **Artifacts**.
2. Select the name of the artifact for which you want to add a related entity.
3. In the displayed details form, select the#**Related Entities** tab.
4. Select **New**.
5. On the form, fill in the fields.
   For field information, see Create related entities form.
6. Select **Submit**.

Manage the artifacts of a business capability - Legacy

View and manage the artifacts that are associated with a business capability.

Before you begin

Important:

Starting with the Xanadu release, the legacy Architectural Artifacts module is moved to the Enterprise Architecture Workspace. To learn more, see Manage architectural artifacts of a business capability in EA Workspace.

Role required: sn_apm.apm_analyst

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Procedure

1. Navigate to **All** > *Enterprise Architecture* > **Administration** > **Business Capabilities**.
2. Click the name of the business capability to view the associated artifacts.
3. In the Related Links section, select the **Architectural Artifacts** tab.
   A list of artifacts associated with the business capability is displayed.
4. Create or edit an existing artifact.
   - To create an artifact, click **New**.
   - To edit an existing artifact, click **Edit**.

   You can also download or remove the selected artifact as per your requirement.

Manage the artifacts of a business application - Legacy

View and manage the artifacts that are associated with a business application.

Before you begin

Important:

Starting with the Xanadu release, the legacy Architectural Artifacts module is moved to the Enterprise Architecture Workspace. To learn more, see Create an architectural artifact and associate it with a business application.

Role required: sn_apm.apm_analyst

Procedure

1. Navigate to **All** > *Enterprise Architecture* > **Application Portfolio** > **All Business Applications**.
2. Click the name of the business application to view the associated artifacts.
3. In the Related Links section, select the **Architectural Artifacts** tab.
   A list of artifacts associated with the business application is displayed.
4. Create or edit an artifact.
   - To create an artifact, click **New**.
   - To edit an existing artifact, click **Edit**.

   You can also download or remove the selected artifact as per your requirement.

Create or edit an artifact category - Legacy

Create#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

Important:

Starting with the Xanadu release, the legacy architectural artifact module is moved to the Enterprise Architecture Workspace. To learn more, see Add or edit an architectural artifact category.

Role required: sn_apm.apm_user

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Procedure

1. Navigate to **All** > *Enterprise Architecture* > **#Architectural Artifacts** > **Categories**.
2. Create or edit an architectural category.
   - To create a new architectural category, click#**New**.
   - To modify an existing category, click the name of the category.
3. On the form, fill in the fields.
   For field information, see Architectural category form.
4. Click **Submit** or **Update**.

Create an artifact version - Legacy

Create multiple versions of the architectural artifacts and send for approval. There can be only one approved version for each artifact.

Before you begin

Role required: sn_apm.apm_user

Procedure

1. Navigate to **All** > *Enterprise Architecture* > **#Architectural Artifacts** > **Artifacts**.
2. Select an architectural artifact for which you want to create an artifact version.
3. Select the **Architectural Artifacts Versions** tab.
4. Click **New**.
5. On the form, fill in the fields.
   For field information, see Architectural artifacts version form.
6. Click **Submit**.

Download an artifact version - Legacy

Download an approved artifact version to view the architectural diagram in it.

Before you begin

Role required: sn_apm.apm_user

Procedure

1. Navigate to **All** > **Architectural Artifacts** > **Versions**.
2. Select the architectural artifact version that you want to download.
3. Click **Download Artifact**.

> **Note:** You cannot download an unapproved artifact version or an artifact version that is a URL. If you try to download these, you get an error message.

Result

An approved version of the document is downloaded.

Request approval for an artifact version - Legacy

Send an architectural artifact version for approval to an Enterprise Architect user. The user reviews and approves the request.

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Before you begin
Role required: sn_apm.apm_user

Procedure
1. Navigate to **All** > **#Architectural Artifacts** > **Artifacts**.
2. Select the architectural artifact for which you want to send the artifact version for approval.
3. Select the **Architectural Artifacts Versions** tab.
4. Click the version number of the record to open it.
5. Select **Request Approval**.

Result
The record version is submitted for the approval to an Enterprise Architect. An email notification is sent to the approver.

Approve or reject an artifact version request - Legacy

As an Enterprise Architect, create, edit, and approve or reject architectural artifacts version requests that are submitted by other users.

Before you begin
Role required: sn_apm.apm_analyst

About this task
When a user requests an artifact, an email notification is received by the approver.

Procedure
1. Navigate to **All** > **Service Desk** > **My Approvals**.
2. Select the artifact request that you want approve or reject.
3. Select **Approve** or **Reject**.

Result
The requester receives an email notification for the approval or rejection.

Approve architecture review requests - Legacy

You can approve an architecture review request if you are part of the Enterprise Architect Group.

Before you begin

Important:

Starting with the Xanadu release, the legacy business applications module is moved to the Enterprise Architecture Workspace. To learn more, see Managing requests, certifications, and assessments.

Role required: sn_apm.apm_analyst

About this task
An approver in the group need not necessarily be an Enterprise Architecture user nor have an Enterprise Architecture role. However, the approver must be a user listed in the user table [sys_user]. Any approver from the Enterprise Architect Group can approve the architecture review request.

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To add or modify the members in the group, navigate to **All** > *Enterprise Architecture* > **Administration** > **Services Approval Group**.

Procedure

1. Navigate to **All** > *Enterprise Architecture* > **Business Application Lifecycle Management** > **Service Requests**.
2. Click the task number.
3. Scroll down to the Approvers related list and click the state of the approval.
4. Select **Approved** or **Rejected** in the **State** field.
5. Click **Update**.

   The requester receives an email notification once you approve or reject an ARB request. An automated flow designer process is also created. You can navigate to **All** > *Enterprise Architecture* > **Administration** > **Services Flow Designer** to see the flow.

Create a diagram for a business application - Legacy

Create a diagram in for your business application hierarchy and associate it with an architectural artifact. Use the ServiceNow Enterprise Modeling and Visualization or Lucidchart to create a diagram for your business hierarchy.

Before you begin

Important:

Starting with the Xanadu release, the legacy create diagram feature is moved to the Enterprise Architecture Workspace. To learn more, see Create a Lucidchart diagram for a business application in the EA Workspace.

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
- Lucidchart Integration

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

Procedure

1. Navigate to the Business Application diagrams.
   - Navigate to **All** > *Enterprise Architecture* > **#Architectural Artifacts** > **#Diagrams**.
   - Navigate to **All** > *Enterprise Architecture* > **Application Portfolio** > **All Business Applications** and select a Business Application.

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2. Click **Create Diagram**.
3. On the form, fill in the fields.
   For field information, see Create diagram form for 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.

4. Click **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.

Create a Lucid diagram for a business capability - Legacy

Create a diagram in Lucidchart for your business capability maps and associate it with an architectural artifact.

Before you begin

Important:

Starting with the Xanadu release, the Create Diagram feature is moved to the Enterprise Architecture Workspace. To learn more, see Create a Lucidchart diagram for a business capability in the Enterprise Architecture Workspace.

Install the following store apps:

- Lucidchart Diagramming Spoke
- Lucidchart Integration

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 the Business Capabilities diagrams in one of the following ways:
   - Navigate to **All** > **Enterprise Architecture** > > **#Architectural Artifacts** > **#Diagrams**.
   - Navigate to **All** > **Organization** > **Business Capabilities** and select a Business Capability.
2. Click **Create Diagram**.
3. On the 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.

   For field information, see Create diagram for a business capability.
4. Click **Create Diagram**.

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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.

Use Business Application Lifecycle Management to request or retire an application - Legacy

If you are an Enterprise Architecture user, you should use the Business Application Lifecycle Management services to request or register a new business application for your business. You can request a business application like you place an order for any other service catalog item.

Before you begin
Role required: sn_apm.apm_user

About this task
The base system also offers **Register a Business Application** as a service to all ServiceNow AI Platform customers. The Enterprise Architecture Core plugin (com.snc.apm_core) provides this service and the plugin is available on new and restarted instances. Customers who do not have the Enterprise Architecture application can avail this service to request a new business application. However, activating the Enterprise Architecture plugin (com.snc.apm) enhances this service to predict and set application category using the machine-learning solution.

For more information on the plugin, see Activate Application Portfolio Management. See Predictive Intelligence for Application Portfolio Management to know more about machine-learning solution for business applications.

Procedure
1. Navigate to **All** > *Enterprise Architecture* > **Business Application Lifecycle Management** > **Business Application Catalog**.

   Business Application Lifecycle Management Services opens in a service catalog page.

2. Click the **Register a Business Application** card or click **View Details** in the Register a Business Application card to register a new business application.
3. Enter the details in the Register a Business Application form.

   Name of the business application is mandatory. Mandatory fields have a red asterisk (*) beside them.

4. Click **Submit**.

   The system validates your request to check if a business application with the same name exists. If yes, then an error message is displayed. If no, then a flow is triggered and a request to register a business application is created.

   The approval request is sent to the Business Application Registration Approval Group. After a member of the group approves your request, the business application gets created as a record in the business application table. You will receive an email notification for the same.

5. To retire a business application that you no longer require, click the **Retire a Business Application** card or click **View Details** in the Retire a Business Application card.

   a. Select the name of the application from the list of values in the Retire a Business Application form.
   Conditions to retire a business application:

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- Only if you are an IT owner of the application, business owner, or a user who supports the application, you can request to retire an application.
- You require sn_apm.apm_user or sn_apm.apm_analyst role to retire a business application.
- As an Enterprise Architecture user, you cannot delete a business application record or mark the application as **Inactive**. However, you can raise a new request to decommission an application.
- The business application that you choose to retire must not be in **Retired** status nor the application record **False** (inactive) in the **Active** field.

b. Click **Submit**.

Manage Business Application Lifecycle Management service requests - Legacy

You can approve requests raised by an Enterprise Architecture user either for a new business application or retire an application that the user no longer requires.

Before you begin

Role required: sn_apm.apm_analyst

The approver (apm_analyst) must also be a part of the Enterprise Architect Group. To add or modify the members in the group, navigate to **All** > *Enterprise Architecture* > **Administration** > **Services Approval Group**.

Procedure

1. Navigate to **All** > *Enterprise Architecture* > **Business Application Lifecycle Management** > **Service Requests**.

   All requests related to the Business Application Lifecycle Management services are stored as tasks in the Business Application Requests table [business_app_request].

   Note the tasks that are in your queue for your approval.

2. Select the task number.
3. Scroll down to the Approvers related items.
4. Select the state of the approval task.
5. Select the appropriate state from the list in the **State** field.
6. Enter a comment if required.
7. Select **Update**.

   Once you approve or reject a request, a corresponding flow is triggered. Select the **Show flow engine context** related link to view the flow engine context of the request. You can also navigate to **All** > **Enterprise Architecture** > **Administration** > **Services Flow Designer** to see the flow in the flow designer.

   If you approve a Register a Business Application request

   - The approved business application is created as a record with an identification number in the business applications table [cmdb_ci_business_app]. The status of the application is in the **Implementing** state.
   - An email is sent to the requester notifying the approval of the business application.

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If you approve a Retire a Business Application request

- Based on the value selected in the system property, *sn_apm.retireBusinessApplicationTaskType*, a project, or demand is created. If the value is set as project, then a project template defined in the system property, *sn_apm.retireBusinessAppProjectTemplate*, is applied.

  Note: If the value is set to project in the system property *sn_apm.retireBusinessApplicationTaskType*, you require Strategic Portfolio Management (SPM) subscription to approve requests to retire business applications and create a project.

  The base system of Enterprise Architecture offers a project template called **Retire Business Application** with eight different pre-defined project template tasks for proper decommissioning of the application.

  After the project is created and a project manager is assigned to the project, the project manager can review, edit, or add tasks as required. For more information on project templates, see Project templates. To understand the project tasks, see Project tasks.

- If the value in the *sn_apm.retireBusinessApplocationTaskType* system property is set as demand, then a demand is created.

  Unlike a project, Enterprise Architecture doesn't generate a demand from a template with pre-configured demand tasks. Instead the demand is created with certain values auto-populated in mandatory fields.

  To view the demand that is created to retire an application, navigate to **All** > **Enterprise Architecture** > **Application Portfolio Analysis** > **Demands**.

  For field information, see Demand form to retire an application.

- If you approve a request for which a project or demand is already in place, then another project or demand will not be created for the request.
- If the request to retire an application is rejected, then an email notification is sent to the requester. However, the status of the business application isn't updated irrespective of it being approved or rejected.
- You can delete a business application record or mark an application as **Inactive** as an Enterprise Architecture admin or analyst.

Use Business Application Lifecycle Management to request an architecture review - Legacy

You can request a review of your new architecture design proposal on the technology of a business application by presenting it to the architecture review board.

Before you begin

Role required: sn_apm.apm_user

About this task

As an application owner you can propose a modification to the underlying technology of a business application, modification to network design, or propose a new service, solution, or hardware standard.

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Your design proposal is reviewed by a team of enterprise architects forming an Architecture Review Board with goals to:

- Align development with IT strategies.
- Improve the product quality through the design review process.
- Provide guidance on recommended practices for specific design questions.
- Act as a referral team for security, performance, UI design to review upcoming features that may be impacted.

Architecture review requests are routed through the Business Application Lifecycle Management workflow to the configured Architecture Review Board (ARB). To process requests, your organization must define an ARB approval group and associate it with the architecture review workflow. If requests do not progress after submission, verify that the ARB group and approval configuration are set up by an Enterprise Architecture administrator.

Procedure

1. Navigate to **All** > *Enterprise Architecture* > **Business Application Lifecycle Management** > **Business Application Catalog**.
2. Click the **Request Architecture Review** link or **View Details** in the Request Architecture Review card to request an architecture review.
3. On the form, fill in the fields.

   Name of the business application is mandatory. Mandatory fields have a red asterisk (*) beside them.

   Note:

   You must be the business owner, IT Application owner, or one who supports the application to request an architecture review.

   For field information, see Request Architecture Review form.
4. Click **Submit**.

   On submission, an approval request is sent to the members of the Enterprise Architect Group. An email notification is sent to you as soon as your request is approved by the review board. You shall be notified even if your request is rejected.

Create or edit an indicator to assess an application - Legacy

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

Before you begin

Important:

Starting with the Xanadu release, the application indicators module is moved to the Enterprise Architecture Workspace. To learn more, see Manage indicators.

Role required: sn_apm.apm_admin

About this task

Each indicator periodically captures related application data which 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

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ones to calculate the application score, then you can create an indicator based on your business requirements.

Procedure

1. Navigate to **All** > *Enterprise Architecture* > **Administration** > **Application Indicators**.
2. Click **New** or click an existing application indicator to edit.
3. On the form, fill in the fields.
   For field information, see Indicator form.
4. Click **Submit**.
5. To regenerate the indicator score of an application, click open an indicator.
   a. Click the **Regenerate indicator score** option in the context menu.

      The action deletes the existing scores and generates new scores instead of just updating the existing scores for that indicator. This indicator may be attached to one or more scoring profiles, and therefore recalculates the scores of all business applications that are associated to this scoring profile.

   b. Select the Fiscal Period in the Regenerate application indicator scores dialog box.

   c. Click **OK**.

   d. Click **Update**.
6. To create a dependent indicator, click open the indicator.
   If you had selected Indicators in the **Data source** field, then when you open that indicator record, the Indicator Dependencies related list is displayed.

   Note: An indicator which has its data source as indicator cannot be added as a dependent child indicator.

   a. Click **New** in the Indicator Dependencies related list.
      The parent indicator auto-populates in the Parent Indicator field.

   b. Select a dependent indicator in the **Child Indicator** field.

   c. Click **Submit**.
7. To assess the business application, click **Generate Assessments**.

What to do next

Use the preconfigured indicators to assess the applications based on cost, quality, and risk.

Generate survey assessments and view the results within Enterprise Architecture - Legacy

Within Enterprise Architecture you can assign an assessment questionnaire to a user who uses a business application and get the feedback about the application.

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Before you begin

Important:

Starting with the Xanadu release, the application indicators module is moved to the Enterprise Architecture Workspace. To learn more, see Regenerate capability indicator scores on-demand in Enterprise Architecture Workspace and Regenerate application indicator scores on-demand in Enterprise Architecture Workspace.

To know more about indicators, see Manage indicators.

Role required: sn_apm.apm_admin

About this task

Enterprise Architecture integrates with Assessments and Surveys to evaluate business applications and business capabilities based on assessment metric types. Application indicators that are sourced from assessments can only be assessed using the assessment metric.

An **assessment metric** is a trait or value that is used to evaluate a business application. Related metrics are grouped under an **assessment metric category**, which can be used to evaluate business applications for that category only. Whereas a **metric type** can comprise many metric categories that define a set of criteria an organization uses to evaluate its business applications.

For example, an organization may employ assessment metric types such as customer satisfaction, business value, technical risk, and functional fit to evaluate its business applications. Further, the organization can assess a group of business applications based on one assessment metric category, such as CSAT category for customer satisfaction. Within this CSAT category, you can define an actual assessment metric such as a question in an assessment questionnaire, *How likely is it that you would recommend this application to others?*

Your business application is the assessable record and it's linked to a metric type. Use the custom UI to set conditions based on the columns of the business application table that meet your criteria and filter the applications. Select either a user group or selective users as target assessors and send out the questionnaires for them to take the survey. View the assessments and their status in the **Assessment Instances**, and the results in the **Metric Category Results** tabs of the **Indicator** related lists.

Procedure

1. Navigate to **All** > *Enterprise Architecture* > **Administration** > **Application Indicators**.
2. Select open an indicator whose data source is assessments.
3. Select the **Generate Assessments** button.
4. To filter the business applications that should be assessed, set your conditions in the **Field**, **Operator**, and **Value** fields of the condition builder in the Generate Assessment UI that opens up.

   Your filter criteria are applied on all records in the business application [cmdb_ci_business_app] table and you can filter applications by any column of the table.
5. To add a dependent condition, select **AND** or **OR** next to the condition.
6. To add a top-level condition or multiple filter criteria, select the **New Criteria** button.
7. To clear existing filter conditions and set a new condition, select the **Clear All** button.
8. Select users in the **Select Target Assessors** region to send the assessment questions.

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You can either select a user group or move individual application users to the Assessors list.

9. Select **Send Assessments**.
10. Select **OK** to confirm in the Send Assessment dialog box.

    The user can view and take the assigned assessments by navigating to **Self-Service** > **My Assessments & Surveys**.

    For more information, see Take a survey.

    After the user submits the assessments, the **State** of the assessment instance in the **Assessments Instances** tab changes to **Complete**.

11. Select the **Assessments Instances** tab to view the instances of assessments that have been created, the total number of assessments that have been sent out to users who fit in the filter criteria, and the status of the assessment instances.

    Each occurrence of a questionnaire assigned to one user is an assessments instance.

    Note:

    The indicator score and the corresponding application score are calculated only when all the users in the assessment group have completed the assessment.

12. Select the **Metric Category Results** tab to view the weight, rating, and normalized value of each business application that was assessed by the user or the user group.
    For more information, see View an assessment category result to know how the assessment results are calculated.

Create an application score profile and attach profile indicators - Legacy

You can create an application score profile and update the default application profile with new profile indicators per your requirements. After you create a score profile, you have to associate it with indicators.

Before you begin

Important:

Starting with the Xanadu release, the legacy scoring profiles module is moved to the Enterprise Architecture Workspace. To learn more, see Manage scoring profiles.

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 **All** > *Enterprise Architecture* > **Administration** > **Scoring Profiles**.
2. Click **New**.
3. On the form, fill in the fields.
   For field information, see Scoring Profile form.
4. Right-click the form header and click **Save**.

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After creating a score profile, you must associate a profile indicator to the score profile.

5. In the Profile Indicators related list, add indicators.

   a. Click **New**.

   b. On the form, fill in the fields.

Profile Indicator form

Field	Description
Profile	Name of the application profile.
Indicator	Name of the application indicator.
Evaluate within Application Scoring Profile	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.
Domain	The domain to which this indicator belongs.
Used in CI score calculation	Option for using the application indicator in calculating the application score.
Weightage	Numeral for the indicator. Weightage provided in the application score profile for an indicator contributes to the total score of the application.

   An indicator that is added to the profile can be a parent indicator with dependent child indicators. When such a parent indicator is added to a scoring profile, then all its dependent child indicators are also added with weightage 0, if they are not already present in the scoring profile.

   For more information on how to create a dependent indicator, see Create or edit an indicator to assess an application.

   c. Click **Submit**.

What to do next

Regenerate scores: Click the **Regenerate scores** button to regenerate the scores of all the indicators attached to the scoring profile. This action deletes the existing scores and generates new scores instead of just updating the existing scores. Therefore, the scores of all the business applications that are associated to this scoring profile are also recalculated.

You can schedule a job to calculate application scores periodically.

View application indicator scores - Legacy

View the application indicator scores that are sourced and computed based on the sourcing setup defined for the application indicators. The assessment framework calculates the score

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only for those indicators which are attached to at least one scoring profile. The indicator scores help you to evaluate the applications and make strategic decisions on them.

Before you begin

Important:

Starting with the Xanadu release, the legacy application ratings module is moved to the Enterprise Architecture Workspace. To learn more, see List view of application rationalization.

Role required: sn_apm.apm_analyst

About this task

You can view the application indicator score details of the business applications for a fiscal period.

Procedure

1. Navigate to **All** > *Enterprise Architecture* > **Application Ratings** > **Indicator Scores**.
   The applications are listed showing the indicators, indicator scores, normalized value, application weight, and total weight for each fiscal period. The normalized value, indicator score, application weight, target maximum, target minimum, and total weight are all rounded to two decimal places.
2. Click a business application in the list to view the details of the application.

Related topics

Create or edit an indicator to assess an application - Legacy

View all application scores - Legacy

View the application scores that are computed as a weighted sum of the application indicators on the application scoring profile. The application scores help to evaluate the applications and make strategic decisions on them.

Before you begin

Important:

Starting with the Xanadu release, the legacy application ratings module is moved to the Enterprise Architecture Workspace. To learn more, see List view of application rationalization.

You can create the scores manually, but it's recommended that the assessment framework computes the scores.

Role required: sn_apm.apm_analyst

About this task

You can view the application score for a particular business application in a fiscal period.

Procedure

1. Navigate to **All** > *Enterprise Architecture* > **Application Ratings** > **All Application Scores**.
   The applications are listed with their respective scores for each fiscal period. The scores are rounded to two decimal places.
2. Select a business application in the list to have a detailed view of the application.

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Related topics

Normalization of application scores - Legacy

Analyze application scores in a bubble chart - Legacy

Bubble charts are interactive graphs that help you identify strategies by plotting application indicator scores. You can evaluate applications for a category and decide whether to invest, sustain, or to replace an application by configuring multiple combinations of indicators in the bubble chart.

Before you begin

Important:

Starting with the Xanadu release, the bubble chart feature is moved to the Enterprise Architecture Workspace. To learn more, see Bubble chart view of application rationalization.

Role required: sn_apm.apm_analyst

About this task

Use the bubble chart to plot the indicator scores of the applications in X and Y axes. You can then use these scores to strategize goals and create a demand to invest in, replace, or sustain the application.

Procedure

1. Navigate to **All** > *Enterprise Architecture* > **Application Portfolio Analysis** > **Analyze**.

   The Group Analysis page is displayed.

   The Group Analysis page has the following sections:

   Assessment Period

   The fiscal period for which the analysis of applications is done.

   Filter Apps

   Helps filter the application categories based on the criteria set on the application indicator scores.

   Categories drop-down

   Helps to filter application by groups such as Application Family, Application Category, and Capability.

2. Select **Application Category** from the Category drop-down list.

   List of capabilities is displayed.

3. Click an application category to open it.

   A bubble chart is opened for the application category. The bubble chart helps you to view the metrics of the application indicator scores that fall within the filtered values.

   Use the **Application Analysis** section to compare applications with the selected indicators. It shows the total score of the application rounded to two decimals, along with contract renewal details, its life-time details, and the different costs associated with the application. You can analyze to know which applications to invest further and that which are not really useful. To view the business application record details in the Business Application form, click the name

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of an application in the list. To view the application details in a dashboard view, click the Application 360 tab in the Business Application form.

4. To change the configurations of the bubble chart, click the configuration icon () icon and then fill in the fields on the Select Chart Dimensions form.
   For field information, see Select Chart Dimensions form.

What to do next

Point to the bubble in the chart and click the application or right-click the bubble and select **Create Demand** to create a demand for the application.

Create or edit a bubble chart for application strategies - Legacy

Set up a bubble chart to compare and evaluate the relative standing of applications in selected categories. The chart helps you determine which applications to invest more in, keep, replace, or eliminate.

Before you begin

Important:

Starting with the Xanadu release, the legacy bubble chart feature is moved to the Enterprise Architecture Workspace. To learn more, see Bubble chart view of application rationalization.

Role required: sn_apm.apm_admin

If you require new indicators, create the application indicators before you create the application bubble chart for which the application framework calculates the scores.

About this task

You can configure existing application bubble charts or create them to align with your business needs.

Procedure

1. Navigate to **All** > *Enterprise Architecture* > **Administration** > **Bubble chart**.
2. Click **New** to create a new chart or click the name of an existing chart that you want to edit.
3. On the form, fill in the fields.
   For field information, see Application bubble chart form.
4. Click **Submit**.

What to do next

To view the bubble chart, go to the Group Analysis page.

Monitor performance, costs, and workloads in Application 360 - Legacy

Application 360 dashboard performs as a reporting tool and uses Performance Analytics to provide a decision-making approach to Enterprise Architecture by identifying which business application requires focus and attention. The dashboard helps you to analyze the indicator scores and execute effective decisions.

Before you begin

Important:

Starting with the Xanadu release, the legacy Application 360 dashboard is moved to the Enterprise Architecture Workspace. To learn more, see Explore the Application 360 dashboard in Enterprise Architecture Workspace.

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In the Business Application choice list, select an application to monitor its performance, costs, and workload in the following tabs and sections within the application 360 dashboard:

- **Overview**: Review the overall application score for the fiscal period.
  - **Application Indicator Scores**: View the trend and distribution for the different indicators of the selected fiscal period.
- **Costs**:
  - **Total Costs Fiscal Quarterly**: View the details of the total cost incurred in the quarterly fiscal period.
  - **Scorecard**: Ascertain the cost details and ratings over time, comparing them over different quarters.
- **Workload**: View the graphical illustration of the number of new incidents, problems, and changes over the selected fiscal period and the workload trend.

Role required: sn_apm.apm_analyst

Procedure

Navigate to **All** > *Enterprise Architecture* > **Application Portfolio Analysis** > **Application 360**.

Related topics

Getting started with reports

Create and use dashboards

Assess the performance of applications in the dashboard - Legacy

Use the Application Assessments dashboard for an overview of reports on the performance of the business applications. The spline chart gives you a trend of the application indicators against the normalized value over different quarters in a fiscal period.

Before you begin

You must have the Performance Analytics – Content Pack – Enterprise Architecture (com.snc.pa.apm) plugin activated before you can use the Application assessments dashboard. The plugin gives you access to the Enterprise Architecture application indicator scores used in Performance Analytics (PA) reports and dashboards.

Role required: sn_apm.apm_user

About this task

Enterprise Architecture provides preconfigured reports in the Application Assessments dashboard. You can configure these reports using dashboards. You can also filter data on the dashboard.

The Application Assessments dashboard is a responsive dashboard that provides a complete view of applications. You can share widgets with different indicators and indicator scores. The PA widgets on the dashboard visualize data over time, helping you analyze business processes and identify areas for improvement.

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

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- **Customer satisfaction trend**: Level of customer satisfaction over time with the various applications that belong to the 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.
- **Cost of support trend**: cost of the applications over time.
- **Total changes trend**: total changes over time.
- **Technical Risk Trend**: Technical risk the applications may have over time.

Procedure

1. Navigate to **All** > *Enterprise Architecture* > **Application Portfolio Analysis** > **Dashboard**.
2. To save a chart as a JPG or PNG file, point to the chart and click the menu icon that appears.
3. To filter the data in the spline charts, select options from the **Application Category**, **Portfolio**, **Business Process**, and **Business Unit** lists.

   Note: Activate PPM Standard (com.snc.financial_planning_pmo) plugin to apply the portfolio filter.

Related topics

Getting started with reports

Create and use dashboards

Create a goal for an application strategy - Legacy

After assessing the applications and deciding on strategies, set concrete goals to maximize or minimize depending on the indicators for the selected fiscal period.

Before you begin

Important:

Starting with the Xanadu release, the legacy goals module is moved to the Enterprise Architecture Workspace. To learn more, see Exploring goals.

Role required: user_admin, pps_admin

About this task

To understand how your organizational strategies are performing, see the Strategic Spend Tracking for PPM dashboard topic. It provides comprehensive visualization to help you understand how the planned costs, actual costs, and benefits for projects aligned to your organization's strategies trend over time.

Procedure

1. Navigate to **All** > *Enterprise Architecture* > **Home** and click **Create** in the **Opportunities & Solutions**, Goals section.

   You can also navigate by any of the following steps:

   - *Enterprise Architecture* > **Application Portfolio Analysis** > **Goals** and click **New**.
   - **Organization** > **Goals** and click **New**.

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2. Fill in the form fields.
   For field information, see Goal form.
3. Click **Save**.
4. In the Recent Goals section, click the goal that you created and update the following fields:
   For field information, see Update Goal form.
5. Click **Save**.
   You can view all the goals from the list in the Recent Goals section of the portal by clicking **View all**.

What to do next
You can create a program to execute the goal.

Related topics
Allocate or modify the strategy and goal percentage for a project

Create a demand towards achievement of goal - Legacy

Use a demand as a step to identify cost saving opportunities on the applications and to meet the target. The strategy that you associate with the demand action decides the strategy for the application.

Before you begin

Important:

Starting with the Xanadu release, the legacy demand module is moved to the Enterprise Architecture Workspace. To learn more, see Exploring demands.

Role required: sn_apm.apm_analyst

About this task
Create a demand to capture details like action, start and target fiscal period, application, program, and so on.

Procedure
1. Navigate to **All** > *Enterprise Architecture* > **Application Portfolio Analysis** > **Demands** and click **New**.

   You can also navigate to the Demand form from any of the following portals:

   - Application Portfolio Management Home page
   - Capability Based Planning map
   - Bubble chart
   - Technology Portfolio Management timeline
2. On the form, fill in the fields.
   For field information, see Demand form.
3. To submit the record and go back to the list view, click **Submit**.
4. Click **Save** to save the record and remain on the same form to add more details to the demand.

Create a program for an application goal - Legacy

Create a program, link it to the goal that you created, and associate a program manager to the program. After you create a goal, you should have a program to achieve the goal that you created.

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Before you begin

Note:

You can create a program only when you activate PPM Standard (com.snc.financial_planning_pmo) plugin.

Role required: sn_apm.apm_analyst

Procedure

1. Navigate to **All** > *Enterprise Architecture* > **Home**.

   You can also navigate to *Enterprise Architecture* > **Application Portfolio Analysis** > **Programs** and click **New**.

2. Click **Create**.
3. On the form, fill in the fields.
   For field information, see Program form.
4. Click **Save**.
   You can view all the programs in the Programs list section of the portal.

What to do next

Learn about and create a guided plan to execute the program that you have created or any other program in the list.

Create a guided plan to execute a program - Legacy

Create a guided plan by setting goals, identifying opportunities, creating demands, and tracking the projects. The guided plan helps you to implement the program that you created.

Before you begin

You can create a guided plan to execute a program only when you activate PPM Standard (com.snc.financial_planning_pmo) plugin.

You should have created a program before you create a guided plan for the program.

Role required: sn_apm.apm_analyst

About this task

The Program Navigation page guides you in setting a goal target for the fiscal years to achieve the goal. You can also view the application rationalization roadmap at any stage of creating the program.

1. Navigate to *Enterprise Architecture* > **Home**.
2. Click **View** in the **No. of Programs** pane of the **Opportunities & Solutions** section.
3. Click a program in the Programs list.
4. Click the **Select Fiscal Period to start planning** choice list in the **Fiscal Period** section and select the financial year to start with the program steps.

Procedure

- **Step 1: Set Goal Contribution Target**

  1. Click **Set target**.

  2. On the form, fill in the fields.

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For field information, see Goal Contribution Target form.

3. Click **Save**.
   The **Step 1: Set Goal Contribution Target** shows the percentage of the goal that you want to achieve in the selected fiscal period. For example, if your goal is to maximize cloud applications by 40% in FY18 and you set the **Target Goal Contribution %** as 50%, then the **Set Goal Contribution Target** displays 20%.

- **Step 2: Identify Opportunities**

1. Click **Identify Opportunity** in the Program Navigation page.

   On the **Group Analysis** page, review the assessment period, analyze the application categories, and assess the number of applications against each category.

2. Click the **Select Fiscal Period to start Analysis** choice list in the **Assessment Period** section and select a fiscal period for which you would like to analyze the applications.

3. Use the **Filter Apps** pane to set your filter conditions based on the application indicators and scores.

4. Compare and analyze the applications by category name in the **Application Categories** section.

5. Click an item in the **Category Name** column.

6. Right-click a bubble in the bubble chart and click the **Create Demand** prompt to create a demand.
   For example, if your goal is to invest more on a category, then click the invest bubble to achieve that goal.
   After you save the demand, the bulb icon on the top-right corner of the page displays the number of demands that are created.

- **Step 3: Track Project**

1. Click the projects link to track the status of the project anytime.
   The Program Workbench opens up, which is a central location for creating and managing projects. As the demand manager approves the demands and the projects are executed, you can navigate to the program workbench to track the status of the projects.

Add a TRM product - Legacy

As an Enterprise Architect, you can add a new TRM product to the TRM library.

Before you begin

Important:

Starting with the Xanadu release, the legacy Technology Reference Model module is moved to the Enterprise Architecture Workspace. To learn more, see Add a TRM product in Enterprise Architecture Workspace.

Role required: sn_apm_analyst

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Procedure

1. Navigate to **All** > *Enterprise Architecture* > *Technology Reference Model* > **Products**.
2. Click **New**.
3. On the form, fill in the fields.
   For field information, see TRM product form.
4. Click **Submit** or **Update**.

Add or edit a TRM product request - Legacy

Add a new request or edit an existing request to include a new software or hardware product to the TRM library.

Before you begin

Important:

Starting with the Xanadu release, the legacy Technology Reference Model module is moved to the Enterprise Architecture Workspace. To learn more, see Request a TRM product.

Role required: sn_apm.apm_user

Procedure

1. Navigate to **All** > *Enterprise Architecture* > *Technology Reference Model* > **Product Requests**.
2. Create or edit a request.
   - To create a TRM product request, select **New**.
   - To edit an existing TRM product request, select the name of the product request.
3. On the form, fill in the fields.
   For field information, see Request TRM product form.
4. Select **Submit** or **Update**.

Add or edit a TRM product lifecycle request - Legacy

Add a new request or edit an existing request to create a lifecycle for a TRM product.

Before you begin

Important:

Starting with the Xanadu release, the legacy Technology Reference Model module is moved to the Enterprise Architecture Workspace. To learn more, see Add a TRM product lifecycle.

Role required: sn_apm.apm_user

About this task

In the TRM library, each product is associated with a set of phases such as Approved, Approved with Constraints, Divest, Evaluation, and Unapproved.

Procedure

1. Navigate to **All** > *Enterprise Architecture* > **Technology Reference Model** > **Product Lifecycle Requests**.
2. Create or edit TRM product lifecycle.

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- To create a new TRM product lifecycle, click **New**.
- To edit an existing TRM product lifecycle, click the name of the life cycle.

3. On the form, fill in the fields.
   For field information, see TRM Product Lifecycle Request form.
4. Click **Submit** or **Update**.

Request a TRM product using the TRM Catalog - Legacy

Request a TRM product using the TRM catalog to add a new software to the TRM library.

Before you begin

Important:

Starting with the Xanadu release, the legacy Technology Reference Model module is moved to the Enterprise Architecture Workspace. To learn more, see Manage the Technology Reference Model in Enterprise Architecture Workspace.

Role required: sn_apm.apm_user

Procedure

1. Navigate to **All** > *Enterprise Architecture* > **Technology Reference Model** > **TRM Catalog**.
   The Technology Reference Model Management page opens in the Service Catalog page.
2. Click the **Request TRM Product** card.
3. On the Request TRM Product form, fill in the fields.
   For field information, see TRM Product Request using catalog form.
4. Click **Submit**.

Request a TRM product lifecycle using the TRM Catalog - Legacy

Request a TRM product lifecycle using the TRM catalog to add the lifecycle for a TRM product.

Before you begin

Role required: sn_apm.apm_user

Procedure

1. Navigate to **All** > *Enterprise Architecture* > **Technology Reference Model** > **TRM Catalog**.
   The Technology Reference Model Management page opens in the Service Catalog page.
2. Click the **Request TRM Product Lifecycle** card.
3. On the Request TRM Product Lifecycle form, fill in the fields.
   For field information, see TRM Product Lifecycle Request form
4. Click **Submit**.

Approve or reject a TRM product or product lifecycle request - Legacy

As an Enterprise Architect, approve or reject a TRM product version request submitted by other users.

Before you begin

The user must be part of the Enterprise Architect Group.

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Role required: sn_apm.apm_analyst

About this task
When an Enterprise Architecture user requests for TRM product or TRM product lifecycle approval, an email notification is received by the approver. The approver belongs to the Enterprise Architect group.

Procedure
1. Navigate to **All** > **Service Desk** > **My Approvals**.
2. Select the TRM product or product lifecycle request for which you want to provide approval.
3. Select **Approve** or **Reject**.

Result
The requester receives an email notification for the approval or rejection.

Add or edit a TRM category - Legacy

Add a new request or edit an existing request to create a TRM category.

Before you begin
Important:

Starting with the Xanadu release, the legacy Technology Reference Model module is moved to the Enterprise Architecture Workspace. To learn more, see Manage TRM categories.

The user must be part of the Enterprise Architect Group.

Role required: sn_apm.apm_analyst

Note: The user (sn_apm.apm_analyst) must be part of the Enterprise Architecture Group.

About this task
A TRM category is a grouping of TRM software products by their purpose and function. The categorization helps you to consolidate TRM products and rationalize decisions. You can create a TRM category or edit an existing one to align it with your business requirements. You can define categories or rely on the Software Asset Management product classification.

Procedure
1. Navigate to **All** > *Enterprise Architecture* > **Technology Reference Model** > **Categories**.
2. Create or edit a category.
   - To create a category, select **New**.
   - To edit an existing category, select the name of the category.
3. On the form, fill in the fields.
   For field information, see TRM Category form.
4. Select **Submit** or **Update**.

View and edit your product requests - Legacy

View all your product requests, track their statuses, and edit your existing requests. You can also manage the approvers for your request.

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Before you begin

Important:

Starting with the Xanadu release, the legacy Technology Reference Model module is moved to the Enterprise Architecture Workspace. To learn more, see View or update your TRM requests.

Role required: sn_apm.apm_user

Procedure

1. Navigate to **All** > *Enterprise Architecture* > **Technology Reference Model** > **My Product Requests**.
   You can see all your product requests and their approval status.
2. Click the name of an existing product request that you want to edit.
3. On the Request TRM Product form, fill in the details.
   For field information, see Request TRM product form.
4. In the Approvers section, add or edit approvers for your request.
   - To add a new approver, click **New**.
   - To manage approvers for your request, click **Edit**.
5. Submit the changes by clicking **Update**.

View and edit your product lifecycle requests - Legacy

View all your product lifecycle requests, track their status, and edit your existing requests. You can also manage the approvers for your request.

Before you begin

Important:

Starting with the Xanadu release, the legacy Technology Reference Model module is moved to the Enterprise Architecture Workspace. To learn more, see View or update your TRM requests.

Role required: sn_apm.apm_user

Procedure

1. Navigate to **All** > *Enterprise Architecture* > **Technology Reference Model** > **My Product Lifecycle Requests**.
   You can see all your product life-cycle requests and their approval status.
2. Click the name of an existing product request that you want to edit.
3. On the Request TRM Product Lifecycle form, fill in the fields.
   For field information, see TRM Product Lifecycle Request form.
4. In the Approvers section, add or edit approvers for your request.
   - To add a new approver, click **New**.
   - To manage approvers for your request, click **Edit**.
5. Submit the changes by clicking **Update**.

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Add or edit a TRM phase - Legacy

Define your own TRM phase or edit an existing TRM phase.

Before you begin

Important:

Starting with the Xanadu release, the legacy Technology Reference Model module is moved to the Enterprise Architecture Workspace. To learn more, see Manage TRM phases.

The user 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 **All** > *Enterprise Architecture* > **Technology Reference Model** > **Phases**.
2. Create or edit a TRM phase.
   - To create a TRM phase, select **New**.
   - To edit an existing TRM phase, select the name of the phase.

   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.
3. On the form, fill in the fields.
   For field information, see TRM Phase form.
4. Select **Submit** or **Update**.

Review the TRM lifecycle status in the Technology Portfolio Management page - Legacy

View the Technology Reference Model (TRM) lifecycle information along with the risk and technical debt information in the Technology Portfolio Management page.

Before you begin

Role required: sn_apm.apm_analyst

About this task

The lines in the Technology Portfolio Management (TPM) screen indicate the life cycles of the product versions. The lines are color coded, which indicates the stages of risk that the software model is in, at that month or quarter. The TPM page helps you to view the status of business applications and their technical debts.

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Procedure

1. Navigate to **All** > *Enterprise Architecture* > **Technology Portfolio Management (TPM)** > **Technology Lifecycles**.
2. Select a view grouped by Business Application or Software Model.
3. View the timeline across all the months in a year by clicking the **Monthly** button.
   By default, the **Quarterly** button is enabled to show the timeline for the four quarters of a year. Instead, the monthly view helps you to track the risk stage of a business application or software model for any month in a year.
4. Click the production icon () and view the production instances that are liable to risks in the current quarter or month.
5. Display the life-cycle data sources of software models.
   - To display the life-cycle data sources of a particular software model, click the expand icon () of the software model.
   - To display the life-cycle data sources of all software models related to a business application, click show all life-cycle data sources icon ().

     Use the icon to toggle between show and hide the data sources.

Configure the business application form for risk management - Legacy

Configure the business application form to enable application managers to provide risk and control information associated with a business application through a risk assessment questionnaire or a control attestation survey.

Before you begin
Role required: admin

Procedure

1. Navigate to **All** > *Enterprise Architecture* > **Application Portfolio** > **All Business Applications**.
2. Open a business application.
3. Click the **Additional actions** icon and select **Configure > Related Lists**.
4. Add **Risk Questionnaire**, **Risk Summary**, **Risk Response Tasks**, **Control Attestations**, **GRC Issues**, and **GRC Issue Remediation Tasks** to the **Selected** list and click **Save**.
5. Add the Take attestation column to the **Risk Questionnaire** and **Control Attestations** related lists.
   a. Click either the **Risk Questionnaire** or **Control Attestations** tab to access the associated related list.
   b. Click any of the columns and select **Configure > List Layout**.
   c. Add **Take attestation** to the **Selected** list and click **Save**.
   d. Repeat the steps for the other related list.

What to do next
Respond to a risk assessment questionnaire or control attestation survey

Respond to a risk assessment questionnaire - Legacy

Respond to a risk questionnaire to provide risk-related information for your business application to a risk manager.

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Before you begin

Role required: grc_business_user

Procedure

1. Navigate to **All** > *Enterprise Architecture* > **Application Portfolio** > **All Business Applications**.
2. Open a business application.
3. Select the **Risk Questionnaire** related list.
4. Click the **Take assessment** link.
5. Enter your responses in the form.
6. Click **Submit**

Take the control attestation survey - Legacy

Return the control attestation survey to provide information to verify that a control is implemented for a business application.

Before you begin

Role required: grc_business_user

Procedure

1. Navigate to **All** > *Enterprise Architecture* > **Application Portfolio** > **All Business Applications**.
2. Open a business application.
3. Select the **Control Attestations** related list.
4. Click the **Take assessment** link.
5. Enter your responses in the form.
6. Click **Submit**

Create a data domain - Legacy

A 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 the database catalog that lists all the catalog objects, or databases, discovered for an instance of a database.

Before you begin

Important:

Starting with the Xanadu release, the data domains module is moved to the Enterprise Architecture Workspace. To learn more, see Exploring data domains and Manage data domains.

Role required: sn_apm.apm_user

Although an Enterprise Architecture user (sn_apm.apm_user) can create a data domain, the access control on the Data Domain [sn_apm_data_domain] table is limited to its different users.

- The Application Portfolio Analyst and Application Portfolio Administrator with sn_apm.apm_admin role have create, write, and delete privileges.
- The Application Portfolio User with sn_apm.apm_user role has read access only.

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Procedure

1. Navigate to **All** > *Enterprise Architecture* > **Information Portfolio** > **Data Domains**.
2. Select **New**.
3. On the form, fill in the fields.
   For field information, see Data Domain form.
4. Select **Submit**.

What to do next

Create an information object and link the data domain with the information object.

Create an information object referencing a data domain - Legacy

Create an information object to capture the logical data for the business application. This data becomes information when it's applied to the business application.

Before you begin

Important:

Starting with the Xanadu release, the legacy information objects module is moved to the Enterprise Architecture Workspace. To learn more, see Exploring information objects.

Role required: sn_apm.apm_user

The Application Portfolio Analyst and Application Portfolio User can create information object, relate business application to information object, and relate information object to database catalog.

Procedure

1. Navigate to **All** > *Enterprise Architecture* > **Information Portfolio** > **Information objects**.
2. Select **New**.
3. On the form, fill in the fields.
   For field information, see Information Objects form.
4. Select **Submit**.

What to do next

After creating an information object, you must relate a business application to the information object with the CMDB CI suggested relationship.

Relate a business application to an information object - Legacy

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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About this task

Note:

Use the custom-built Add Relationship UI to relate the business application with the information object because this UI also captures the attributes in the relationship between the two configuration items. You should not use the CMDB relationship editor to associate the two configuration items because the create, read, update, and delete (CRUD) attributes of the relationship cannot be captured in the relationship editor.

Procedure

1. Navigate to **All** > *Enterprise Architecture* > **Application Portfolio** > **All Business Applications**.
2. Open a business application record.
3. To relate the business application with an information object, click the Information Object Attributes related list.
4. To add an information object, click **Add**.
5. On the form, fill in the fields.
   For field information, see Add relationship form.

   By adding an information object to the business application, not only a record is created in the CI relationship [cmdb_ci_rel] table, but the CRUD attributes are also captured in the CI Relation Attributes [cmdb_rel_attributes] table.
6. Click **Save**.
   To edit the CRUD relationship of an information object, select the record and click **Edit**. In the Manage Relationship pop-up, update the CRUD details.

   To delete the relationship between the business application and an information object record, select the record and click **Delete Relationship**. This action deletes the relationship record from the CI relationship table and also deletes the qualifier properties, if any, that are set in this relationship between the business application and the information object, which are captured in the CI Relation Attributes table.

   To check for information objects that are not linked to any business applications, run the Information Objects not related to any Business Application desired state audit on demand. For more information, see Information Objects not related to any Business Application.

What to do next

Relate the information object to the database catalog.

Relate the information object to the database catalog - Legacy

The information object draws the physical data from the database catalog, which references the database instances. Hence, create a relationship that is suggested between the information object and the database catalog.

Before you begin

Role required: sn_apm.apm_user

About this task

Suggested cmdb CI relationship, Depends on::Used by, relates the information object to the database catalog. The relationship works by drawing the physical data from the database and stores it as logical data in the information object table, which references the data domain.

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For example, employee payroll details depends on Oracle database instance. If the relationship is reversed between the configuration items, then Oracle database instance is used by employee payroll.

- IT Operations Management Discovery discovers all servers, instances, and databases.
- Database Catalog is a list of all the databases.
- The Database Catalog (cmdb_ci_db_catalog) lists all the catalog objects or databases that are discovered from an instance of a database. For example, Oracle catalog and MySQL catalog are child tables of the database catalog.
- The Database Instance (cmdb_ci_db_instance) is the parent table. Oracle Instance (cmdb_ci_db_ora_instance) and MySQL instance are child tables of the Database Instance.
- The reference between a database instance and a database catalog is one to many.
- Since the database instance is hosted on the Server (cmdb_ci_server), it can access all the underlying configuration items.

Note:

You may have applications, the data of which are not stored in a conventional database. You can also track such unstructured data stored in configuration item tables such as configuration file (cmdb_ci_config_file), file system (cmdb_ci_file_system), and exchange mail box (cmdb_ci_exchange_mailbox). Use the same Depends On::Used by relationship type between the information object and the unstructured data sources to track the data.

Procedure

1. Navigate to **All** > *Enterprise Architecture* > **Information Portfolio** > **Information Objects**.
2. To create a suggested relationship between the information object and the database catalog, open the information object record.
3. In the Related Items section of the Information Object form, click the add CI relationship icon () to launch the relationship editor and create the CI relationship.
   The filter is automatically applied on the database catalog.
4. Select the Depends on::Used By suggested relationship type.
5. In the Configuration Items section, select the record that is of a catalog class.
6. In the Relationships section, click the CI relationship icon ().
7. Click **Save and Exit**.

   Ensure that the database catalog table has a reference of the database instance.

What to do next

Click the show dependency views icon () in the **Information Object** related items to view the dependency of the business application that is using the information object, which is running on a database server.

Apply the information portfolio for auditing. Integrate with GRC (Governance, Risk, and Compliance) and use the information object as an entity. GRC uses any entity such as a database, server, or a business application to audit. Associating the information object as an audit entity gives you the complete profile of the business application that uses the information object and its source of data.

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Relate a business application to another business application - Legacy

Relate a business application to another business application using the CI relationship [cmdb_rel_ci] table of type Interfaced by::Interfaces. Use this suggested relationship to get the information of other business applications, which are interfaced with the business application.

Before you begin

Important:

Starting with the Xanadu release, the legacy business applications module is moved to the Enterprise Architecture Workspace. To learn more, see Add or edit a business application.

Role required: sn_apm.apm_user

Procedure

1. Navigate to **All** > *Enterprise Architecture* > **Application Portfolio** > **All Business Applications**.
2. To create a suggested relationship between the business applications, open a business application record.
3. In the Related Items section of the Business Application form, click the add CI relationship icon () to launch the relationship editor and create the CI relationship.
4. Select the Interfaced by (Parent) from the Suggested relationship types section.
   The filter is automatically applied on the business application.
5. In the Configuration Items section, select the record that is of a business application.
6. In the Relationships section, select the CI relationship icon () to create new relationship with selected configuration items.

   The Interfaced by::Interfaces relationship is added in the Relationships section.
7. Click **Save and Exit**.

What to do next

Click the show dependency views icon () in the **Business Application** related items to view the dependency of this business application interfacing or interfaced by other business applications.

Visualize Enterprise Architecture reports using CMDB Query Builder - Legacy

Enterprise Architecture uses CMDB Query Builder to query on a list of configuration items used in Enterprise Architecture and visualize them as reports.

Before you begin

Role required: sn_apm.apm_user

About this task

Enterprise Architecture takes advantage of CMDB Query Builder to build complex queries and retrieve data from CMDB CI classes, Enterprise Architecture tables, and configuration items that are associated to each other by different CMDB CI relationships.

Before launching the reports that fetch data from the tables and CMDB CI classes, you must run the respective scheduled jobs. These jobs are set as active with frequency as **On Demand**. However, update the frequency as per your requirement to daily, weekly, monthly, periodically, once, on demand, Business Calendar – entry start, or entry end, based on how often the data for

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the report should be updated. Set the frequency of these scheduled jobs accordingly. For more information, see Run scheduled jobs for CMDB Query Builder reports.

Note: Ensure to run these scheduled jobs from **Global** scope only. Only a system administrator can run these scheduled jobs from global scope. However, as an Enterprise Architecture user you can view the reports.

Procedure

1. Navigate to **All** > *Enterprise Architecture* > **CMDB Query Builder**.
   All reports that the base system offers are provided as menu options in the application navigator under CMDB Query Builder.
2. Click the relevant CMDB query builder name for which you want to view the report.

   The report opens in a new tab and is rendered as a bar chart, by default. You can view and save the report for future use.

   Note: The data displayed on the report is retrieved from the latest execution of the scheduled job run on demand.

3. Click each option to view the respective report.

   Note: You must activate the PPM Standard plugin to generate Projects on a Business Application CMDB query builder report.

   Enterprise Architecture base system provides the following list of queries to generate Enterprise Architecture reports:

   Business Capabilities provided by Business Application

   Application Services consumed by Business Application

   Business Applications providing a Business Capability

   Business Services provided by a Business Capability

   Business Applications using an Information Object

   Information Objects used by a Business Application

   Demands on a Business Application

   Projects on a Business Application

Related topics

Run scheduled jobs for CMDB Query Builder reports - Legacy

Export data to Microsoft PowerPoint - Legacy

Export the Application Portfolio Status data to Microsoft PowerPoint. Share the data with other stakeholders in the organization, like business owners, managers and solution architects.

Before you begin

Important: Export to PowerPoint is currently unavailable for customers in the FedRAMP, NSC DOD IL5, or Australia IRAP-Protected data centers, self-hosted customers, or in other restricted environments. Please check for availability updates in future releases.

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Role required: sn_apm.apm_user

Procedure

1. Navigate to **All** > *Enterprise Architecture* > **Application Portfolio Analysis** > **Export to PowerPoint for APM**.
2. Select a template from the drop-down list.
   The Enterprise Architecture Report template is provided from the base system.
3. Click **Download**.

Result

A PowerPoint deck with the Application Portfolio Status details is downloaded.

Application landscape reports - Legacy

When you export the Application Portfolio Status data to Microsoft PowerPoint, the following Application Landscape report types are exported to the PowerPoint deck.

Application Portfolio by Install Type

The Application Portfolio by Install Type report shows a graphical representation of the number of applications installed and the type of installation, such as Cloud, On-premises, and so on.

Application Portfolio by Platform

The Application Portfolio by Platform report shows a graphical representation of the number of applications categorized by their platform type, such as AWS, Microsoft Azure, ServiceNow, and so on.

Application Portfolio by Technology Stack

The Application Portfolio by Technology Stack report shows a graphical representation of the number of applications categorized by their technology, such as Java, SQL, and so on.

Note: The applications with no technology stack are displayed as <Empty>.

Application Portfolio by Category

The Application Portfolio by Category report shows a graphical representation of the number of applications and their categories, such as Customer Support, Finance, Marketing, and so on.

Most Used Applications by Application Family

The Most Used applications by Application Family report shows a graphical representation of the number of applications categorized by their organization, such as BMC, Microsoft Office, SAP BI and so on.

Note: Currently, the Application Portfolio by Application Family report displays 30 categories. Out of these 30 categories, 29 stacks show category names, and 1 stack is displayed as others (cumulative of remaining applications).

Application Portfolio by Install Type and Platform

The Application Portfolio by Install Type and Platform report shows a graphical representation of the number of applications and their install type, stacked by their platform.

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Capabilities landscape reports - Legacy

When you export the Application Portfolio Status data to Microsoft PowerPoint, the following Capabilities Landscape report types are exported to the PowerPoint deck.

Capabilities by Assessment (Top Scoring Capabilities)

The Capabilities by Assessment (Top Scoring Capabilities) report shows a graphical representation of the five top scoring capabilities of the organization.

Capabilities by assessment (Low Scoring Capabilities)

The Capabilities by Assessment (Low Scoring Capabilities) report shows a graphical representation of the five low scoring capabilities of the organization.

Connect a digital interface with CMDB API in Enterprise Architecture - Legacy

Create a relationship between a digital interface and a CMDB API. Use this relationship to find out the digital integration and API connection details and view the APIs that are created from the design specs of the digital interface. You can also find out the environments where the APIs are deployed, and group them as required.

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.

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** > *Enterprise Architecture* > **Application Portfolio** > **Digital Interfaces**.
2. Select an existing digital interface.
3. Select the **APIs** tab in the digital interface form.
4. Select **New**.
   On the Digital Interface to API form, fill in the fields. For field descriptions, see Digital interface to API form in Enterprise Architecture (formerly APM). Information for the fields Environment, Lifecycle Stage, and Lifecycle Stage Status are derived from the API.
5. Select **Save**.

Integrating Enterprise Architecture (formerly Application Portfolio Management) with other applications - Legacy

Understand the process required to set up Enterprise Architecture to work with key applications in the ServiceNow platform to provide a deep insight into the applications.

Integrate with Governance, Risk, and Compliance to identify application risks and controls - Legacy

Enterprise Architecture (formerly Application Portfolio Management) integrates with Governance, Risk, and Compliance (GRC) to help identify and assess risks on business applications.

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Before you begin
Role required: admin

About this task
Using GRC application, you can analyze the risks associated with assets such as hardware, software, and business application. You can also identify and test controls associated with those risks as well as look at the audits that were conducted on those assets. This analysis helps the application owners to understand the risk of the business application effectively.

The application owner can identify significant risks and compliance issues that the business applications are exposed to, without having to engage an external auditing system and run the applications through the auditing process.

Activate the following plugins to integrate Enterprise Architecture with GRC.

Procedure
1. Navigate to **All** > **System Definition** > **Plugins**.
2. Install the GRC: GRC Profile Dependencies (com.snc.grc_profile_dep) plugin.
3. Install the GRC: Vendor Risk Management Dependencies (com.snc.grc_vrm_dep) plugin.
4. Install GRC: Policy and Compliance Management Dependencies (com.snc.grc_policy_dep) plugin.

   This also requires installation of app-compliance from the ServiceNow app store.

   Note: The integration also requires certain applications that should be installed from the ServiceNow app store. See Request apps on the Store for instructions to download and activate them.

What to do next
Create an entity referencing the business application. Attach the entity to an audit.

Create an entity for audit referencing business application - Legacy

Create an entity with reference to the business application table and its specific application record. Use the entity to scope risk exposure and perform risk assessments on business applications.

Before you begin
Role required: sn_audit.admin or sn_audit.manager

About this task
GRC uses the term, **entity**, instead of profile. An entity can be anything such as a database, server, or a business application that can be audited.

Procedure
1. Navigate to **All** > **Audit** > **Scoping** > **All Entities**.
2. Click **New**.
3. On the form, fill in the fields.
   For field information, see Entity Form.
4. Click **Submit**.

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Associate a risk to the entity - Legacy

Attach the entity to a risk and create a risk record. Assess and identify risks that can adversely affect your business applications.

Before you begin

Role required: sn_risk.admin and sn_risk.manager

Procedure

1. Navigate to **All** > **Risk** > **Risk Register** > **All Risks**.
2. Create a risk in the Risk form.

   See: Create a risk manually.

   Note:

   Relate the risk to the entity in the **Entity** field.

Add business application entity to an engagement - Legacy

The entities are assessed and evaluated for audit engagement. After which the entities that are scoped for audit engagement and validated are associated to an audit.

Before you begin

Role required: sn_audit.manager or sn_audit.admin

To add a business application entity to an engagement, you should have created an entity referencing the business application in the **Entity** field of the Entity form. See: Create an entity for audit referencing business application.

Procedure

1. Navigate to **All** > **Audit** > **Engagements** > **All Engagements**.
2. To add the business application entity to the engagement, click **Add** button in the **Entities** related list.

   Note: The engagement must be in **Scope** or **Validate** state.

   See: Add profiles to an engagement scope.

   When an application profile is attached to an engagement, an engagement record with the associated profile is created in Profile to Engagements [sn_audit_m2m_profile_engagement] table.

Add a control to the business application entity - Legacy

Associate a control to a business application entity that might be at risk. It is mandatory that you set effective control on the business applications to mitigate risks and protect your business. As you upgrade your business applications, you can replace your outdated controls.

Before you begin

Role required: admin

You should have created an entity before associating a control to it. Controls are created in GRC.

Procedure

To create a control and add an entity to the control, see Create a control.

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- The entity that you select from the Controls [sn_compliance_control] table must be a business application and the entity **Class** of the record must be application.
- The control record can be either in the **Draft** or **Retired** state. However, controls in such states are not visible in Enterprise Architecture (formerly Application Portfolio Management) to be associated to a business application.

View Governance, Risk, and Compliance risks and engagements for business application - Legacy

As an application owner, you can view the risks that a business application is exposed to. Governance, Risk, and Compliance (GRC) audits the business application entity and the audited risks and engagements are captured as scripted related lists in the business application form.

Before you begin

Role required: sn_apm.apm_user, sn_apm.business_stakeholder_apm_user

Procedure

1. Navigate to **All** > **Enterprise Architecture** > **Application Portfolio** > **All Business Applications**.
2. Click **GRC Risks** related item.
3. View the name of the risk statement, its description, the category of risk (legal, financial, operational, and so on), inherent impact that indicates the levels of risk, and inherent likelihood that indicates the likelihood of the risk occurring.
   See: Manage risks, risk statements, and risk frameworks
4. Click **Engagements** related item.
5. View the name of the engagement, the user to whom it is assigned, the state in which the engagement is, planned start date on which the activity should begin, its end date, the percentage of engagement completed, and the actual cost of the engagement.
   See: Manage engagements
6. Click **Controls** related item.
7. View the name of the control, its owner, status of the control whether it is compliant or not, the classification of the control whether it is preventive, corrective, or detective, and the attestation frequency at which the scheduled job runs.

   See: Manage controls
8. Click display/hide hierarchical lists arrow beside a risk record in the GRC Risks related list to view all the controls that you have associated to the risk of the business application.

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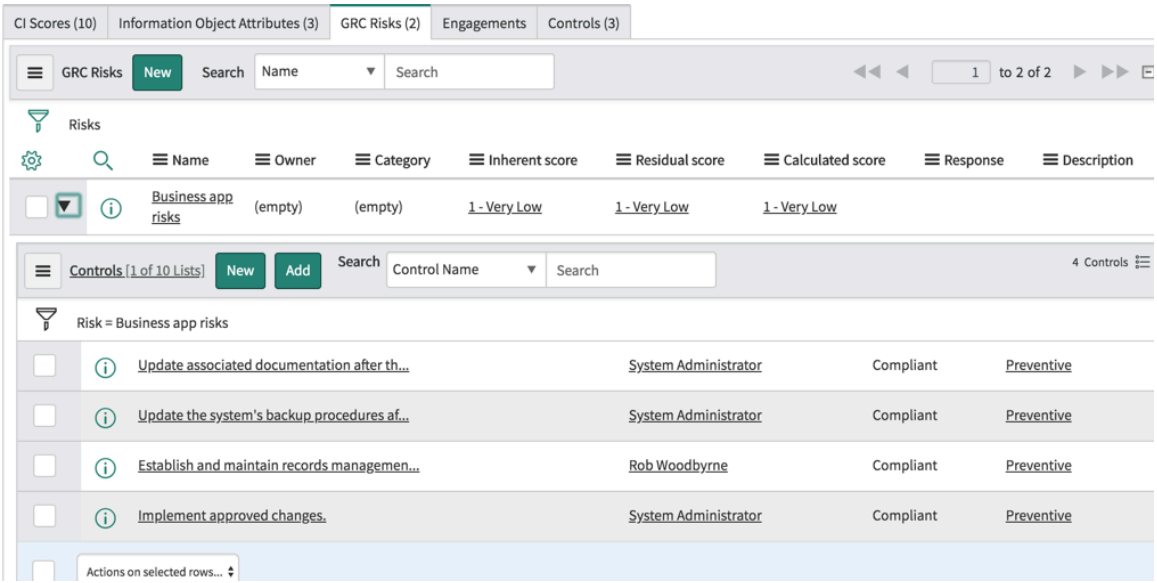
When you associate a control to a risk, the control with its associated risk is created in Risk to Control [sn_risk_m2m_risk_control] table.

Controls associated to a risk



Use similarity solution to categorize applications and integrate with service catalog - Legacy

Use the machine-learning engine to suggest a category for a business application that you are registering into the Enterprise Architecture inventory.

Before you begin

Role required: sn_apm.apm_user

About this task

Using the Register a Business Application form to on-board an application in Enterprise Architecture (formerly APM) is similar to requesting an item from Service Catalog category.

Procedure

1. Navigate to **All** > **Enterprise Architecture** > **Business Application Lifecycle Management** > **Business Application Catalog**.
2. Click the **Register a Business Application** card to register a new business application.
3. Enter the details in the Register a Business Application form.

   Mandatory fields have a red asterisk (*) beside them.

Register a Business Application form

Field	Description
Enter the name of the business application	Name of the business application that you are requesting or registering.
Benefit or use of the business application	Purpose of the business application.
IT Owner of the Business Application	Name of the IT owner of the application.
Business Owner of the Business Application	Name of the business owner of the application.

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As you enter the name and the benefit of the business application, the similarity solution of the machine-learning algorithm is triggered to search for a similar business application from the business applications table [cmdb_ci_business_app]. Once the engine finds similar records, you can see a message on top of the form indicating that the ML found similar records in the applications table. Based on the findings the engine suggests a category for the application that you are registering. It also displays the suggested category in the **Category of the business application** field under which the business application can possibly be grouped.

If you choose to select the category predicted and suggested by the machine-learning solution, then the application category is stored in the **ML Predicted Category** field of the Business Application Requests table [business_app_request] for future analysis.

4. Select the ML suggested category if it is suitable.
5. Click **Submit**.

Enterprise Architecture (formerly Application Portfolio Management) integration with Lucidchart - Legacy

Create enhanced architectural diagrams for your Business Applications and Business Capabilities in Lucidchart and access them from your ServiceNow instance.

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 (formerly APM).

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, 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

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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

Install Enterprise Architecture integration with Risk Management and Enterprise Architecture integration with Policy and Compliance - Legacy

Install Application Portfolio Management integration with Risk Management and Application Portfolio Management integration with Policy and Compliance from the ServiceNow Store.

Before you begin

Role required: admin

Before installing Application Portfolio Management integration with Risk Management and Application Portfolio Management integration with Policy and Compliance, download and activate the Governance, Risk, and Compliance (GRC) application from the ServiceNow Store. For more information, see the Download a GRC application from the ServiceNow Store for the first time topic.

About this task

Activate the following plugins:

Name	Description
Application Portfolio Management integration with Risk Management (com.snc.apm_risk_assessment)	Activates the Application Portfolio Management integration with the GRC Risk Management plugin.
Application Portfolio Management integration with Policy and Compliance (com.snc.apm_control_management)	Activates the Application Portfolio Management integration with the GRC Controls plugin.

Procedure

1. Navigate to **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 ServiceNow store.

   Visit the ServiceNow Store website 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. Click **Install**.
4. In the Application installation dialog box, review the application dependencies.

   Dependent plugins and applications are listed if they will be installed, are currently installed, or need to be installed. If any plugins or applications need to be installed, you must install them before you can install GRC - Application Risk Assessment.
5. **Optional:** If demo data is available and you want to install it, click **Load demo data**.

   (Optional) Demo data comprises sample records that describe application features for common use cases. Load demo data when you first install the application on a development or test instance.

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Important: If you don't load the demo data during installation, it's unavailable to load later.

6. Click **Install**.

Governance, Risk, and Compliance (GRC) roles required for Enterprise Architecture (formerly Application Portfolio Management (APM)) - Legacy

Add roles to the sn_apm.apm_user role to be able to access GRC information from Enterprise Architecture.

Role	Description
risk_reader	Enables read access to the GRC Risks, Risk Summary, and Risk Response Tasks tabs.
compliance_reader	Enables read access to the Controls, GRC Issues, and GRC Issue Remediation Tasks tabs.
sn_audit.user	Enables read access to the Audit Engagements tab.
grc_business_user	Enables an application owner to respond to a risk assessment questionnaires and control attestation surveys.

For information on how to assign a role to a user, see the Assign a role to a user topic.

Enterprise Architecture (formerly Application Portfolio Management) reference

Reference information to provide additional details about Enterprise Architecture such as the fields, user roles, tables, guidelines, and domain separation information.

Business stakeholder role for Enterprise Architecture (formerly APM)

For Enterprise Architecture users, Business Stakeholder (com.snc.business_stakeholder) plugin contains the business stakeholder role for Enterprise Architecture. Users with this role can approve, view or read records of tables that are used to retrieve data for reports and dashboards. Customers can assign this role to any user who is a business stakeholder to review and approve reports.

Upgrade information

Upgrade customer

If you are upgrading to Zurich, the business stakeholder role for Enterprise Architecture is available only when you activate Read only roles for Enterprise Architecture (com.snc.apm_read_roles) plugin.

New customer

If 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 is available only when you install Enterprise Architecture plugin.

Why business stakeholder read-only role

Analyst (sn_apm.apm_analyst) role in Enterprise Architecture is a licensable role that requires subscription. Users with this role can access all Enterprise Architecture PA dashboards and this

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role contains Enterprise Architecture administrator role who has different levels of access not only to read but to approve and update information data. Organizations procure this licensable role in limited numbers as it comes with a price. Business stakeholder role comes with a similar function but access is controlled at read-only level. Users with this role can access reports to review and approve only.

Share dashboards with business stakeholder read-only users

Enterprise Architecture users with Business stakeholder role for Enterprise Architecture (sn_apm.apm_read) role have read-only access to dashboards and reports and all the underlying tables of the dashboards.

The base system provides access to users with this role to view **Application Landscape**, **Application 360**, and **Application Assessments** dashboards. You can also access all the tables from where the data are retrieved for these dashboard reports.

However, you can also configure your custom-created dashboards and reports to provide users with business stakeholder role. To provide read-only access to a business stakeholder, follow the steps in Share a responsive dashboard

Share widgets in dashboards with business stakeholders

To share individual widgets in the dashboard with the user who has the business stakeholder read-only role,

1. Navigate to **Enterprise Architecture** > **Application Portfolio Analysis** > **Dashboard**
2. Click the add widgets icon.
3. Click the edit content icon of the widget that you want to share.
4. Click the sharing icon.
5. Click the **Share** option in the Sharing section.
6. Search for business_stakeholder in the search field and click to add the role in the Sharing settings window.
7. Click **OK**.

Enterprise Architecture tables accessible to users with business stakeholders role

Users with Business stakeholder role for Enterprise Architecture can access the following tables that store the data to load the widgets in the Enterprise Architecture dashboards:

Enterprise Architecture tables

Label	Table name
Business Application	cmdb_ci_business_app
Business Capability	cmdb_ci_business_capability
CMDB Relationship	cmdb_rel_ci
CI Score	apm_app_score
Indicator Score	apm_app_indicator_score
Indicators	apm_metric
Fiscal Year	fiscal_period

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Enterprise Architecture tables (continued)

Label	Table name
Business Process	cmdb_ci_business_process
Application Family	apm_application_family
Application Category	apm_application_category
Application Category Groups	apm_application_category_group
Scoring Profiles	apm_application_profile
Portfolio	pm_portfolio

Application Classification Example

An example of the application classification into groups and categories to identify relationships and redundancies.

Scenario using Application Classification

The following table displays an example in which applications are classified on the basis of category, family, and software products.

Business Application	Business Process (L1)	Application Category Group	Application Category	Application Family	Software Products
Oracle EBS Order Management	Quote to Cash	Sales and Distribution	Order Management	Oracle EBS SCM	Oracle EBS R12.2 Order Management
Oracle EBS General Ledger	Financial Plan to Report	Financials	General Ledger	Oracle EBS Financials	Oracle EBS R12.2 Financials

Related topics

Application classification - Legacy

Business Process Form

A Business process is a method of related structured tasks performed to complete a specific application service.

Business Process Form Fields

Field	Description
Name	Unique name for the business process.
Asset tag	Inherited CMDB field. This field is typically used for physical assets and is not applicable to business process records. You can leave this field empty when creating or updating a business process.

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Field	Description
Assigned to	Person using or responsible for the item.
Category	Category of the business process.
Fault count	Number of faults.
Installed	Date and time when the business application is installed.
Install Status	Operational status of the business process. Use this field to indicate whether the process is active or no longer in use. Common values include: • Installed (active) • In Maintenance (temporarily suspended) • Retired (no longer used) Other values may appear due to CMDB inheritance and are not typically relevant for business processes.

Related topics

Add or edit an application business process - Legacy

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.
Description	Description of the action.
Strategy	Plan to implement the action.

Certification Schedule form

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.

Certificate Schedule form fields

Field	Description
Name	Name of the certification schedule.
Filter	Select a filter for the table data.

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Field	Description
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.
Group	Select a group from the choice list.

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Field	Description
Assign to empty	Select a value from the choice list: • **Do Not Create Task**: Certification task isn't 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 can't 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 certifies the percent is calculated. The system administrator can track the progress of the data certification task.

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Certification Instances section fields (continued)

Field	Description
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

Schedule a data certification task - Legacy

Business Application Form

Enterprise Architecture (formerly APM) 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	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 activate 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. • **End-user computing**: The application is used by end users to perform their daily tasks. • **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.

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Field	Description
Publisher	Name of the application publisher.
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 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 **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: • 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.

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Field	Description
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 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.
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.

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Planned Disposition section form fields

Field	Description
Planned Disposition	Planned disposition of a business application. Use the following options: • Invest • Sustain • Migrate • Retire
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 • Replatform • Repurchase • Refactor
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 managing the business application.
Managed by group	User group managing the business application.
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

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Owners section form fields (continued)

Field	Description
	for which you're the owner in the **My Applications** menu.
Last updated by	Person who last updated the application record.
Supported by	User supporting the business application.
Support group	User group supporting the business application.

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. Category of data. The base system provides Internal, Public, Confidential, and Highly Sensitive categories. 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 - Legacy

Create digital integration form

Use the Create Digital Integration form to create a digital integration between two business applications.

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Create Digital Integration form

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.
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. It's 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.
Digital Integration Name	Name of the digital integration. This field is auto-populated when the **Subscriber Business Application**, **Provider Business Application**, and **Digital Interface** fields are selected. You can modify the auto-populated name.
Type	Type of the integration. Use the following options:

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Create Digital Integration form (continued)

Field	Description
	• 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
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

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Create Digital Integration form (continued)

Field	Description
	• On Demand • Real Time
Business Owner	Business owner of the integration.
Description	Description of the digital integration. Describe in detail why the integration is being created between two business applications or between an external service provided interface and a business application and how and what business value it adds.

Related topics

Digital integrations

Create a digital integration

Update digital integration form

Use the digital integration form to update the digital integration between two business applications.

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. 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. 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, it doesn't refer to the data flow direction (incoming, outgoing, bidirectional). It's managed by the Data Flow Direction attribute. This field is automatically generated and can't be edited.

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Digital Integration form (continued)

Field	Description
Subscriber Digital Interface	Name of the r 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. 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.
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. It helps Application Owners and Architects to

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Digital Integration form (continued)

Field	Description
	look up which version of an Integration is in use or should 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 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. Describe in detail why the integration is being created between two business applications or between an external service provided interface and a business application and what business value it adds.

Functional section fields

Data flow direction	Direction of the data flow in the integration. Use the following options: • Outgoing - Data flow from the Provider business application to the Subscriber business application. • Incoming - Data flow from the Subscriber business application to the Provider business application. • Bidirectional - Data flow in both the directions between the Provider and Subscriber business applications.
Trigger	How to trigger the integration. Use the following options: • Manual • Scheduled

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Functional section fields (continued)

	• 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.
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

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Business Impact section fields (continued)

Field	Description
	• High • Critical
Confidentiality	Confidentiality level of the integration. Use the following options: • 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

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.

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Activities section fields

Field	Description
Work notes	Comments about the integration.

Related topics

Update a digital integration

Request digital integration form

Request a digital integration to enable integration between two business applications.

Request a digital integration form

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. Hence it is affected by the changes or an outage face connection or data loss. **Note:** Being a provider or subscriber business application it does not refer to the data flow direction (incoming, outgoing, or bidirectional). It is managed by the Data Flow Direction attribute.
Subscriber Digital Interface	Name of the digital interface that subscribes for the integration.
Provider Business Application	Name of the business application that provides the digital interface and allows 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 does not refer to the data flow direction (incoming, outgoing, or bidirectional). It is managed by the Data Flow Direction attribute.
Provider Digital Interface	Option to create a new digital interface. It is a placeholder digital interface that will be 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.
Digital Integration Name	Name of the digital integration.

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Request a digital integration form (continued)

Field	Description
	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.
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.
Type	Type of the integration. Use the following options: • Data Integration – Use this option when the integration needs to 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
Description	Description about the digital integration. Describe in detail why the integration is being created between two business applications or between an external service provided

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Request a digital integration form (continued)

Field	Description
	interface and a business application, And how and what business value it adds.

Related topics

Use Business Application Lifecycle Management to request a digital integration

Application model lifecycle form

The application model lifecycle helps you to better manage lifecycle of a business application.

Application model lifecycle form fields

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 lifecycle. Use the following options: • Internal • Publisher
Lifecycle phase	Phase of the lifecycle. Use the following options: • General Availability • End of sale • End of support • End of extended support • End of life
Source	Source of the lifecycle. This field is auto-generated from the business application form.
Phase start date	Start date of the business application lifecycle phase.
Phase end date	End date for the business application lifecycle phase.
Risk	Risk associated with the application lifecycle. Use the following options: • Very high • High • Moderate • Low • None

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Field	Description
Active	Option to activate the lifecycle.
Description	Short description of the application lifecycle.

Related topics

Manage the life cycle of a business application - Legacy

Data classification form

The data classification tags help admin users to better control the data used by the business applications.

Data classification form fields

Field	Description
Name	Name of the data classification.
Description	Short description of the data classification.
Data Classification Group	Group name that the classification will be a part of.
Active	Option to activate the classification.
Application	Application name for which you're creating the data classification. This field is auto-populated based on the application scope set in the instance.
Order	Order of the classification to appear.
Color	Color of the classification tag.

Related topics

Add a data classification - Legacy

Data classification group form

The data classification groups help admin users to categorize the classification tags of an information object.

Data classification group form fields

Field	Description
Name	Name of the data classification group.
Description	Short description of the data classification group.
Allow Multi Selection	Option to enable multiple data classifications selection.
Application	Application name for which you're creating the data classification. This field is auto-populated

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Field	Description
	based on the application scope set in the instance.

Related topics

Add a data classification group - Legacy

Entity Form

Entity is used to scope risk exposure and perform risk assessments on business applications.

Entity Form fields

Field	Description
Name	Name of the profile.
Owned by	Owner of the profile.
Applies to	Business application table where all the business application records are stored. In the dialog box that opens up, enter the business application table in the **Table name** field and the business application record in the **Document** field.
Active	Check box to activate the entity.
Class	Profile class to which the application belongs.

Related topics

Create an entity for audit referencing business application - Legacy

Create architectural artifact form

Architectural artifacts describe a system, solution, or state of an enterprise. The Architectural artifacts in Enterprise Architecture (formerly APM) 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 users to access the artifacts by referenced records. When an artifact is associated to a business capability or business application, any Enterprise Architecture user who can access those business entities can also have access to the artifacts associated with those business entities.
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

- Architectural artifacts - Legacy
- Create or edit an architectural artifact - Legacy
- Create or edit an architectural artifact from Portfolio page
- Add or edit an architectural decision record (ADR)

Create related entities form

Enterprise Architecture (formerly APM) enables the Enterprise Architects to associate an architectural artifact to existing elements in the ServiceNow AI Platform, such as business capabilities or business applications. These associations creates a relationship between the artifact and related entities.

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 or a business capability.

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Related Entities form (continued)

Field	Description
Target Record	Name of the particular business application or business capability to which you want to associate the artifact.

Related topics

Associate an artifact to a business entity - Legacy

Add a related entity to an architectural artifact

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

Architectural artifacts version form

Enterprise Architecture (formerly APM) enables Enterprise architects to create multiple versions of architectural artifacts and send for approval. There can be only one approved version for each artifact.

Architectural artifacts version form fields

Field	Description
Architectural Artifact	Name of the Architectural Artifact.
File type	File type as either a URL or attachment. Do one of the following. • To upload a file, select#**Attachment**, click the attachment icon , and then select the file. • To link to a document, select#**URL** #and provide the link.
State	State of the artifact version. This field is automatically set to Draft.

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Related topics

Create an artifact version - Legacy

Create diagram form for 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
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.
Diagramming Tool	The tool that you use to create the diagram. Use the following options: • ServiceNow Modeling • Lucidchart
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.
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.
Entities	Entities that are included in the chart. Select the following to include in the diagram:

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Field	Description

	• Application Service
	  ○ Hardware Model
	  ○ Software Model
	• 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.

Related topics

Create a diagram for a business application - Legacy

Create diagram for a business capability

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.

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Field	Description
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**.
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 Lucid diagram for a business capability - Legacy

Demand form to retire an application

An Enterprise Architecture (formerly APM) user can raise a request to retire an application if the application is no longer in use.

Demand form fields

Field	Description
Action	Retire Application.
Name	Name of the business application to be retired.
Category	Operational.
Type	Project.

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Related topics

Manage Business Application Lifecycle Management service requests - Legacy

Request Architecture Review form

Enterprise Architecture (formerly APM) users can request the architecture review board to review a new architecture design proposal based on the technology of a business application.

Request Architecture Review form fields

Field	Description
Business Application	Name of the business application for which an architecture review is requested.
Project	Project that you can tie to this business application for which the architecture review is requested. **Note:** The projects that you own as a project manager appear in the list. The **Project** field appears only when the PPM Standard plugin is activated.
Short Description	A short description explaining the reason for the architecture review.
Architecture Review Requested Date	Date to hold the architecture review. The architecture review date must be in the future. You can attach blueprints or supporting documents for the review.

Related topics

Use Business Application Lifecycle Management to request an architecture review - Legacy

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.

Important:

Starting with the Xanadu release, the application indicators module is moved to the Enterprise Architecture Workspace. To learn more, see Manage indicators. To view the updated indicator form fields, see Create indicator form.

Role required: sn_apm.apm_admin

Indicator form fields

Field	Description
Name	Name of the application indicator.

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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 according to your requirements.
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. The indicator frequency must match the fiscal period being scored for the **Target maximum** and **Target minimum** values to be applied during normalization. If the frequencies don't match, the system uses dynamic normalization instead.
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.
Direction	Business application with maximum or minimum values. Select Minimize if lower values are better. Select Maximize if higher values are better.
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. When the check box is cleared, values for target maximum and target minimum are considered based on the intelligent logic. The target maximum and target minimum values are applied only when the indicator frequency matches the fiscal period being

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Field	Description
	scored. If the frequencies don't match, the system uses dynamic normalization regardless of whether this check box is selected.
Short description	Short summary of the application indicator.

Datasource Configuration section fields

Field	Description
Default breakdown	Name of the Performance Analytics breakdown.
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. • **Custom Script**: Allows you to write a script that collects data from another application. • **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. To view results of survey assessments within APM, see Generate survey assessments and view results within APM. • **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.

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Datasource Configuration section fields (continued)

Field	Description
	Note: If the collection frequency of the application indicator isn't greater than the frequency at which the data of the Performance Analytic indicator is 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`. For more information, see Collection of PA indicator score data.
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.

Custom script	The **Custom Script** field appears when **Custom Script** is selected from the **Data source** list.
	
	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");`

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Datasource Configuration section fields (continued)

Field	Description

	``
	gr.addEncodedQuery("opened_at BETWEEN" + 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;
	``

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.
Query table	Table from which the queries are filtered.
Query conditions	The conditions based on which the query is filtered.
Aggregate field	The field from the selected table is displayed for the records that match the query conditions.
Aggregate type	Type of aggregation applied for calculation of indicator scores. The available options are: • **Sum** • **Count** • **Avg**

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Datasource Configuration section fields (continued)

Field	Description
	• **Min** • **Max**
Group by	Categorize the data returned by the query, based on values of a specific field in the query table. For example, if you want to group the data by the life cycle stage status of applications, select Life Cycle Stage.
Consolidation field	The field from the query table on which the computational method for aggregating the values is applied.

Related topics

Create or edit an indicator to assess an application - Legacy

Scoring Profile form

Create an application scoring profile and update the default application profile with new profile indicators as per business requirements.

Scoring profile form fields

Field	Description
Name	Name of the application profile.
Readjust Weightage	Option to adjust the weightage proportionately among the relevant indicators of the business application.
Description	Description of the application profile.
CI Class	Configuration item type for which the score is generated.

Related topics

Create an application score profile and attach profile indicators - Legacy

Scheduled Script Execution form

The script to recalculate the scores of all indicators, the scoring profiles to which these indicators are attached, and the business applications that are associated to these scoring profiles.

Scheduled script execution form fields

Field	Description
Name	Name to identify this scheduled script execution.

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Field	Description
Active	Option to activate the script at the scheduled date and time. By default the job is inactive.
Run	The type of schedule to execute the script on. Choices are: • Daily • Weekly • Monthly
Day	If you select Weekly or Monthly from the Run list, then the Day field appears. • If Run is Weekly, then the day of the week. • If Run is Monthly, then the day of the month.
Time	Time at which the script runs on a 24-hour clock. If Run is Weekly or Monthly, the value includes the time of day.
Conditional	Option for executing only if certain conditions are met.
Run this script	The script to run at the scheduled date and time. You need not edit the script.
Run as	Select another user to run the script execution as. Configure the form to add this field if it is not present.

Related topics

Schedule a job to compute application scores - Legacy

Select Chart Dimensions form

This form helps to change the configurations of a bubble chart.

Select chart dimensions form fields

Field	Dimension
X and Y	Dimension of the indicators that fall in the X and Y axes. Along with the pre-configured dimensions, you can also view the bubble chart that you create using the Application bubble chart form.
Bubble Size	Indicator scores determine the size of the bubble.

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Field	Dimension
Display bubble labels	Enable to display the bubble labels in the Bubble chart. Helps to have a clear display of bubbles, uncluttered by their labels when there are many bubbles in a quadrant.

Related topics

Analyze application scores in a bubble chart - Legacy

Application bubble chart form

A bubble chart helps the admin to compare and evaluate the relative standing of application in selected categories.

Application bubble chart form fields

Field	Description
Name	Name of the application bubble chart.
Top left label	Application strategy in the top left label.
Top right label	Application strategy in the top right label.
Bottom right label	Application strategy in the bottom right label.
Bottom left label	Application strategy in the bottom left label.
Top left color	Color for the bubble in the top left quadrant. The color fields accept string inputs including hex code or RGB notation.
Top right color	Color for the bubble in the top right quadrant. The color fields accept string inputs including hex code or RGB notation.
Bottom right color	Color for the bubble in the bottom right quadrant. The color fields accept string inputs including hex code or RGB notation.
Bottom left color	Color for the bubble in the bottom left quadrant. The color fields accept string inputs including hex code or RGB notation.
Quadrant label color	Color for the label. The color fields accept string inputs including hex code or RGB notation.

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Field	Description
X Indicator	An application indicator for the X axis. You can also create an application indicator by clicking the **New** button in the Application Indicators form.
Y Indicator	An application indicator for the Y axis.
Z Indicator	An application indicator for the Z axis.
X Label	Label for the X axis. For example, if your **X Indicator** is CSAT, then you can label it as Customer Satisfaction Score.
Y Label	Label for the Y axis.
Z Label	Label for the Z axis.

Related topics

Create or edit a bubble chart for application strategies - Legacy

Goal form

Use the Goal form to create goals for your organizational strategic priorities.

Goal form fields

Goal form

Field	Description
Name	Name of the goal.
State	State of the goal. The state can be **Draft**, **In progress**, **Approved**, **Complete**, **Pending**, **Achieved**, **Not Achieved**, or **Cancelled**.
Parent goal	Name of the parent goal that this goal contributes to.
Strategic priority	Name of the strategic priority that this goal is created for.
Start date	Start date for the goal. By default, the start date of the current quarter is populated. For a subgoal, start date of its parent goal is populated.
End date	End date for the goal. By default, the end date of the current quarter is populated. For a subgoal, the end date of its parent goal is populated.
Owner	Owner of the goal. By default, the name of the user creating the goal is populated.
Category	Category of the goal. The available options are: • **Total Applications** • **Total Cost** • **Opex**

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Goal form (continued)

Field	Description
	• **Capex** • **Cloud Applications** • **Homegrown Applications** • **Support Cost** • **Labor Cost** • **Standards Compliance** • **Strategic** • **Operational** • **Tactical** • **Artificial Intelligence**
Status	Status of the goal. Status can be **Red**, **Yellow**, **Green**, or **None**.
Contributors	Users who contribute to the achievement of the goal.
Team	Assignment group responsible for different activities in achieving the goal.
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** **Note:** This field is available only when the **sn_gf.weighted_average_enabled** system property is set to **Yes**.
Progress	Percentage complete for the goal. The progress value is calculated automatically if the goal has sub-goals or/and targets. For more information on how the progress value is calculated, see Progress value calculation.
Assigned entity type	Entity type to which the goal is assigned. For example, Business Unit, Department, Company, or Portfolio.
Assigned entity	Entity to which the goal is assigned.
Comments	Detailed comments for the goal to facilitate collaboration.

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Goal form (continued)

Field	Description
Classification	Goal classification type. The available options are **Environmental**, **Social**, and **Governance**. This field is applicable only for the Operational Sustainability Workspace users.

Related topics

Create a goal for an application strategy - Legacy

Update Goal form

After assessing the applications and deciding on strategies, an admin can update goals to maximize or minimize depending on the indicators for the selected fiscal period.

Update goal form fields

Field	Description
Planned achievement	Percentage of the target that you plan to achieve.
Actual achievement till date	Current percentage achieved.
Comments	Comments, if any.

Related topics

Create a goal for an application strategy - Legacy

Demand form

Use a demand as a step to identify cost saving opportunities on the applications or capabilities and to meet the target. The strategy that you associate with the demand action decides the strategy for the application.

Demand form fields

Demand form

Field	Description
Action	Course of action for the new demand. **Note:** The **Action** field is available only when you launch the form within the Enterprise Architecture module and that is when the Enterprise Architecture plugin is activated.
Name	Name of the demand.
Category	Category of the demand.

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Demand form (continued)

Field	Description
	• Strategic • Operational
Type	Type of demand: • Project • Enhancement • Change • Defect The **Category** field selection determines the options available in the **Type** field.
Number	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
Submitted by	Name of the user who submitted the demand.
Program	Name of the program to which the demand belongs.
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.
Department	Department in a business unit to which the demand submitter belongs. If no value is chosen in this field, it's auto-populated with the name of the department to which the submitter belongs.
Business Unit	Business unit to which the demand submitter belongs.
Impacted Business Units	Business unit that is impacted by the submitted demand.
Business Capabilities	One or more business capabilities to associate the demand with.
Business Applications	Business application that you add to the demand.

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Details section form fields (continued)

Field	Description
	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.

Note: Additional fields such as State, Priority, Approval information, or Financial and schedule details may appear depending on your demand workflow configuration and enabled SPM plugins. These fields are managed as part of the demand lifecycle and are not required during initial demand creation from Enterprise Architecture.

Related topics

- Create a demand towards achievement of goal - Legacy
- Create a demand towards achievement of a capability
- Add or edit a demand

Program form

Create a program, link it to the goal that you created, and associate a program manager to the program. After you create a goal, you should have a program to achieve the goal that you created.

Program fields

Field	Description
Program Name	Unique name for the program.
Primary goal	Primary goal that is to be achieved for the program.
Program manager	Name of the program manager.
Portfolio	Portfolio to which the program belongs.
Number	A unique, auto-generated identification number for the program.
State	State of the program. Use the following options: • Pending • Open • Work in progress • Closed complete • Closed incomplete • Closed skipped
Description	Detailed description of the program.

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Dates section fields

Field	Description
Planned start date	Intended date for the program to begin.
Planned end date	Intended date for the program to end.
Planned duration	Expected duration of the program in days and hours.
Actual start date	Date on which the program actually begins.
Actual end date	Date on which the program actually ends.
Actual duration	Duration of the program in days and hours, from its start to closure.

Financials section fields

Field	Description
Total planned cost	An estimate of the cost of the program.
Actual cost	Actual cost of the program.
Budget cost	Budgeted cost of the program.
Planned benefit	Benefit received from the program.
Planned returns	Planned financial returns of the program.
Planned ROI %	ROI percentage associated with the program.

Related topics

Create a program for an application goal - Legacy

Goal Contribution Target form

The Program Navigation page guides you in setting a goal target for the fiscal years to achieve the goal.

Goal Contribution Target form fields

Field	Description
Program	Name of the program.
Fiscal Year	Fiscal period for which the goal is set.
Active	Check box to enable the program.
Target Goal Contribution %	Percentage of the target goal contribution for the selected fiscal period.
Comment	Description that explains the target goal contribution for the program.

Related topics

Create a guided plan to execute a program - Legacy

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Business capability form

Business Capability is a common table used within the Enterprise Architecture (formerly Application Portfolio Management) application.

Business Capability form fields

Field	Description
Name	Name of the business capability.
Parent	The parent capability for the capability that you're creating. Assigning a parent capability renders the business capability as a child capability. If no parent is assigned or if the parent is null, then the level of the capability is at 0 level or root, which means it's a root node capability. If the parent field is made null, then a message prompts you to run a scheduled job to update the business capability levels.
Level	The level at which the capability is in the hierarchy. If there's no parent capability, then the level is 0, which indicates that the capability is at the root level. Level at which the capability is in the hierarchy. Up to six levels are supported. If you add a capability or update it by changing its parent, then run the Update Business Capability Levels job, on demand. The job determines the capability level and updates all the capabilities with the level information. **Note:** The system updates the field and the user can't.
Business Unit	Business unit that is associated with the selected business capability.
Order	Assign any integer value. Applicable only for level-0 capability. The number you assign determines the position of the capability in the sequential order of all other business capabilities in that capability hierarchy. The **Order** field is available only for root node or level-0 capabilities. The scheduled job checks for conditions such as order values entered for non-root capabilities, duplicate order values, and null value and eliminates

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Field	Description
	such values. It calculates and sets the level and hierarchy ID for each capability.
Department	Department that is associated with the selected business application.
Leaf Node	This field denotes whether the business capability is a parent of any other capability. If the option is enabled, then it means that it doesn't have child capability. Capabilities follow a parent-child hierarchy. The Leaf node attribute in the capability denotes that it isn't a parent of any other capability. **Note:** The system updates the field and the user can't.
Owned by	User who owns the business capability.
Hierarchy ID	Hierarchy ID of the business capability. For level 0 capability, a hierarchy ID is generated based on the order. For all non-root capabilities, the hierarchy ID is generated based on the hierarchy ID of its parent. The number is prefixed to the business capability and you can view it in the capability hierarchy map. The capabilities are structured vertically according to their hierarchy IDs. Whenever a capability is updated such as if a parent is added or deleted, then the hierarchy ID is automatically updated. **Note:** By default, the system updates the field. So, you can't edit the field. However, if you prefer a different number or value for the hierarchy ID from what the system generates, you can reset the system property flag to **True**. Setting the property to true makes the **Hierarchy ID** field editable in the Business Capability form and you can enter the value. By this action, the system default logic of generating the hierarchy ID is overridden by your custom hierarchy ID.
Description	A short description of the business capability.

Related topics

Create business capability and relate the capability with an application - Legacy

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Business capability record form

Create a root-level capability, add a child capability to a parent, edit a capability, and delete a leaf capability, and manage the relationships between the capabilities in the capability map.

Business Capability record form fields

Field	Description
Name	Unique name for the business capability.
Description	Short description of the business capability.
Parent	If the capability is to be a root level capability or at level 0, then leave the field blank. Adding a parent renders the capability as a child and not as a root capability.

Related topics

- Manage capability hierarchy in the capability map - Legacy
- Add a business capability

Application Service Hardware Models form

Track your equipment assets such as computers and servers using hardware models.

Application Service Hardware Models form fields

Field	Description
Application Service	Name of the application service.
Ignore Technical Risk	Option to ignore the technical risk of the hardware model.
Hardware Product Model	Name of the model category.

Related topics

- Associate an application service to hardware model - Legacy

Application Service Software Model form

Business applications have multiple instances such as development, QA, and production. Instances are nothing but application services. Hence application services must be associated with software models (to the respective full versions) to know the risk of the application service.

Application Service Software Models form fields

Field	Description
Application Service	Name of the application service.
Ignore Technical Risk	Check box to ignore the technical risk of the software model.

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Field	Description
	The risk of an application service is high even if one of its underlying software models risk is high. Hence, use this check box to ignore the risk of a software model if it is insignificant and does not contribute much to the risk of the application service.
Primary Software Model	Check box to make the software model as a primary one.
Software Model	The software model that underlies the application service.
Lifecycle Full Version	The granular licensable version of the software.

Related topics

Associate an application service to a software model - Legacy

Risk Parameter form

Risk Parameter is a common table used within Enterprise Architecture (formerly Application Portfolio Management) application.

Risk Parameter form fields

Risk Parameter form

Field	Description
Name	Name of the risk parameter.
Description	A short description of the risk parameter.
Active	Enable the check box to make the risk parameter active.
Script	Create a script that calculates the risk of the software model and the risk of the business application and schedule it to run daily.

Related topics

Create a risk parameter - Legacy

TRM product form

As a member of the Enterprise Architect group, you can add a Technology Reference Model (TRM) product to the TRM library.

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TRM Product form fields

Field	Description
Publisher	Publisher of the software or hardware product. Look up and select a publisher from the Companies page.
Type	Select the type of the product. The list includes: • Software • Hardware **Note:** The fields **Is New Product**, **Software Product**, and **Hardware Product** are displayed only when you have the SAM Foundation plugin and the Hardware Asset Management plugin installed on your instance.
Is New Product	Option to specify if it's a new product.
Software Product	Name of the software product. **Note:** This field appears only when the **Type** is selected as Software and the Software Asset Management Foundation plugin is installed on your instance.
Hardware Product	Name of the hardware product. **Note:** This field appears only when the **Type** is selected as Hardware and Hardware Asset Management plugin is installed on your instance.
Operating system	The operating system on which the TRM product can be deployed. This field appears on when **Software** is selected in the **Type** field.
Name	Name of the software or hardware product. This field appears only when the **Is New Product** check box is selected.
Category	Category of the product. Look up and select a category from the TRM Categories page.
Other categories	An additional level of category classification of the TRM product. You can also filter for TRM products by using the value of this field. You can select multiple other category values.
TRM Phase	Phase of the product. Use the following list:

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Field	Description
	• Approved • Approved with Constraints • Divest • Evaluation • Unapproved
Investment direction	Purpose for the investment. Use the following list: • Divest • Eliminated • Invest • Maintain
Business Justification	Business justification for the product request.

Related topics

- Add a TRM product - Legacy
- Add a TRM product in Enterprise Architecture Workspace

Request TRM product form

The Request TRM product form is used for adding or editing a request to include a new software or hardware product to the Technology Reference Model (TRM) library.

Request TRM product form fields

Field	Description
Number	A unique, auto-generated identification number for the product request.
Publisher	Publisher of the software or hardware product. Look up and select a publisher from the Companies page.
Type	Select the type of the product. The list includes: • Software • Hardware **Note:** The fields **Is New Product**, **Software Product**, and **Hardware Product** will be displayed only when you have the Software Asset Management Foundation plugin and the Hardware Asset Management plugin installed on your instance.

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Field	Description
Is New Product	Option to specify if it's a new product.
Software Product	Name of the software product. This field appears only when the **Type** is selected as Software and Software Asset Management Foundation plugin is installed in your instance.
Hardware Product	Name of the software product. This field appears only when the Hardware Asset Management plugin is installed in your instance.
Operating system	The operating system on which the TRM product can be deployed. This field appears on when **Software** is selected in the **Type** field.
Name	Name of the software or hardware product. This field appears only when the **Is New Product** check box is selected.
Short Description	Description about the product request.
Approval	Status of the approval. Choices include: • Not yet requested • Requested • Approved • Rejected
Requested TRM Phase	Phase of the product. Look up and select a phase from the TRM Phases page.
Category	Category of the product. Look up and select a category from the TRM Categories page.
Other categories	An 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.
Business Justification	Business justification for the product request.

Related topics

Add or edit a TRM product request - Legacy

View and edit your product requests - Legacy

TRM Product Request using catalog form

The TRM Product Request using catalog form is used to add or edit a request for including a new software or hardware product to the Technology Reference Model (TRM) library.

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TRM Product Request form fields

Field	Description
Publisher	Publisher of the software product. Look up and select a publisher from the Companies page.
Category	Category of the product. Look up and select a category from the TRM Categories page.
Type	Select the type of the product. The list includes: • Software • Hardware **Note:** The fields **Is New Product**, **Software Product**, and **Hardware Product** are displayed only when you have the Software Asset Management Foundation plugin and the Hardware Asset Management plugin installed on your instance.
Is New Product	Option to specify if it's a new product.
Software Product	Name of the software product. This field appears only when the **Type** is selected as **Software**, and when the Software Asset Management Foundation plugin is installed on your instance.
Hardware Product	Name of the hardware product. This field appears only when the **Type** is selected as **Hardware**, and when the Hardware Asset Management plugin is installed on your instance.
Name	Name of the software or hardware product. This field appears only when the **Is New Product** check box is selected.
Requested TRM Phase	Phase of the product. Look up and select a phase from the TRM Phases page.
Short Description	Description about the product request.
Business Justification	Business justification for the product request.

Related topics

TRM Product Request using catalog form

TRM Product Lifecycle Request form

The TRM Product Lifecycle Request form is used for adding or editing a request to create a lifecycle for a Technology Reference Model (TRM) product.

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TRM Product Lifecycle Request form fields

Field	Description
Number	A unique, auto-generated identification number for the product request.
Publisher	Publisher of the software or hardware product. Look up and select a publisher from the Companies page.
TRM Product	Name of the TRM product. Look up and select the product from the TRM Products page.
Version	Version of the TRM software product. This field appears only when a software product is selected in the **TRM Product** field.
Edition	Edition of the TRM software product. Either Standard or Enterprise. This field appears only when a TRM product of type software is selected in the **TRM Product** field.
Hardware model	Select the hardware model from the list of available hardware models. This field appears only when a TRM product of type hardware is selected in the **TRM Product** field.
Model number	Hardware model number. This field is auto-populated with a model number, when a hardware model is selected. This field appears only when a TRM product of type hardware is selected in the **TRM Product** field.
Requested TRM Phase	Phase of the product. Look up and select a phase from the TRM Phases page.
Phase start date	Start date of the product lifecycle phase.
Phase end date	End date for the product lifecycle phase.
Barcode	Barcode of the hardware model. This field is auto-populated with the barcode number, when a hardware model is selected. This field appears only when a TRM product of type hardware is selected in the **TRM Product** field.
Business Application	Select the business application that uses or depends on this TRM product. This reference associates the product lifecycle with a business application to support technology impact, risk, and lifecycle analysis.
Short Description	Description about the product lifecycle request.
Business Justification	Business justification for the product lifecycle request.

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Related topics

- Request a TRM product lifecycle using the TRM Catalog - Legacy
- Add or edit a TRM product lifecycle request - Legacy
- View and edit your product lifecycle requests - Legacy

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

- Add or edit a TRM category - Legacy
- Manage TRM categories
- Add or edit a TRM category

TRM Phase form

Define your own TRM phase or edit an existing TRM phase.

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.

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Related topics

- Add or edit a TRM phase - Legacy
- Add or edit a TRM phase

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

- Create a data domain - Legacy
- Add or edit a data domain from the Portfolio page
- Add or edit an information data domain

Information Objects form

An information object captures the logical data for the business application.

Information Objects form fields

Field	Description
Select classification tag	Drop-down list to show the classification groups and classification that can be applied to the information object.
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.

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Field	Description
Department	Department in the business unit that actually owns the information.
Description	Short description of the information object.
Data domain	Reference to the Data Domain table that holds the categorized conceptual data. The relationship between the conceptual and the logical data layers is established by referencing the data domain in the Information Object table.

Related topics

- Apply classification tags to an information object - Legacy
- Create an information object referencing a data domain - Legacy

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, which are properties that define the extent of the relationship between the business application CI and the information object CI.

Related topics

- Relate a business application to an information object - Legacy

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Status of the Software models

An application owner can run the software model suggestions engine to fetch software models. These models can be related to an application service instead of mapping them manually. Every application service displays the status after they are mapped.

Status of the Software models

First run of the job	Second run of the job	Conditions of association	New status of the software model
Found	Found	Yes	**Associated**: Associates the selected software model to the application service. The status is prefixed with a green bubble. In the subsequent run of the job, these software models are still in Associated state. You may choose to dissociate the software model if it has been removed or uninstalled from the hardware on which the application service runs.
Found	Found	No	**Ignored**: If no action is taken on the software models in the prior run of the job, then they are identified as **Ignored** (prefixed with a gray bubble) in the current run of the status.
Not found	Found	Not applicable	**New**: The software models that are identified in the first run of the job, and those software models that have been added after the last run but before the current run are marked with status **New** prefixed with a yellow bubble. You can associate or dissociate such software models.

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First run of the job	Second run of the job	Conditions of association	New status of the software model
Found	Not found	Yes	**Delete**: You can delete a software model that is in Associated, Ignored, or New status. This action deletes the software model from the list of the retrieved software models, which is Retrieved Software Models [sn_apm_service_software_model_sug table but not from the Application Service Software Model [sn_apm_tpm_service_software_model table.
Found	Not found	No	Delete

Related topics

Associate suggested technology models to an application service - Legacy

Date conditions

A maintenance user can configure Date range for the lifecycle phases.

Date conditions

Date conditions

Date conditions	Timeline in TPM screen
Current date, Current date –10 years, Current date + 3 years.	Default dates. Timelines of product models that fulfill the default date conditions are shown.
All phases that start before the current date – 10 years and continues to the present time.	Product models with such date conditions are shown and the timeline expands itself automatically from the default (–10 years to +3 years) to accommodate the past years.
Phases that start before the current date –10 years and continue beyond the current date and may still be in progress	Product models with such phases are shown until current date + 3 years.
Lifecycle phases that start and end before the current date –10 years	Product models with such phases are NOT shown.

Lifecycle phase of record	Conditions for plotting the dates on TPM timeline
One internal and one publisher	All dates are plotted on the timeline.
Multiple publishers	Only one publisher date is plotted.

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Lifecycle phase of record	Conditions for plotting the dates on TPM timeline
	The publisher that is selected for plotting depends on the *sequence* property in the source column. All sources have a sequence number attached to them. The source with the least sequence number is selected. If the source with the least sequence number does not have any lifecycle records, then the source with the next least sequence number is selected.
One internal and multiple publishers	The internal date is plotted, but only one publisher date is plotted. The publisher record that is selected for plotting depends on the *sequence* property.
Overlapping dates of two phases	Only one line is shown.
Gaps in dates	A continuous line with no gap in the timeline.

Related topics

Product lifecycle data on the timeline - Legacy

Quick start tests for Enterprise Architecture (formerly Application Portfolio Management)

Validate that Enterprise Architecture still works after you make any configuration changes, such as applying an upgrade or developing an application. Copy, customize, and pass these quick start tests when using your instance-specific data.

Enterprise Architecture quick start tests require enabling the Enterprise Architecture – ATF Tests plugin (com.snc.apm.atf).

Enterprise Architecture: Create Business application and capability test suite

Test	Description	Release version
Enterprise Architecture: Create Business Application	Verify the creation of an application category and then the creation of a business application with users having apm_user role.	Madrid
Enterprise Architecture: Create Business Capability	Verify the creation of a parent and child business capability and verify its field values.	Madrid
Enterprise Architecture: Test relating Business Service, Business Application, and Software Models	Verify the creation of a business application, business service, using the existing software model, and a relationship between them.	Orlando
Enterprise Architecture: Test for Indicator Score and Application Score generation	Verify the creation of indicator, scoring profile, and generation of indicator scores and application scores.	Paris

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Enterprise Architecture: Create Business application and capability test suite (continued)

Test	Description	Release version
Enterprise Architecture: Business Application with Information Object and Data Domain	Verify the creation of business application, information object, and addition of the CRUD operations in relation attributes.	Quebec

Enterprise Architecture (formerly APM) TRM: Test relating TRM product and product life-cycle request test suite

Test	Description	Release version
Enterprise Architecture: Creating and Approving Product and Product Lifecycle Request	Create and approve product TRM requests and product lifecycle requests.	Utah

Related topics

Quick start tests

Enterprise Architecture (formerly APM) Cloud Assessment Scoring Profile

The Cloud Assessment scoring profile in Enterprise Architecture helps you to evaluate a business application for its cloud migration readiness.

Indicator for Enterprise Architecture Cloud Assessment Scoring Profile

Indicator name	Frequency	Type	Source	How is it calculated	Description
Strategic Importance	Year	Custom Script	Enterprise Architecture product. cmdb_ci_business_app table	Calculated from the **Emergency tier** (emergency_tier) field of the business application record.	Evaluates the emergency tier of the business application.
Data Classification	Year	Custom Script	Enterprise Architecture product. cmdb_ci_business_app table	Calculated from the **Data classification** (data_classification) field of the business application record.	Evaluates data classification of the business application.
Cloud Version Available	Year	Custom Script	Enterprise Architecture product.	Calculated from the **Cloud version available**	Evaluates if there is an available version of this

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Indicator name	Frequency	Type	Source	How is it calculated	Description
			cmdb_ci_business_app table	(cloud_version_available) field of the business application record.	application that fits cloud deployment.
Core Architecture	Year	Custom Script	Enterprise Architecture product. cmdb_ci_business_app table	Calculated from the **Core architecture** (core_architecture) field of the business application record.	Evaluates if this business application is part of the core architecture.
Business Criticality	Year	Custom Script	Enterprise Architecture product. cmdb_ci_business_app table	Calculated from the **Business criticality** (business_criticality) field of the business application record.	Evaluates the business criticality of the business application.
Regulatory Implications	Year	Custom Script	Enterprise Architecture product. cmdb_ci_business_app table	Calculated from the **Regulatory implications** (regulatory_implications) field of the business application record.	Evaluates the regulatory implications of the business application.
Business Impact	Year	Indicators	Not applicable	Calculated from the sum of the following indicators: • **Core architecture** (core_architecture) • **Strategic importance** (emergency_tier) • **Business criticality** (business_criticality)	Evaluates the business impact score for the business application, based on other indicators.
Cloud Readiness	Year	Indicators	Not applicable	Calculated from the sum of the	Evaluates the cloud readiness score for the

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Indicator name	Frequency	Type	Source	How is it calculated	Description
				following indicators: • **Data classification** (data_classification) • **Cloud version available** (cloud_version_available) • **Complexity of integration** (integration_complexity) • **Regulatory implications** (regulatory_implications)	business application based on other indicators.
Complexity of Integration	Year	Custom Script	Enterprise Architecture product. cmdb_ci_business_app table	Calculated from the **Integration complexity** (integration_complexity) field of the business application record.	Evaluates the complexity of integration to the business application.
User Base	Year	Custom Script	Enterprise Architecture product. cmdb_ci_business_app table	Calculated from the **User base** (user_base) field of the business application record.	Evaluates the user base of the business application.
Cloud Readiness Assessment	Year	Assessments	Enterprise Architecture product. cmdb_ci_business_app table	Calculated from the **Assessment instances** of the business application record.	Evaluates the cloud readiness assessment score (based on a survey).

Related topics

Enterprise Architecture Cloud Assessment - Legacy

Create a digital interface form

Create a digital interface for an integration in Enterprise Architecture (formerly Application Portfolio Management).

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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. **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.
Interface Type	Type of API used by the interface. It 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.

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Field	Description
	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. As 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: • 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,

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Field	Description
	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.

Owners section 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 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.

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Functional section fields (continued)

Field	Description
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 fields

Field	Description
Authentication Type	Type of authentication used to authenticate the interface. Use the following options: • Basic Auth • OpenID Connect • Certificate • 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 fields

Field	Description
Work notes	Comments about the interface.

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Create or update a digital interface

Digital interface to API form in Enterprise Architecture (formerly APM)

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	(Optional) Name of the CMDB API. Select an API that you want to associate to 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 of the connection between the digital interface and the API.

Related topics

Connect a digital interface with CMDB API in Enterprise Architecture - Legacy

Management of digital integrations

You can manage all the integrations and interfaces at a centralized space.

Important:

Starting with the Xanadu release, the legacy digital integrations module is moved to the Enterprise Architecture Workspace. To learn more, see Exploring digital integrations in Enterprise Architecture Workspace.

The digital integration functionality in Enterprise Architecture (formerly Application Portfolio Management) 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 find out the issues of the integrations at one place.
- Manage the information flows across your organization.
- Have complete governance over the use of interfaces for internal and external APIs.

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Digital interfaces in Enterprise Architecture (formerly Application Portfolio Management)

Manage digital interfaces in Enterprise Architecture.

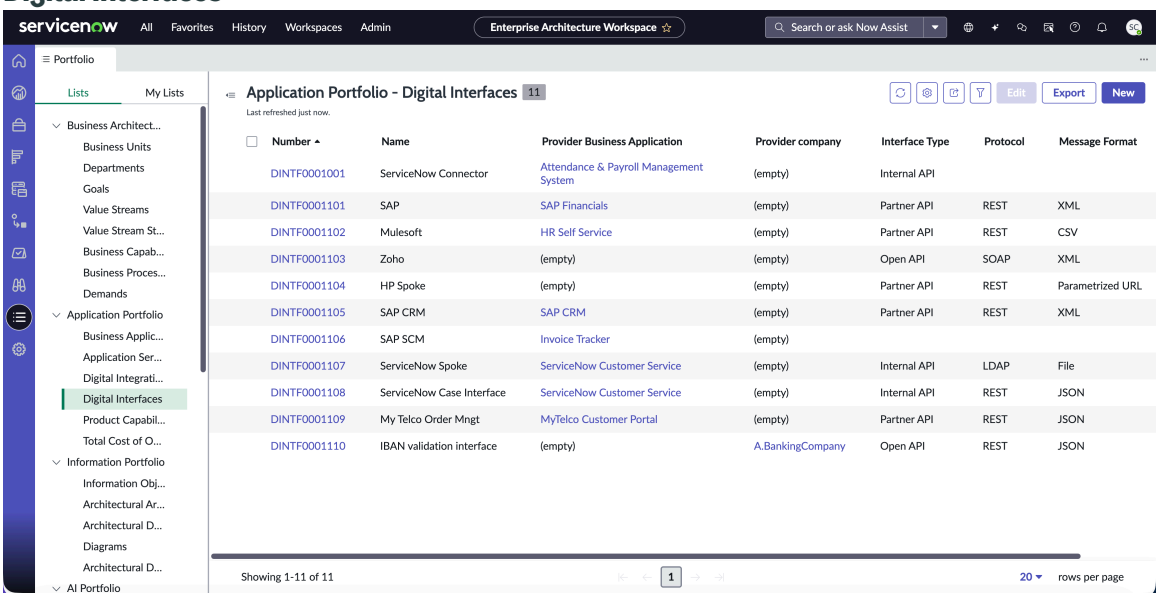
Important:

Starting with the Xanadu release, the legacy digital interfaces module is moved to the Enterprise Architecture Workspace. To learn more, see Exploring digital interfaces in Enterprise Architecture Workspace.

Digital interfaces represent the logical contracts through which a business application or application service exposes functionality or data 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.

Digital Interfaces



Create or update a digital interface

Create a digital interface for an integration in Enterprise Architecture (formerly Application Portfolio Management) 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.

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Procedure

1. Navigate to **All** > **Enterprise Architecture** > **Application Portfolio** > **Digital Interfaces**.
2. Create or update a digital interface.
   a. To create a digital interface, select **New**
   b. To update an existing digital interface, select a digital interface number link to open it.
3. On the form, fill in the fields.
   For field information, see Create a digital interface form.
4. Select **Submit**.

Delete a digital interface

Delete a digital interface that you no longer need.

Before you begin

Role required: sn_apm.apm_analyst

Procedure

1. Navigate to **All** > **Enterprise Architecture** > **Application Portfolio** > **Digital Interfaces**.
2. Open a digital interface number by clicking it.

   Note: You cannot delete a digital interface if it has any digital integration associated with it.

3. Click **Delete**.
4. Confirm the deletion.

Digital integrations

Manage digital integrations in Enterprise Architecture (formerly Application Portfolio Management).

Important:

Starting with the Xanadu release, the legacy digital integrations module is moved to the Enterprise Architecture Workspace. To learn more, see Exploring digital integrations in Enterprise Architecture Workspace.

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.

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

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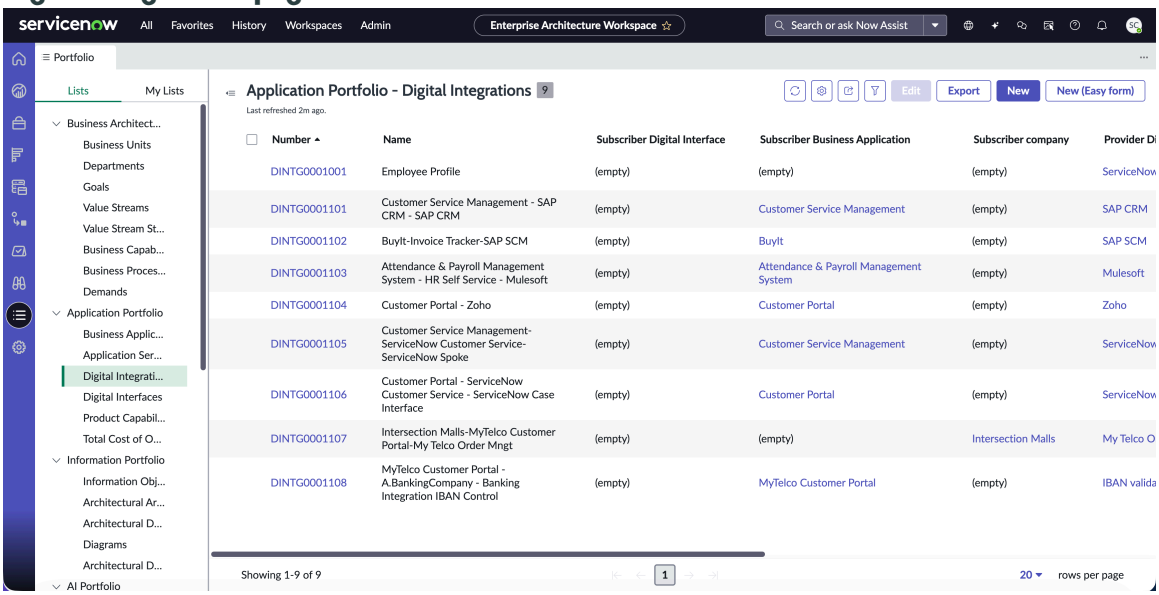
The Digital Integrations page displays a list of existing digital integrations and their related information. You can access the Digital Integrations page by navigating to **All** > **Enterprise Architecture** > **Application Portfolio** > **Digital Integrations**.

Digital Integrations page



Related topics

View all digital integrations

Add or edit a digital integration in the EA Workspace

Create a digital integration

Create a digital integration in Enterprise Architecture (formerly Application Portfolio Management), to create a connection between a consuming business application and a provider business application.

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.

You can define why a connection is required between two data entities, over which Interfaces they should communicate, and provides a link to relevant design and architectural material. A Digital Integration underpins a business capability and provides business value.

Before you begin

Important:

Starting with the Xanadu release, the legacy digital integrations module is moved to the Enterprise Architecture Workspace. To learn more, see Add or edit a digital integration in the EA Workspace.

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.

Role required: sn_apm.apm_analyst

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Procedure

1. Navigate to **All** > **Enterprise Architecture** > **Application Portfolio** > **Digital Integrations**.
2. Select **New**
3. On the Create Digital Integration form, fill in the fields.
   For a description of the field values, see Create digital integration form.
4. Select **Submit**.

Result

On the Digital Integrations page, a success message and the link to the newly created digital integration appear.

After submission of the form, within the CMDB platform, a CI relationship (Interfaces::Interfaced By) gets created between provider and subscriber business applications. In a case, where 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.

Update a digital integration

Update the details of an existing digital integration in Enterprise Architecture (formerly Application Portfolio Management).

Before you begin

Important:

Starting with the Xanadu release, the legacy digital integrations module is moved to the Enterprise Architecture Workspace. To learn more, see Add or edit a digital integration in the EA Workspace.

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.

Role required: sn_apm.apm_user

Procedure

1. Navigate to **All** > **Enterprise Architecture** > **Application Portfolio** > **Digital Integrations**.
2. Open a digital integration number by selecting it.
3. On the Digital Integration form, fill in the fields.
   For a description of field values, see Update digital integration form.
4. Select **Update**.

Delete a digital integration

Delete a digital integration that you no longer require.

Before you begin

Role required: sn_apm.apm_user

Procedure

1. Navigate to **All** > **Enterprise Architecture** > **Application Portfolio** > **Digital Integrations**.
2. Select and open the digital integration to be deleted.

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3. Click **Delete**.
   A confirmation message appears.

Use Business Application Lifecycle Management to request a digital integration

Submit a request using the Application Lifecycle Management module to request a digital integration in Enterprise Architecture (formerly Application Portfolio Management).

Before you begin

Role required: sn_apm.apm_user

Procedure

1. Navigate to **All** > **Enterprise Architecture** > **Business Application Lifecycle Management** > **Business Application Catalog**.

   The Business Application Lifecycle Management Services opens in a service catalog page.

2. Register a new digital integration by selecting the **Request a Digital Integration** card or selecting **View Details** in the Request Digital Integration card.
3. On the Request a Digital Integration form, fill in the fields.
   For a description of the field values, see Request digital integration form.
4. Select **Submit**.

Result

The system validates your request to check if a digital integration with the same name exists. If yes, then an error message is displayed. If no, then a flow is triggered and a request to register a digital integration is created.

After your request is approved, the requested digital integration is created as a record in the digital integrations table.

Use Business Application Lifecycle Management to retire a digital integration

Retire a digital integration that you no longer need. Submit a request using the Application Lifecycle Management module to retire a digital integration in Enterprise Architecture (formerly Application Portfolio Management).

Before you begin

Role required: sn_apm.apm_user, sn_apm.apm_analyst

About this task

Based on your role, you can either directly retire a digital integration, or you can request that an approver retires the digital integration. Retiring a digital integration occurs in the following conditions:

Conditions for retiring a digital integration

Role	Action allowed
Enterprise Architecture user, IT owner, Business owner, or Supporter of the digital integration	Can request to retire a digital integration. The analyst then approves or rejects the request.
APM analyst	Can retire a digital integration. You can approve or reject the requests for retiring a digital integration.

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Procedure

1. Navigate to **All** > **Enterprise Architecture** > **Business Application Lifecycle Management** > **Business Application Catalog**.

   Business Application Lifecycle Management Services opens in a service catalog page.
2. Retire a digital integration by clicking the **Retire a Digital Integration** card or by clicking **View Details** in the Retire Digital Integration card.
3. From the list of values in the Retire Digital Integration form, select the name of the digital integration.
4. Click **Submit**.

Approve or reject a digital integration request

As an Enterprise Architect user, approve or reject a digital integration request submitted by Enterprise Architecture (formerly APM) users.

Before you begin

The user must be part of the Enterprise Architect Group.

Role required: sn_apm.apm_analyst

Procedure

1. Navigate to **All** > **Service Desk** > **My Approvals**.
2. Select the digital integration request that you want approve or reject.
3. Select **Approve** or **Reject**.

Enterprise Architecture Workspace

The Enterprise Architecture Workspace (EA Workspace) is part of the Enterprise Architecture application. It provides an interactive user interface to enable enterprise architects to stay up to date with their tasks, get insights, and monitor the health of the portfolio from a single location.

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

Enterprise Architecture Workspace Overview

Configuring Enterprise Architecture Workspace

Managing Enterprise Architecture Workspace

Integrating Enterprise Architecture Workspace with other applications

Enterprise Architecture Workspace Overview

The Enterprise Architecture Workspace has a consolidated user interface and is designed for different user roles.

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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.

Designed for different user roles

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

Home page with different 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, assigned to any group you belong to, assigned to any group you manage, or 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.
  - 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**: Helps you to monitor your portfolio and its health. You can also use the filter option to filter for and 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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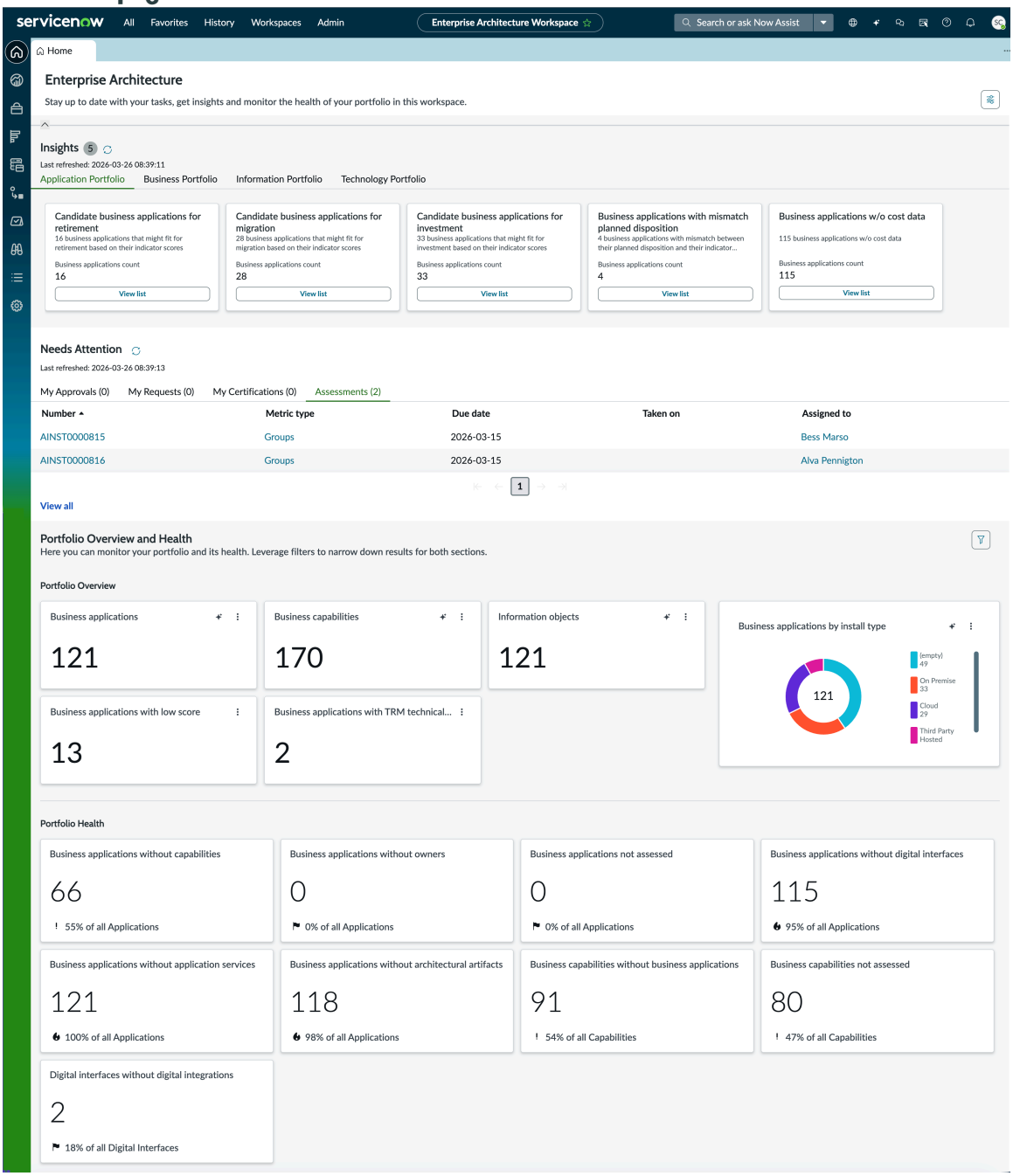
Overview page



Note: 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

- 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 TPM and TRM lifecycle timelines

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Rationalization of business applications

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

Manage the Technology Portfolio Management (TPM) in 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 are upgrading to Zurich, 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 are 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

Enterprise Architecture Workspace users with Business stakeholder role for Enterprise Architecture Workspace (sn_apm.apm_read) role have only view access to all the pages and they can't create or update any data in the Enterprise Architecture Workspace.

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

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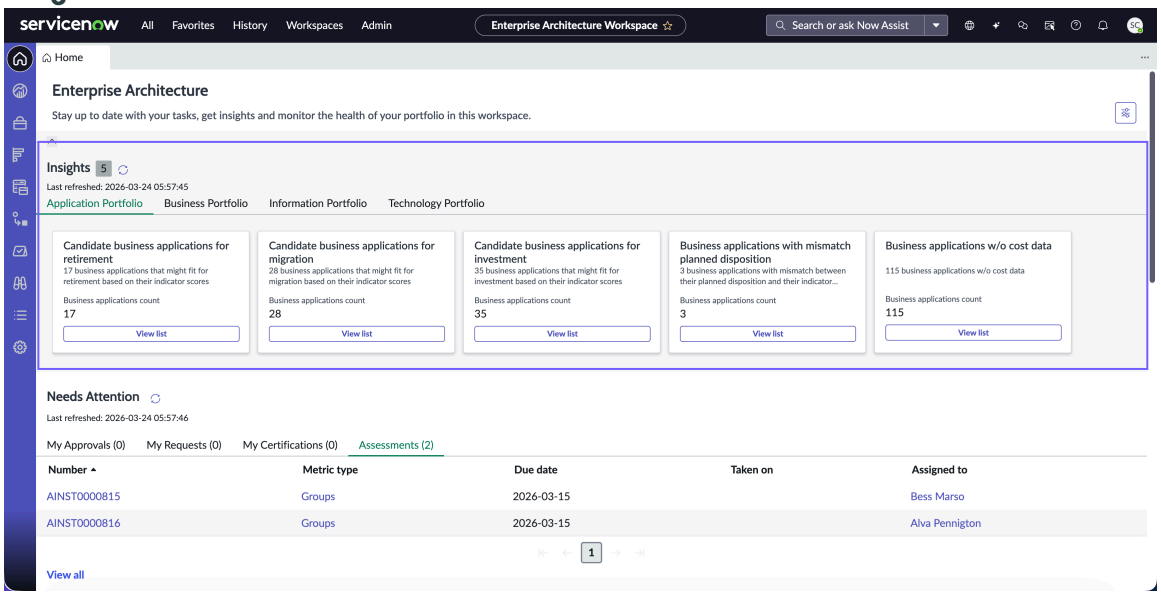
The last refreshed time shows when the results were refreshed in your browser. You can manually refresh the results by using the refresh icon ( ). You can navigate to the full list by selecting the **View list** button. You can see the details of a record by selecting it.

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

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

Technology Portfolio

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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
End of life date	The end of life date for the software product or hardware model

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Technology lifecycle risks (continued)

Field	Description
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 data in the My certifications table is fetched 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, you may see that your certification data is still fetched from the Certification Schedules (cert_schedule) table. In this case, you must migrate your certification policies to the CMDB Data Management Certification Policies (sn_cmdb_ws_dm_certification_policy) table. For more information, see Import certification schedules in to Data Managerand Publish a draft Data Manager policy.

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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, 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 whenever an exact lifecycle version match or no valid lifecycle version could be found against the software product or hardware model version used 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 including end of support date, end of extended support date, and end of life date for your software products and hardware models by querying the ITAM content library. For more details, see Schedule a job to generate TPM lifecycle data - Legacy and Run a scheduled job to generate TPM lifecycle data - Legacy. 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 application or 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 Manage TRM technical debt and Run a scheduled job to update TRM technical debt data in EA Workspace.

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

View the performance of applications using the 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, information portfolio, and so on.

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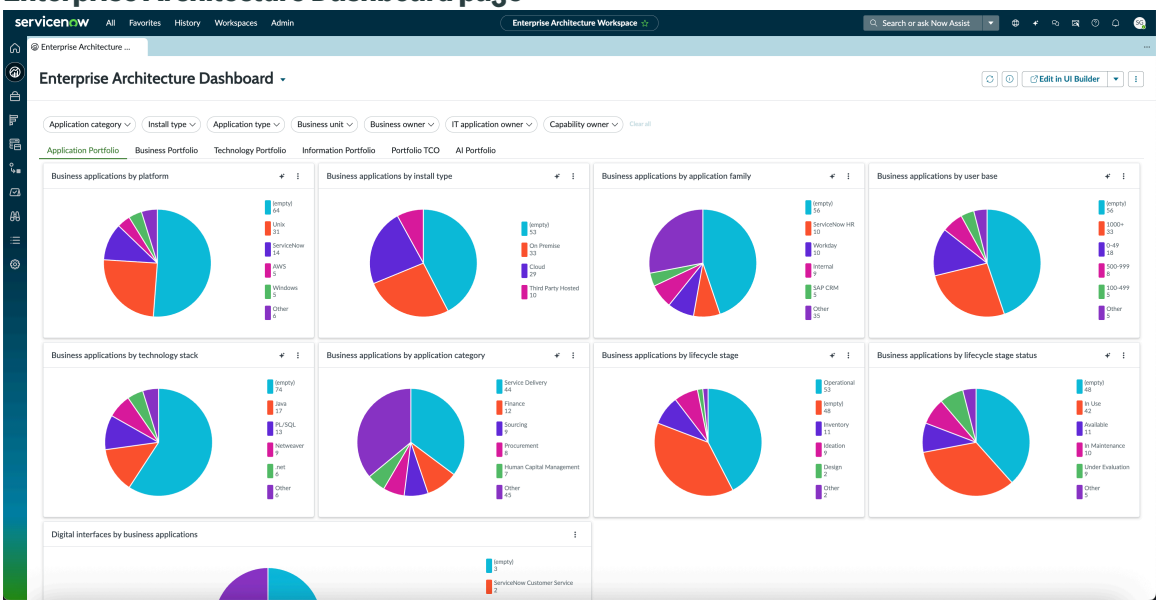
particular page and see the list of records under that category. To hide or show a slice in the pie chart, select its colored legend. Use the **Refresh** button to refresh the results of a pie chart.

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 dashboard	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
Application Portfolio	Business applications by technology stack	Pie chart

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Tab name	Visualization title	Visualization type
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 **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 (Current quarter)	Summary

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Tab name	Visualization title	Visualization type
	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.
	Business application TCO by cost type and planned disposition for FY:Q (Current quarter)	Heat map
	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	Pie chart
	AI Systems by Business Application Association	Pie chart

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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.

Note:

- 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 will be 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 duration of a 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

AI Control Tower integration with Enterprise Architecture

Exploring the AI Portfolio

Exploring the AI Portfolio tab on the Enterprise Architecture Workspace dashboard

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.

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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 the performance of applications using the 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.

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

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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.
- Business Applications by Install Type

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

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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

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.

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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.

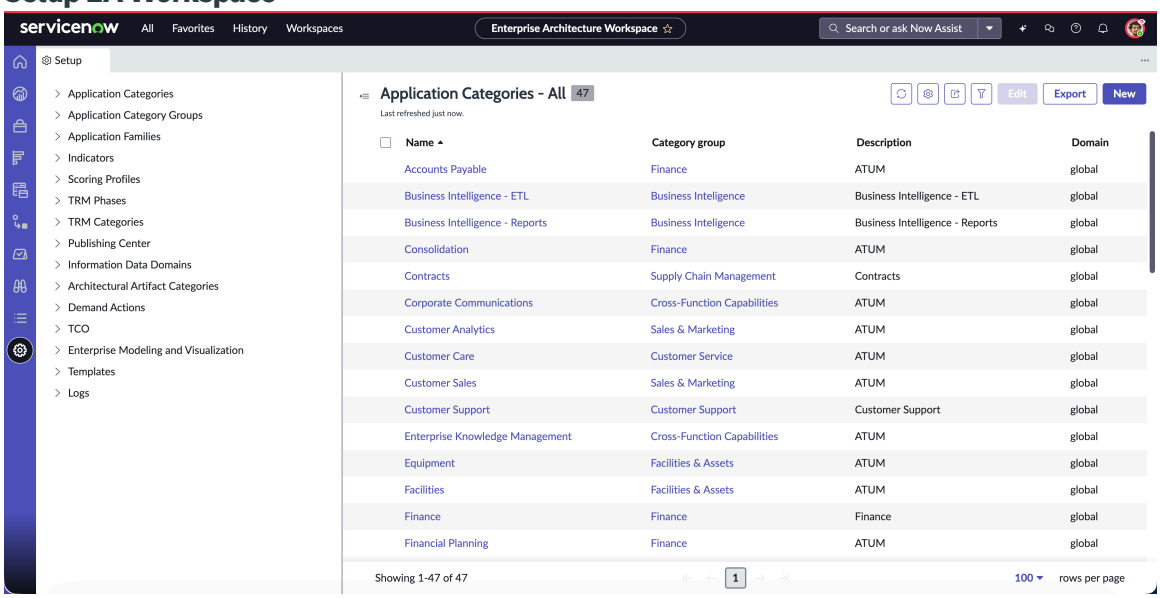
Architectural Artifact Categories

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.

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.

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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, and 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
- 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

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.

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Related topics

- View all scoring profiles
- Add or edit a scoring profile
- Regenerate scoring profile indicator scores on-demand 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.

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

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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
- 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 and fetched from the CMDB Data Management Task (cmdb_data_management_task) table.

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

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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.
- 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.

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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. Similarly, on expanding a parent capability, you can see the number of subcapabilities and the total count of business applications that are directly related to the subcapability at that level.

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

Gantt view of TPM and TRM lifecycle timelines

A Gantt chart in the Enterprise Architecture Workspace is a visual representation of the Technology Portfolio Management (TPM) and Technology Reference Model (TRM) timelines of business applications, and their associated application services like software products and hardware models.

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.

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

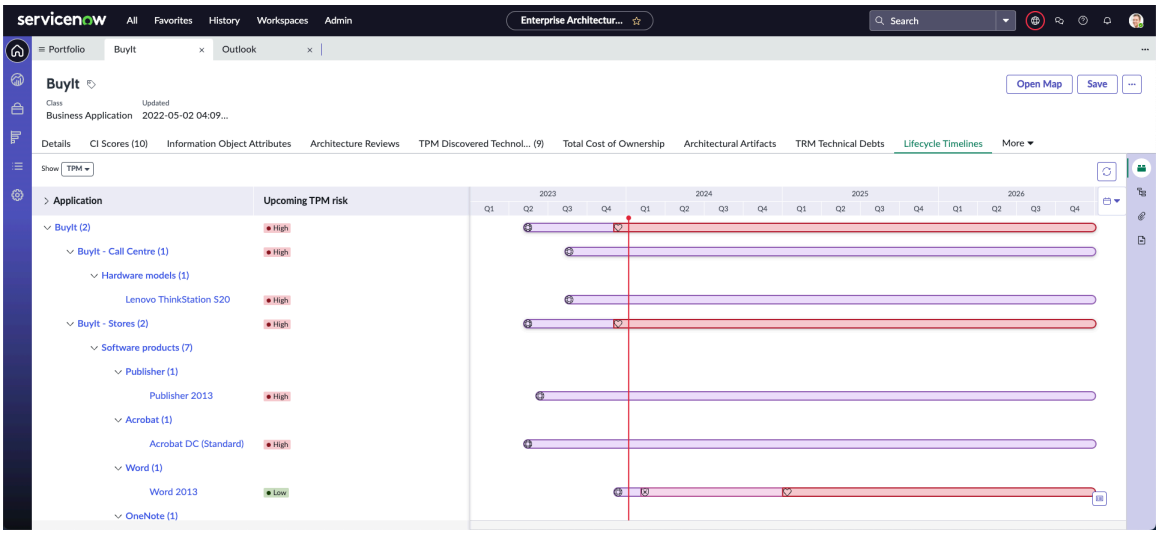
Related topics

Working with Gantt chart views in EA Workspace

TPM lifecycle timelines on Gantt chart

For Technology Portfolio Management (TPM), 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.

TPM 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 TPM 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. For each software product having a unique combination of product name, product version, and product edition, their lifecycle record is created and the timelines are displayed on the Gantt chart.

Lifecycle end-date calculation logic

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

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- 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 TPM 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.

If only one TPM phase is available for a TPM product, then the TPM 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 TPM phase start date of either the software products and hardware models are rolled up to calculate the TPM phase start date of the overall application service. That is, the earliest TPM phase start date of any software product or hardware model is taken as the TPM phase start date of the application service, overall.

For example, let's assume that all hardware models and software products have lifecycle dates for the TPM phases that are end of support, end of extended support, and end of life. Now, 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. In this scenario, the end of support start date of the software product that is 12/01/2023 will be considered as the TPM phase start date of that application service and accordingly the Gantt chart bar for that application service will start from 12/01/2023.

Similarly, the TPM phase start date of the business application is considered as the earliest TPM 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 that is 12/01/2023 will be considered as the TPM phase start date of the business application and the Gantt chart bar for that business application will start from 12/01/2023.

TPM risk calculation

The TPM view also displays the upcoming TPM 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 - Legacy. To learn more about technology lifecycle risk, see Technology risk calculation - Legacy.

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,

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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.

Color coding

The colors of the bars on the Gantt chart are based on their TPM phase. The TPM 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 TPM risk type in the Upcoming TPM 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 TPM 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 '*'.

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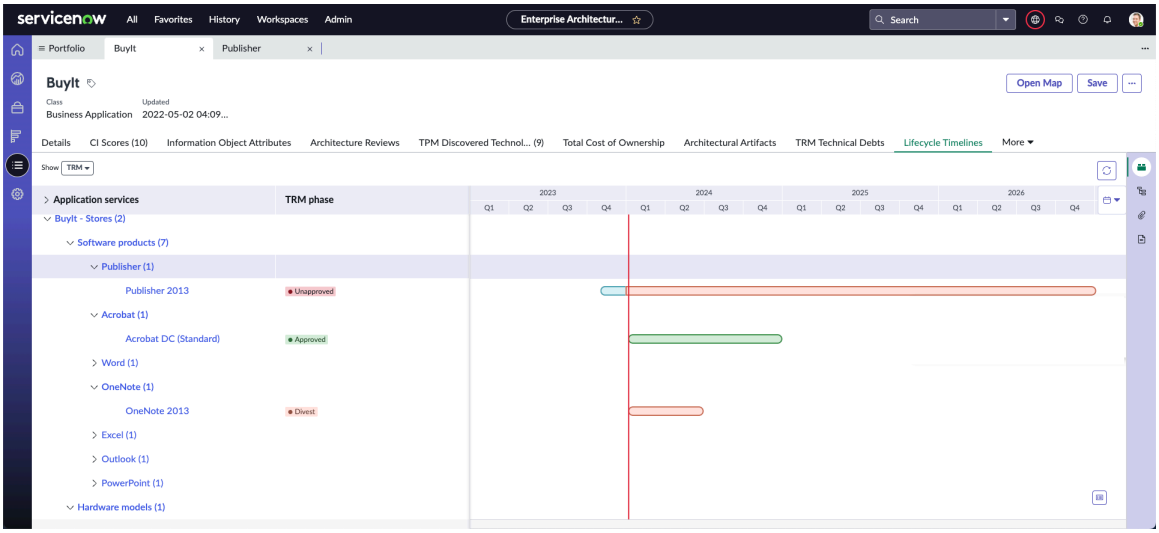
TRM Gantt chart view



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**.

Also, if a TRM product phase doesn't have the **Production approved** check box (**Enterprise Architecture Workspace** > **Setup** > **TRM Phases**) selected, then the TRM phase column displays the status of the application service having that TRM phase as **Unapproved**. For details on how to approve a TRM phase, see Add or edit a TRM phase - Legacy.

Only when the TRM phase is marked as production approved and the phase start date has already passed, the TRM phase for the application service is displayed in the TRM phase column. 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 Manage Technology Reference Model (TRM) technical debt - Legacy.

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 Run a scheduled job to update TRM technical debt data in EA Workspace.

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Lifecycle end-date calculation logic

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

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.

  Or the TRM product **Name**, **Version**, and **Edition** values for that particular software product as defined in the TPM Technology Lifecycle table (sn_apm_tpm_technology_lifecycle) should match the **TRM Product**,**Version**, and **Edition** values that are entered while 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 that is entered while creating the TRM lifecycle for that application service.

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

For details on how to create a TRM product lifecycle request, see Add a TRM product lifecycle.

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

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 - Legacy.

Related topics

View TPM and TRM lifecycle timelines on the Gantt chart

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Rationalization of business applications

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

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.

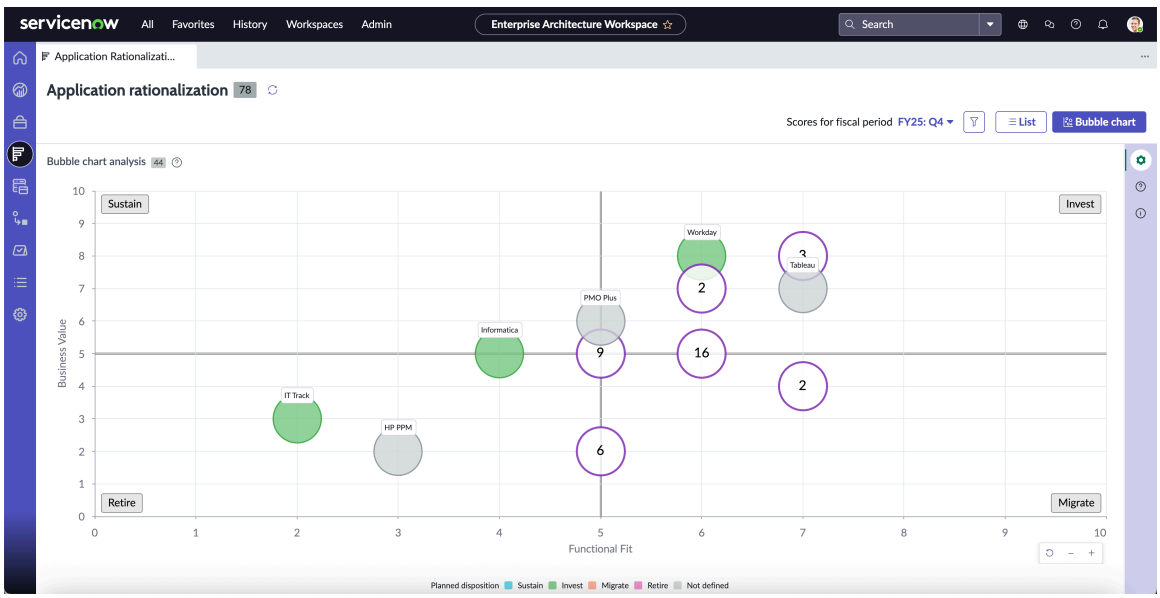
You can perform the following using application rationalization:

- 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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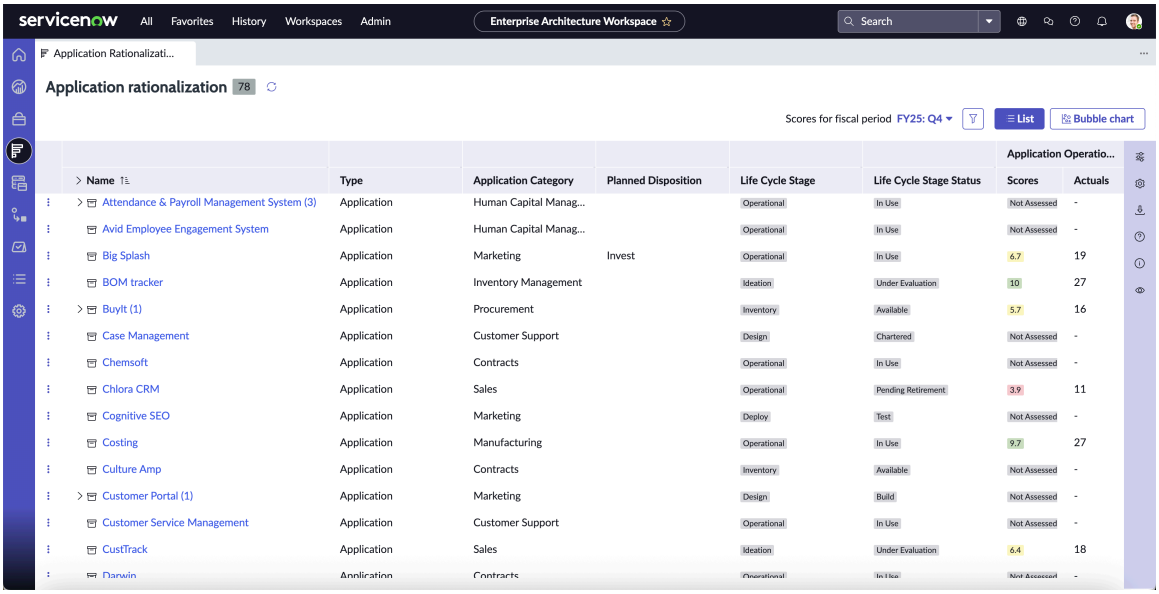
List view



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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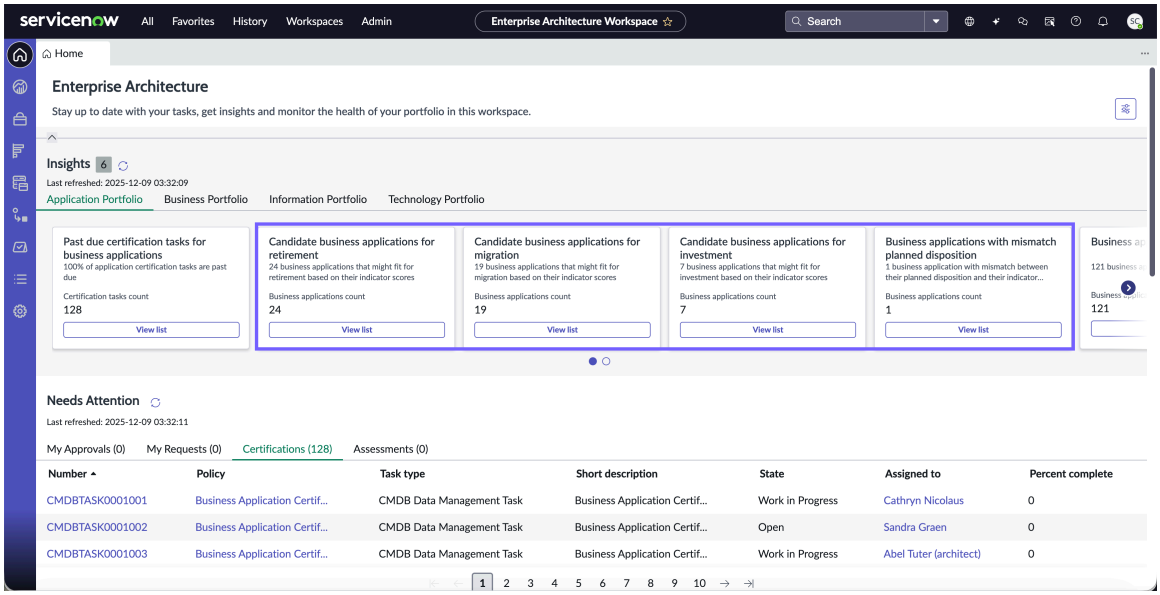
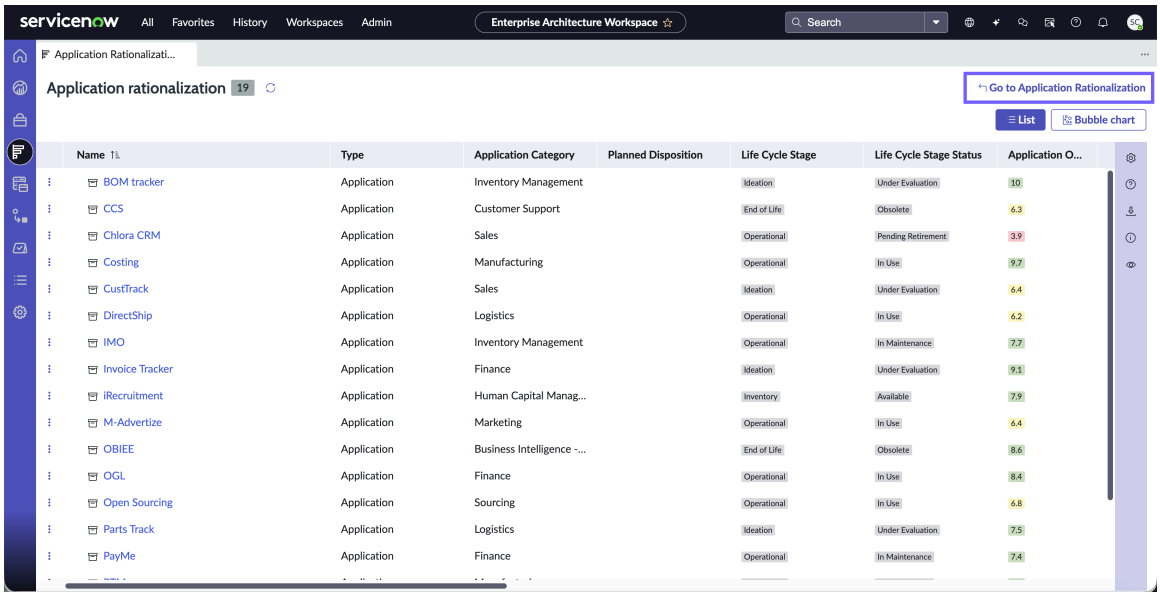


On selecting a particular card, the Application Rationalization page appears to display the relevant business application data, based on your selection.

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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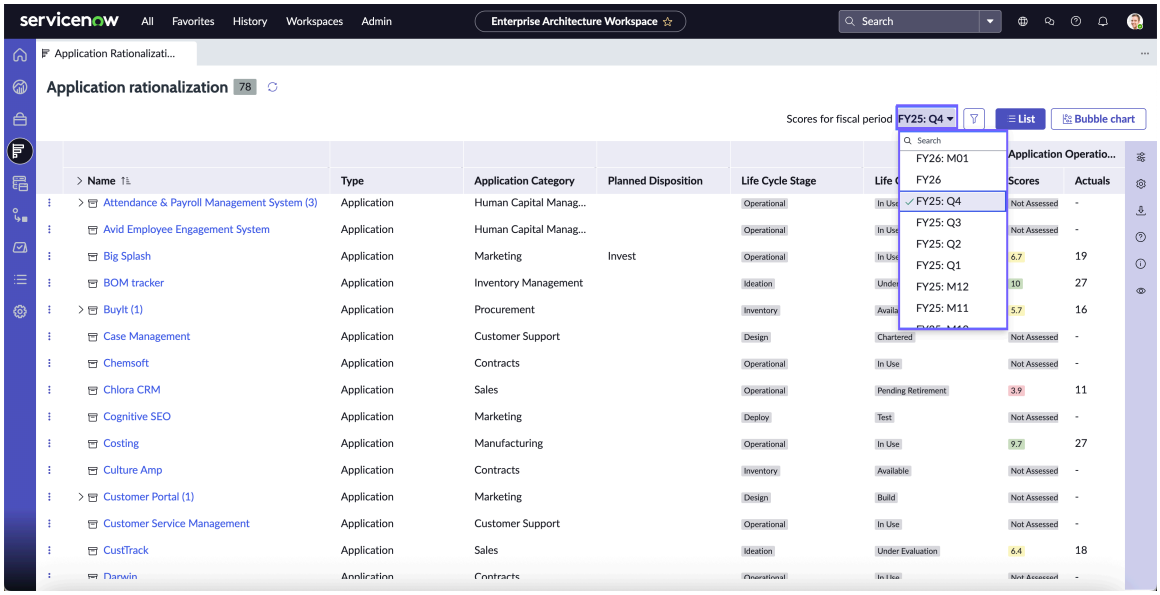


The latest fiscal period is derived from the apm_app_indicator_score list. The fiscal period type (month, quarter, or year) is derived from the system property *com.glide.fiscal_calendar.fiscal_unit*.

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

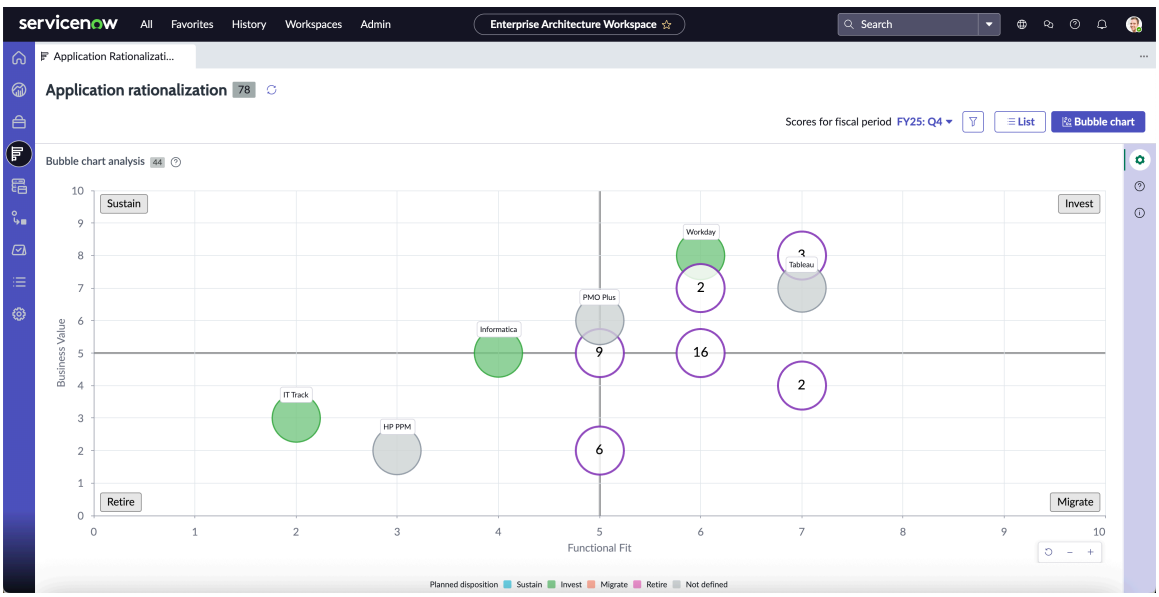
Working with application rationalization

Generate insights into business applications

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.

Bubble chart view



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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:

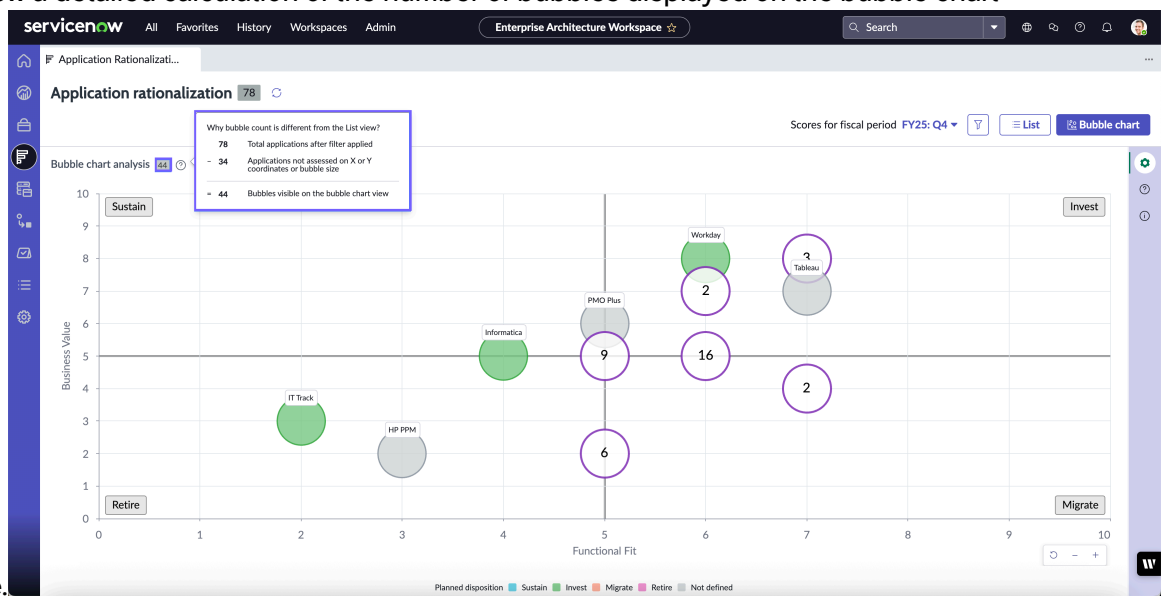
- The created indicator must also be attached to the default application profile. For information on how to attach new profile indicators with a scoring profile, see Attach a profile indicator with an application scoring profile.
- If the created indicator isn't displayed in the bubble size list, verify 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 ( ) to view a detailed calculation of the number of bubbles displayed on the bubble chart page.



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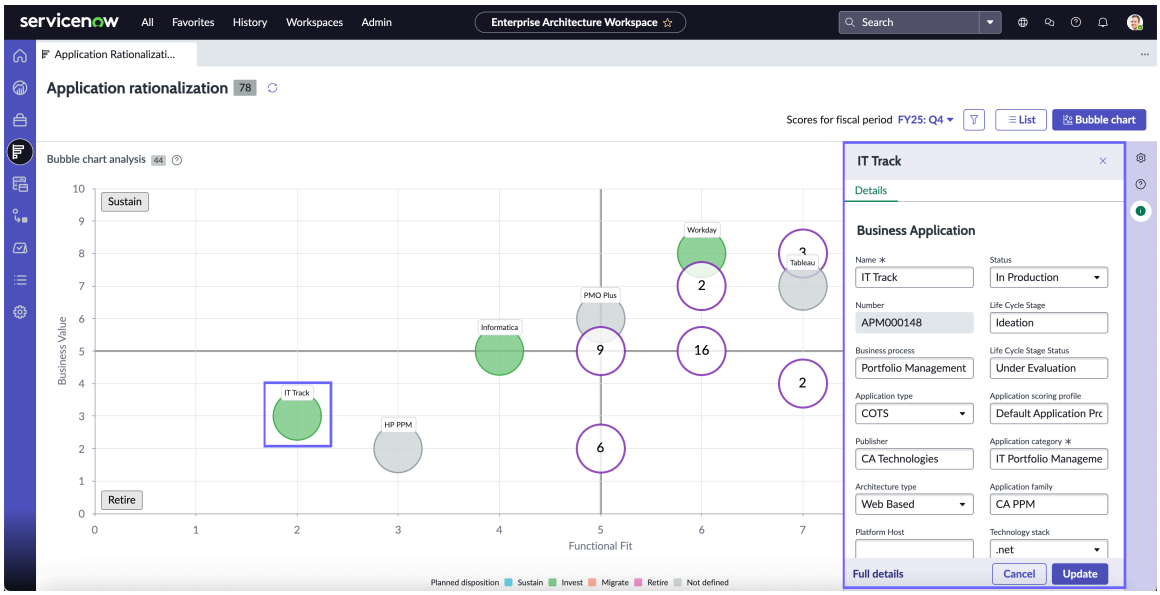
Understanding the bubble chart

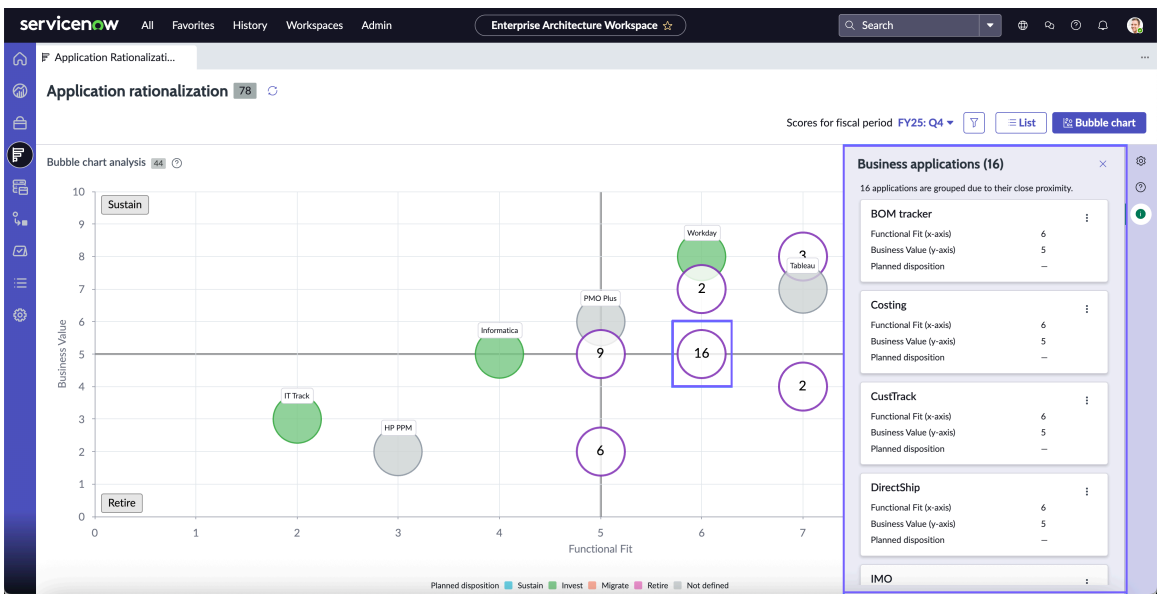
The bubble chart page has the following components:

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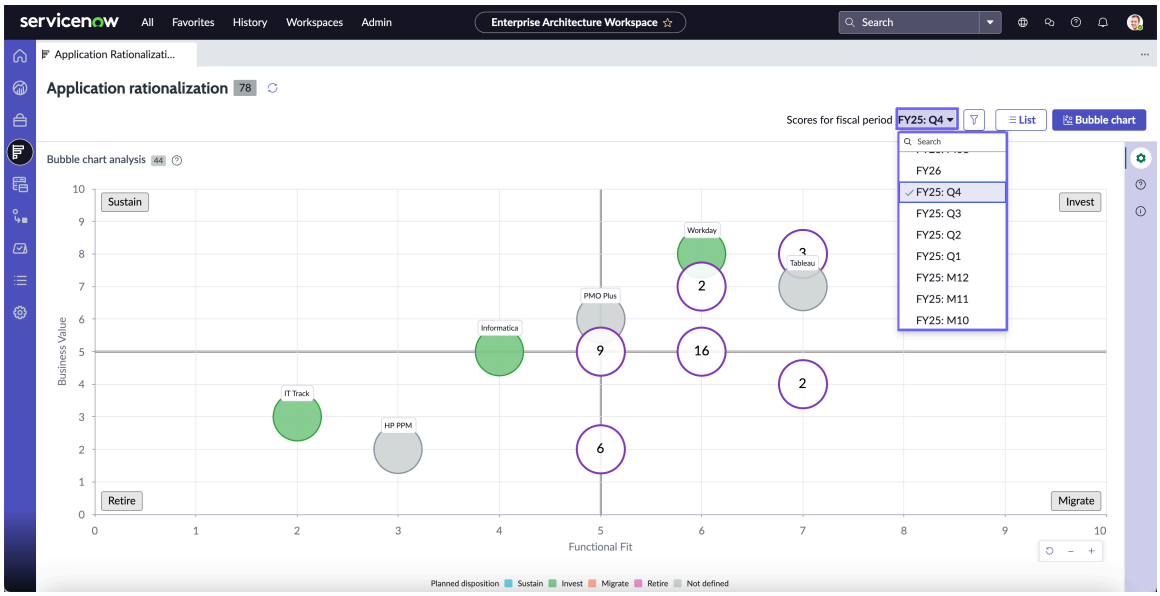
The bubble color is dependent on the planned disposition value that was already set for the business application. You can refer to the legend displayed on the bubble chart to see the significance of each color.

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 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 the bubble chart.

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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.
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

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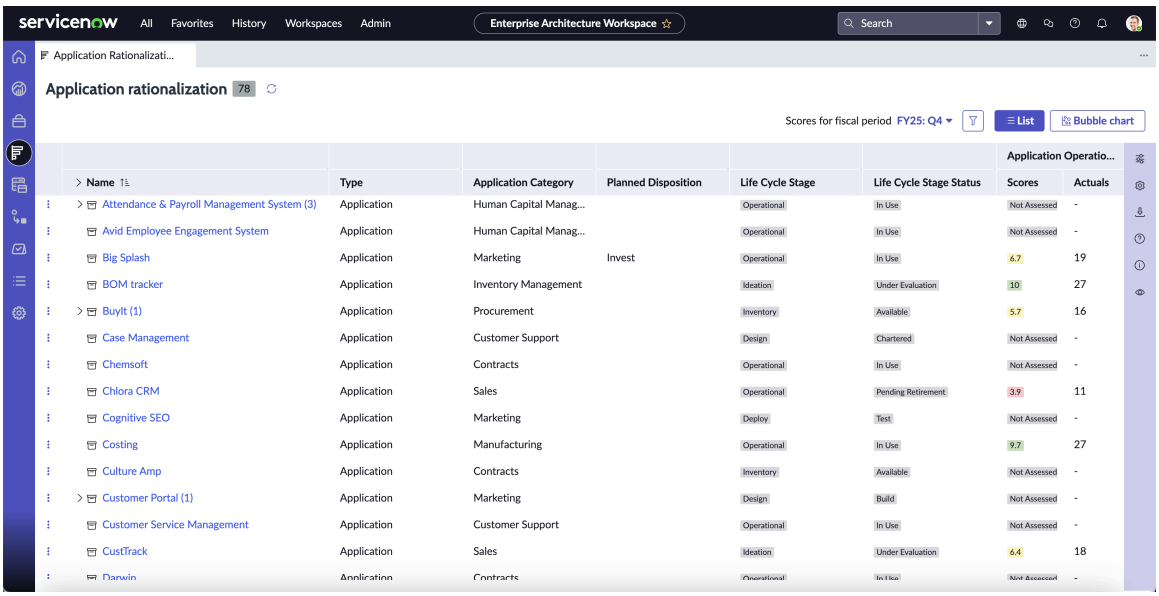
List view of application rationalization

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.

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 with an application 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.

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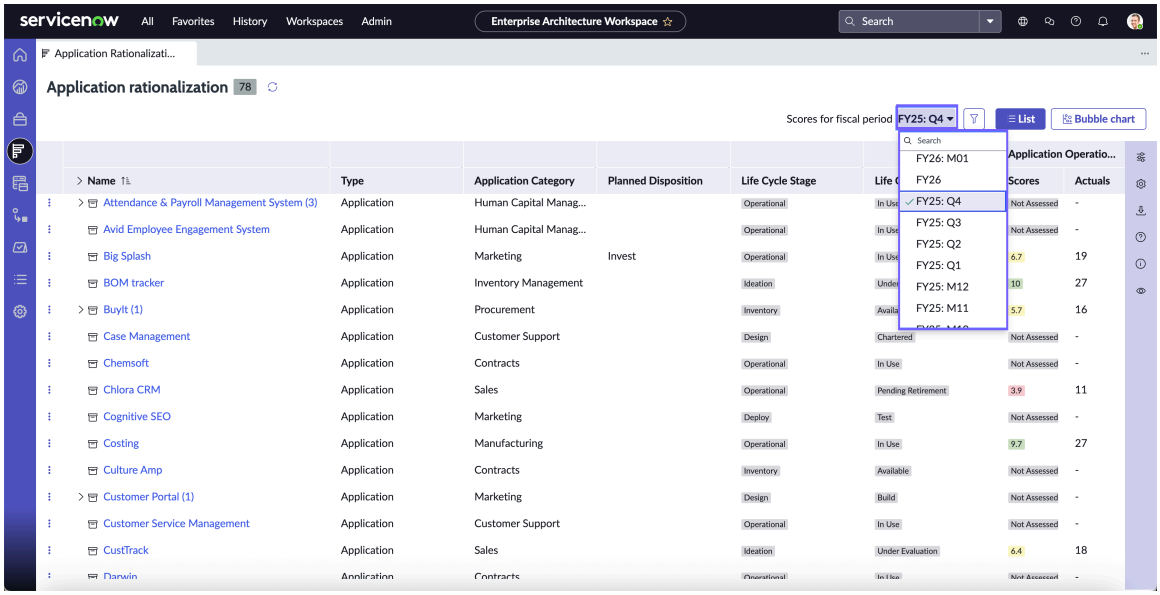

The latest fiscal period is derived from the apm_app_indicator_score list. The duration of a fiscal period is derived from the system property *com.glide.fiscal_calendar.fiscal_unit*.

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.

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.

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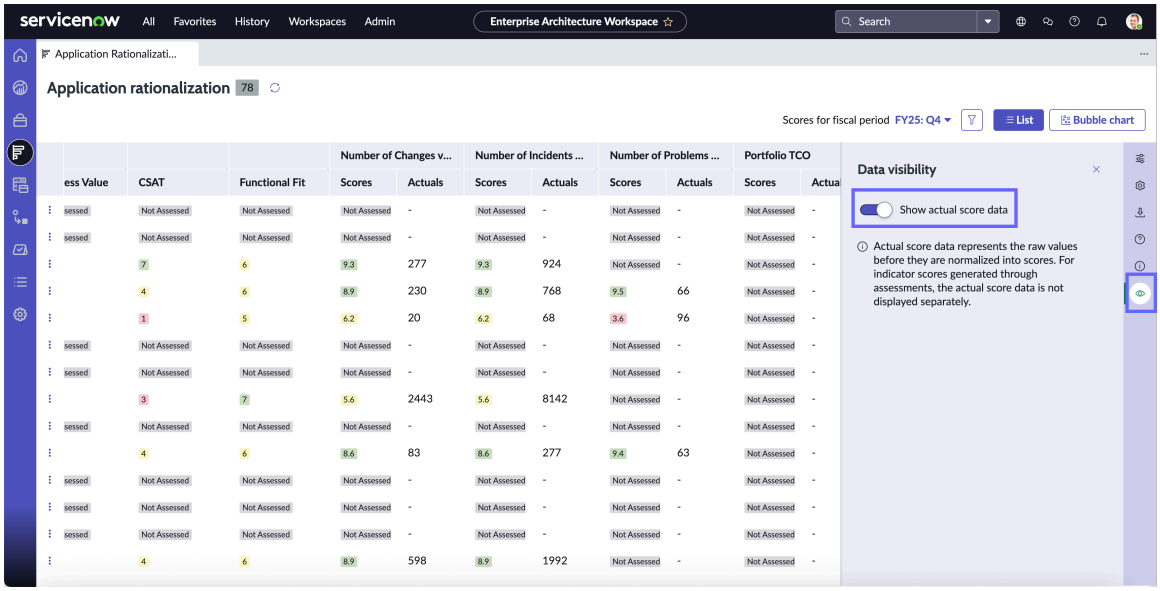
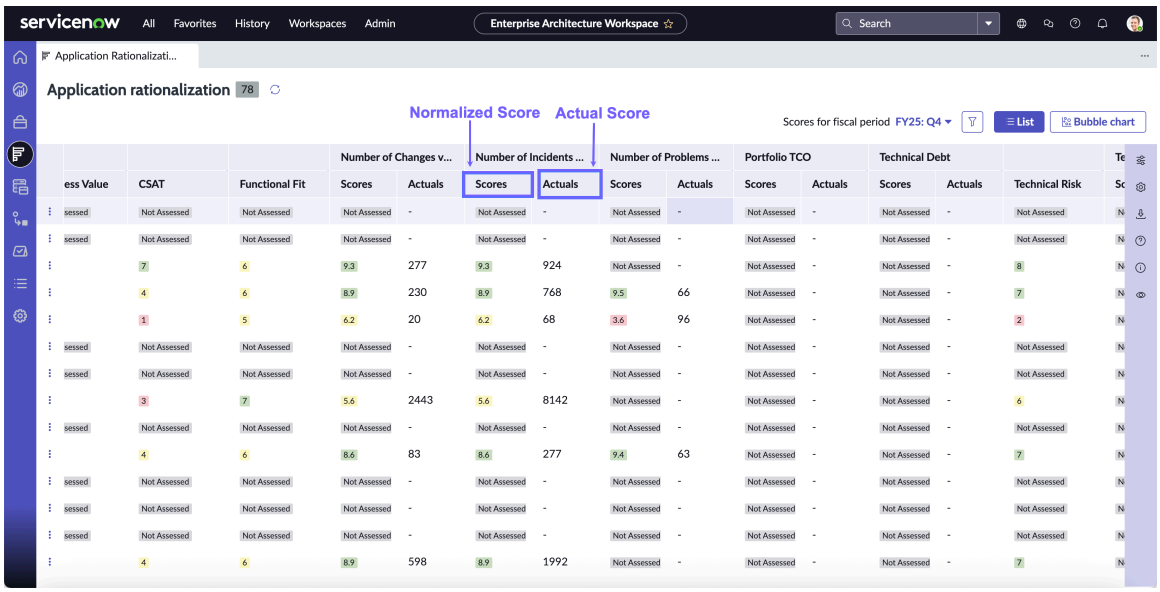


The actual indicator scores and their normalized values for business applications are displayed. For example, the actual column for the Number of Incidents indicator displays the actual number of incidents associated with the business application during the selected fiscal period.



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.

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- 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

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.

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:

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- 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

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 - Legacy. 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 Run a scheduled job to update TRM technical debt data in EA Workspace.

Regenerate indicator score

Update application indicator scores on-demand, to assess the application for a technical risk, and gather real-time insights, regenerate

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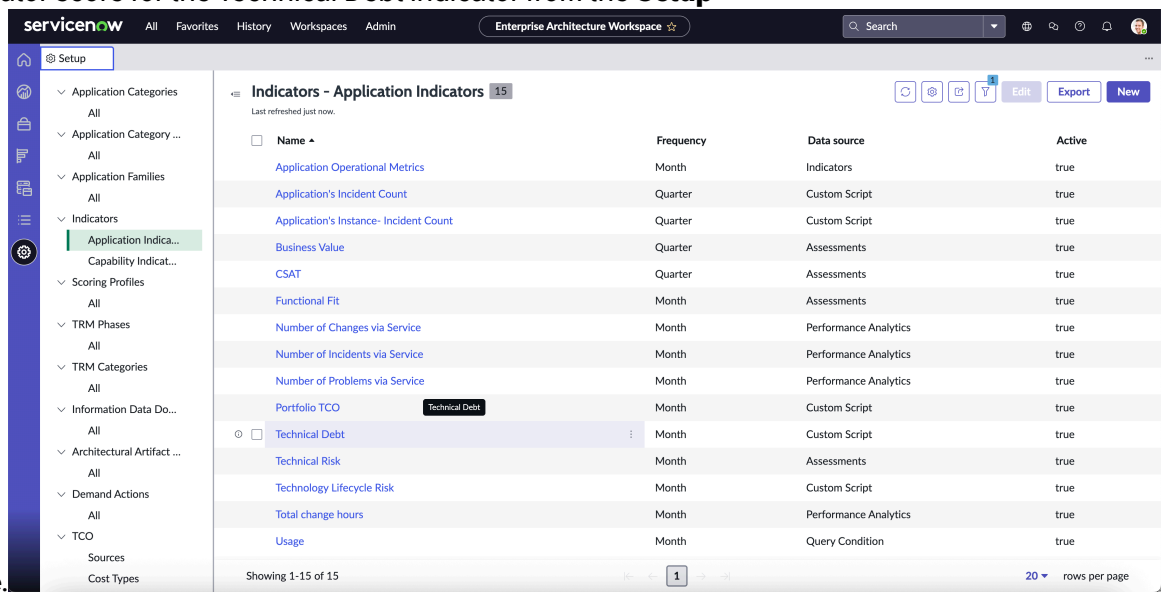
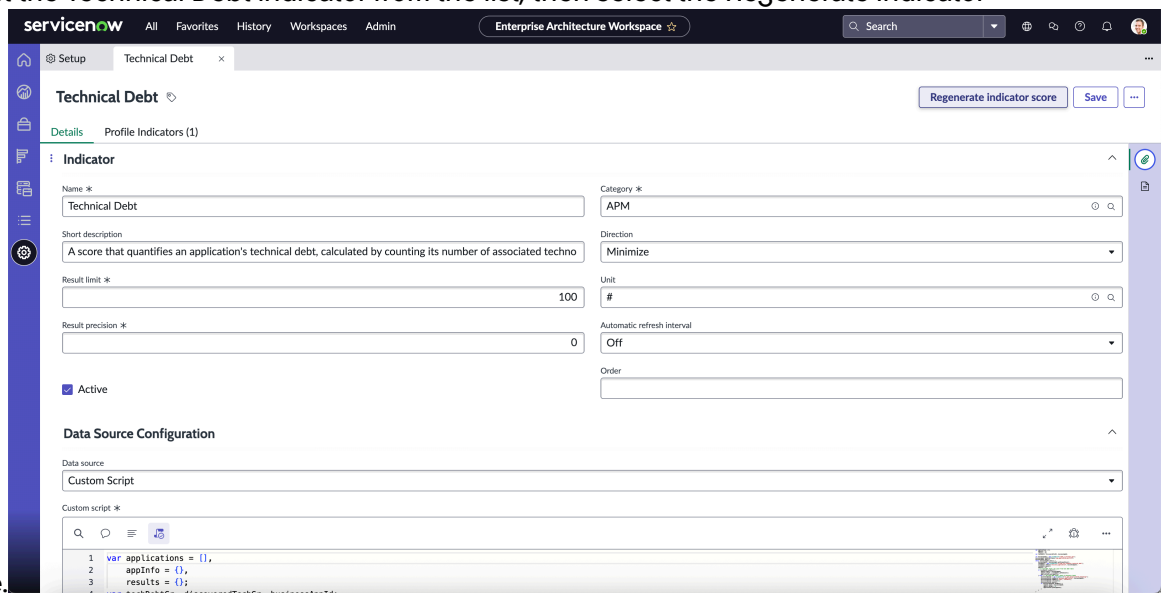
indicator score for the Technical Debt indicator from the **Setup** page.



Select the Technical Debt indicator from the list, then select the Regenerate indicator score.



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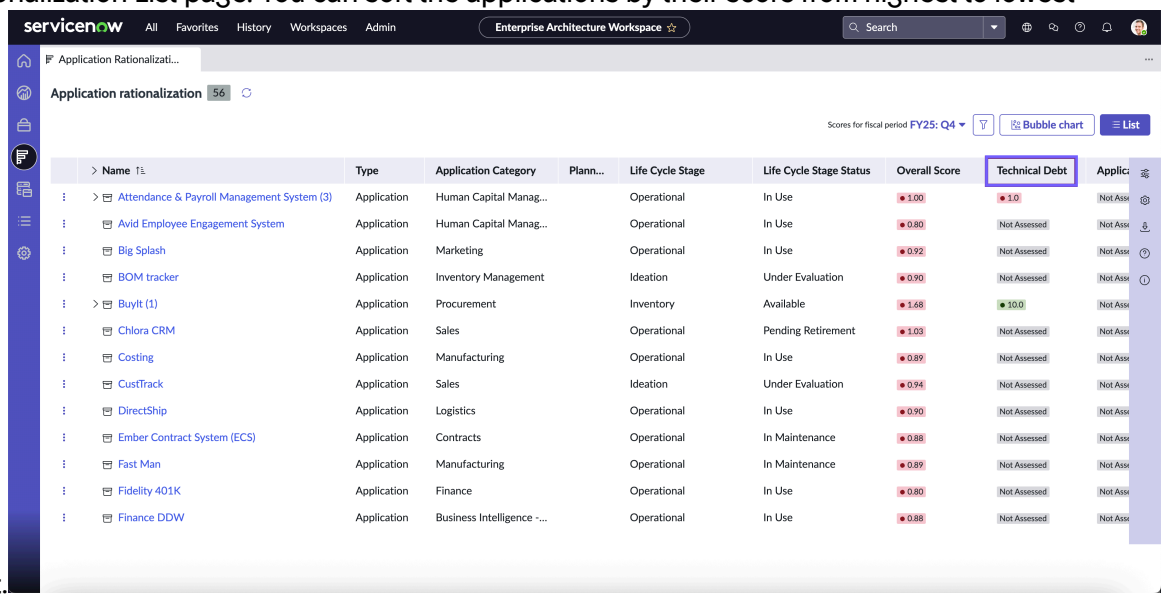
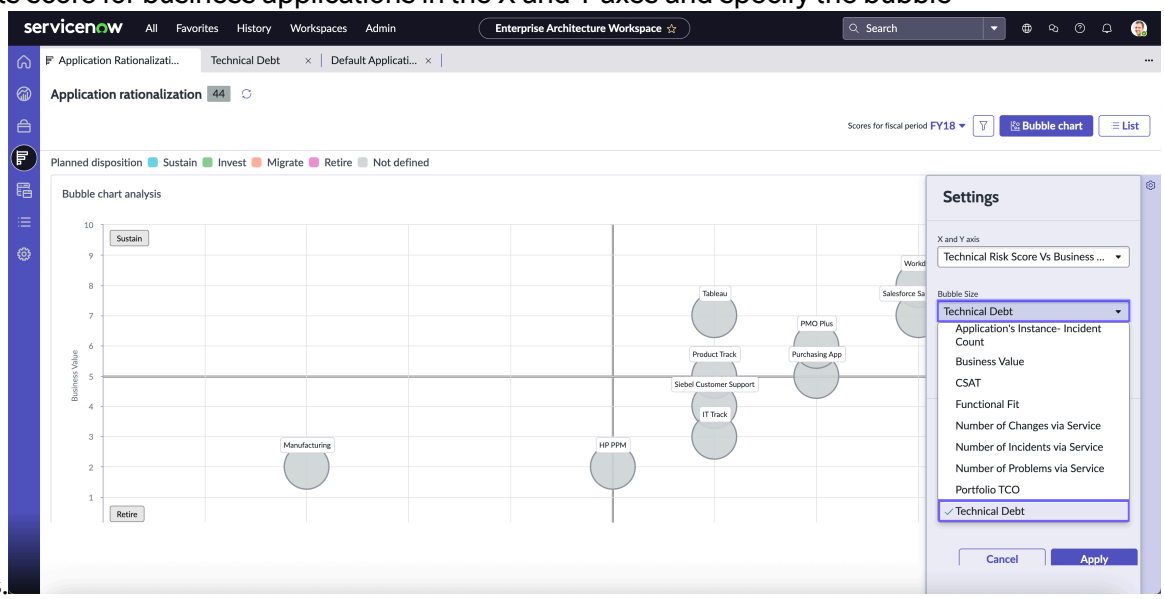
Technical Debt indicator score on the Application Rationalization List view page

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 to from the Bubble Size list to see its score for business applications in the X and Y axes and specify the bubble sizes.



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, information portfolio of your organization and 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.

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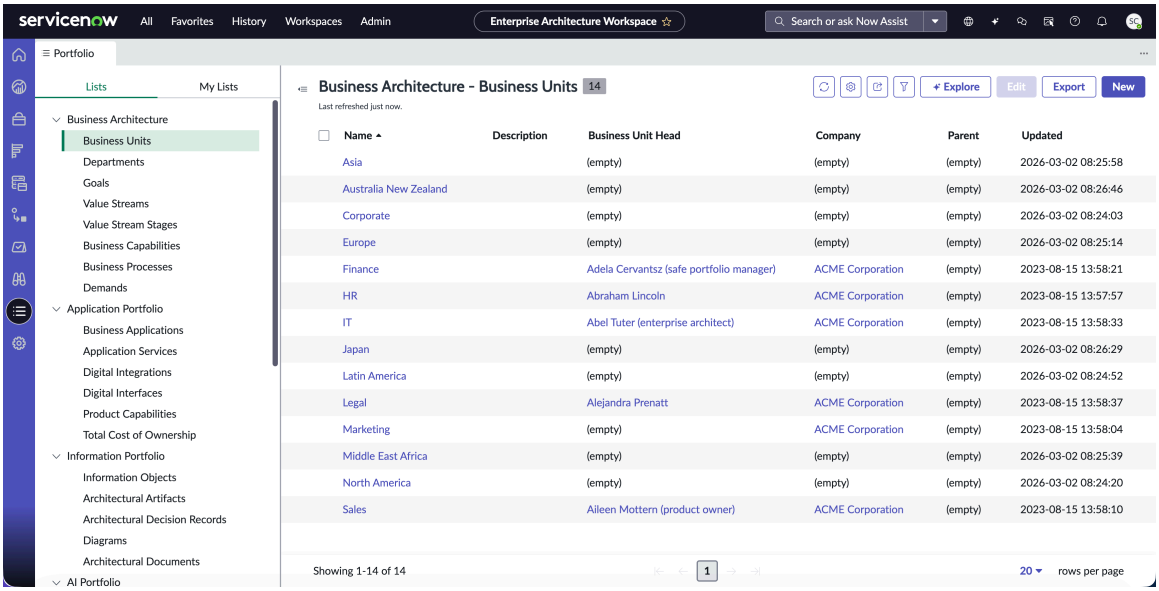
You can save, filter and export, or email the list. You can also create your own list and access it from the My Lists page.

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.

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.

Related topics

- View all business units
- Add or edit 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.

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

Related topics

- View all goals
- Add or edit a goal
- Add a quantitative target to a goal

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- Add a qualitative target to a goal
- Create a sub-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, the value of each step in the flow, and the application models associated with each step in the flow.

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
- Add an application model to a value stream
- Exploring value stream stages
- Manage value stream stages
- Exploring a business portfolio

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

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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

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.

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 in EA Workspace

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.

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.

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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.

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.

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.

Related topics

View all business processes

Add or edit a business process

Manage architectural artifacts of a business process

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 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.

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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:

- 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 distinction between the records whether it's a business application running on a host or a platform hosting the applications lies in the **Architecture type** values of platform application and platform host.

Related topics

View all business applications

Add or edit a business application

View business capabilities associated with a business application

Add an existing business capability to a business application

Remove business capabilities associated with a business application

Create a Lucidchart diagram for a business application in the EA Workspace

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 of a business application in EA Workspace

View architectural artifacts associated with a business application

Create an architectural artifact and associate it with a business application

Add an existing architectural artifact to a business application

Remove architectural artifacts associated with 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.

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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. AI governance decisions can be made 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.
- 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 cannot form a complete picture of that application's risk profile, conformance, or 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.

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Enterprise Architecture - AI Control Tower integration benefits for personas (continued)

Persona	Before integration	After integration
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:

- 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 understanding 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, being able to show which business applications an AI system supports — and 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 is under review. Managed systems are actively governed and tracked through their lifecycle in AI Control Tower.

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Unmanaged

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

Both sections are visible on the business application record so that enterprise architects can see not only the AI systems that have cleared governance review, but also 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:

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 assigned to the AI system during governance review.

How associations are created

An AI system is associated 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. This is the recommended intake path because it creates the AI system record in AI Control Tower and establishes the business application association in a single step.

  For information on how to create an AI use case, see Request an AI use case.

  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. This is useful for associating 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. Business applications with a status of Retired or a lifecycle stage of End of Life are excluded automatically, so 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.

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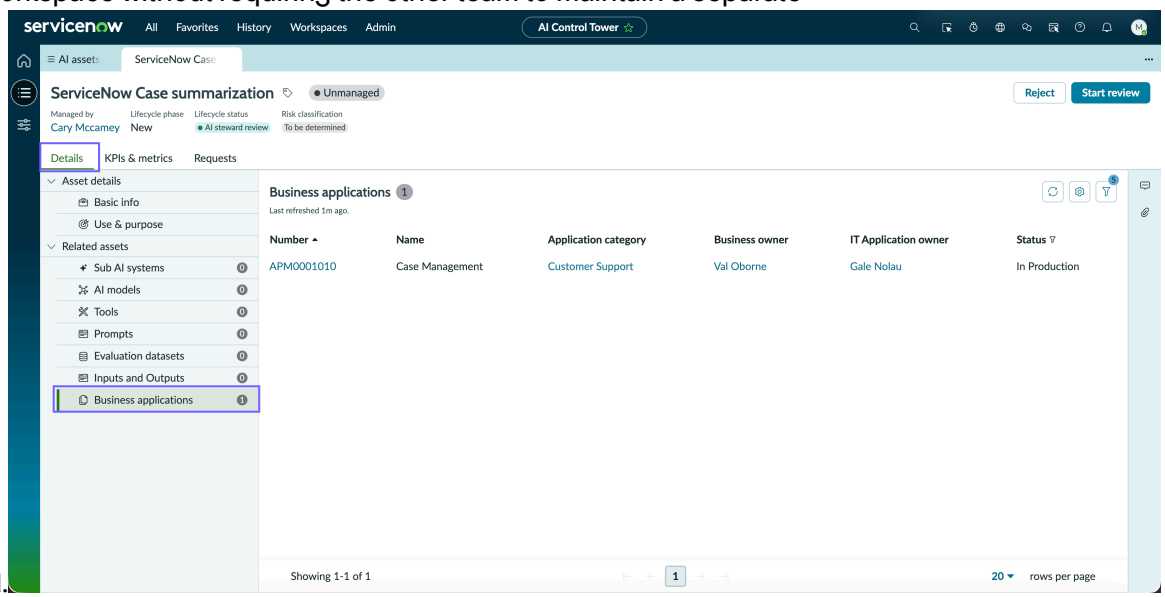
Viewing associated business application in AI Control Tower

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.

For enterprise architects who work primarily in the Enterprise Architecture Workspace and AI stewards who work primarily in AI Control Tower, this bidirectionality means each team sees the same associations from their own workspace without requiring the other team to maintain 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
- Remove an AI system from a business application
- View AI system details from a business application

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.

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Related topics

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

Exploring digital interfaces in Enterprise Architecture Workspace

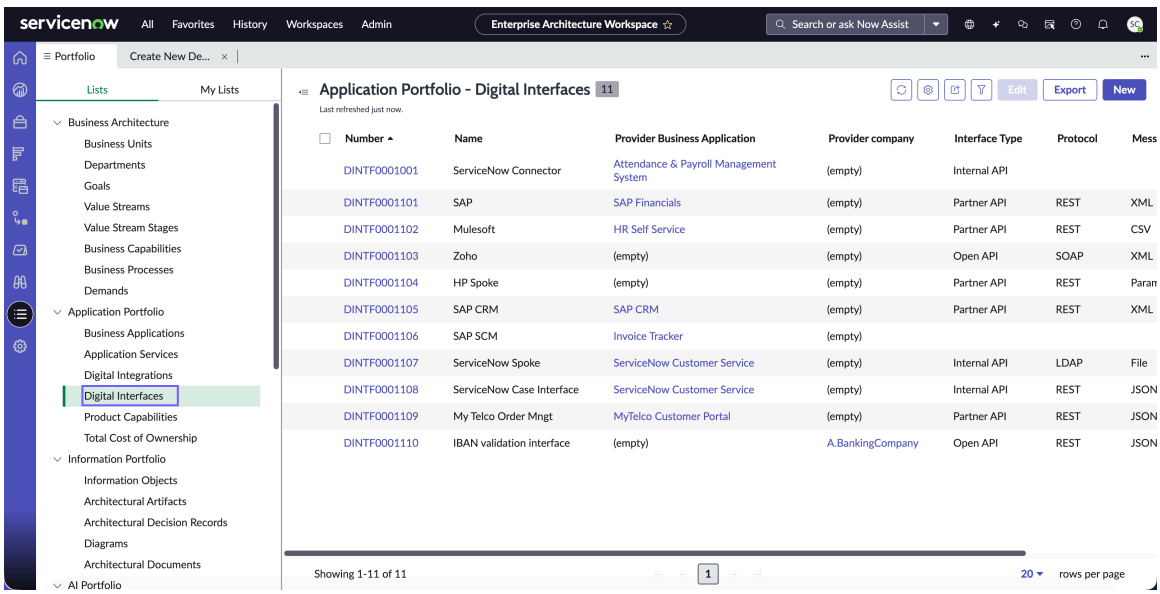
Manage all your digital interfaces from the Portfolio page of the Enterprise Architecture Workspace.

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
- Connect a digital interface with the CMDB API in the EA Workspace
- Manage architectural artifacts of a digital interface in EA Workspace
- 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.

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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.

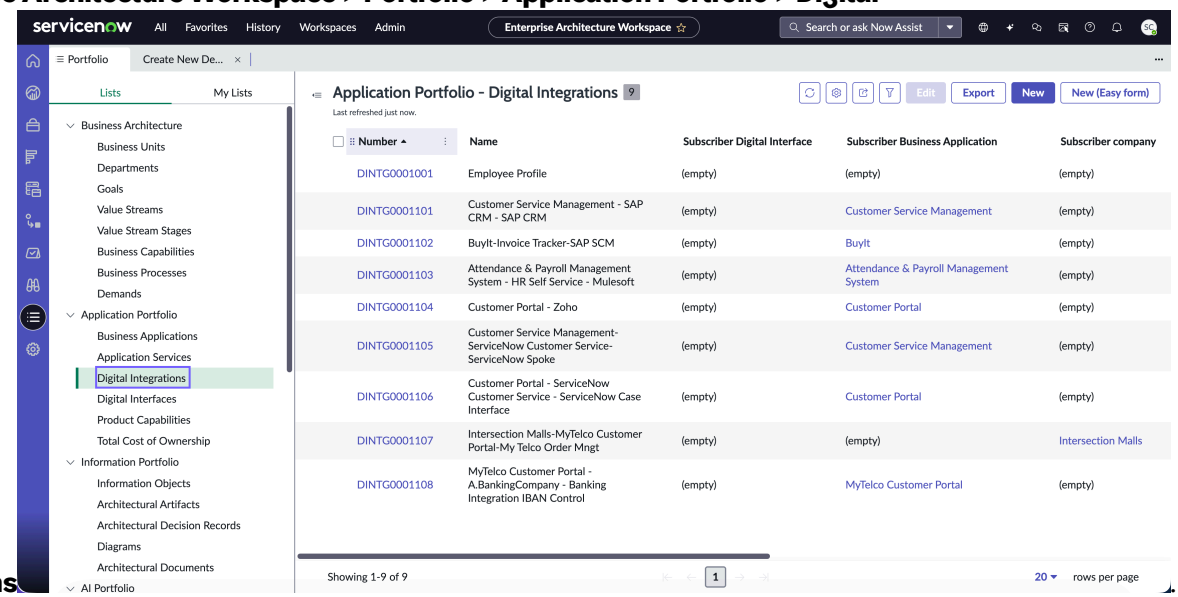
You can do the following:

- 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, including the introduction of a new digital interface if it doesn't exist.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 > 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

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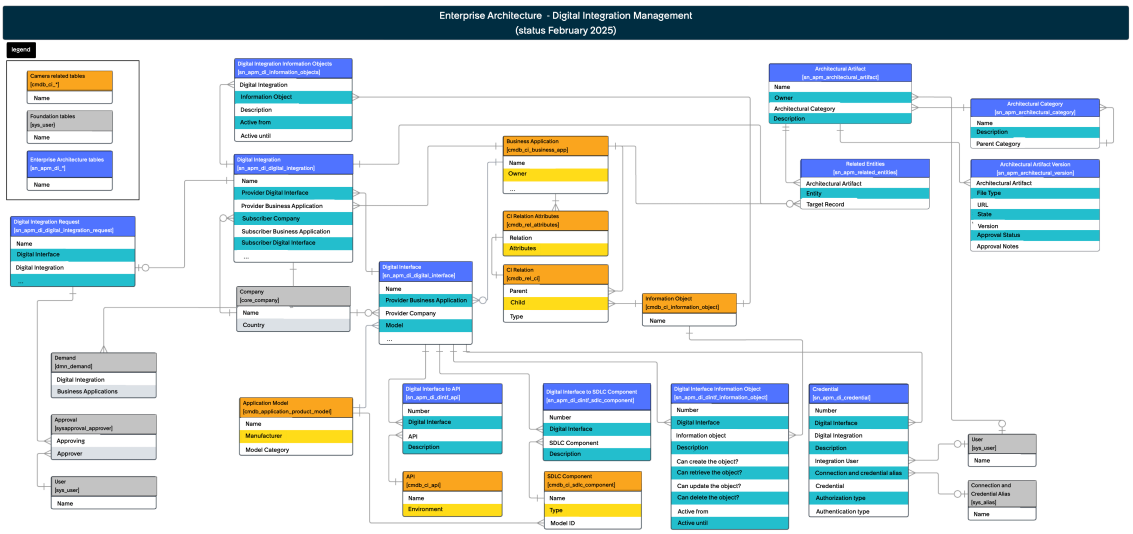
Digital integration management data model

This section shows the digital integration management data model.



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.

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.

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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.

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.

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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 of type URL or Attachment
- 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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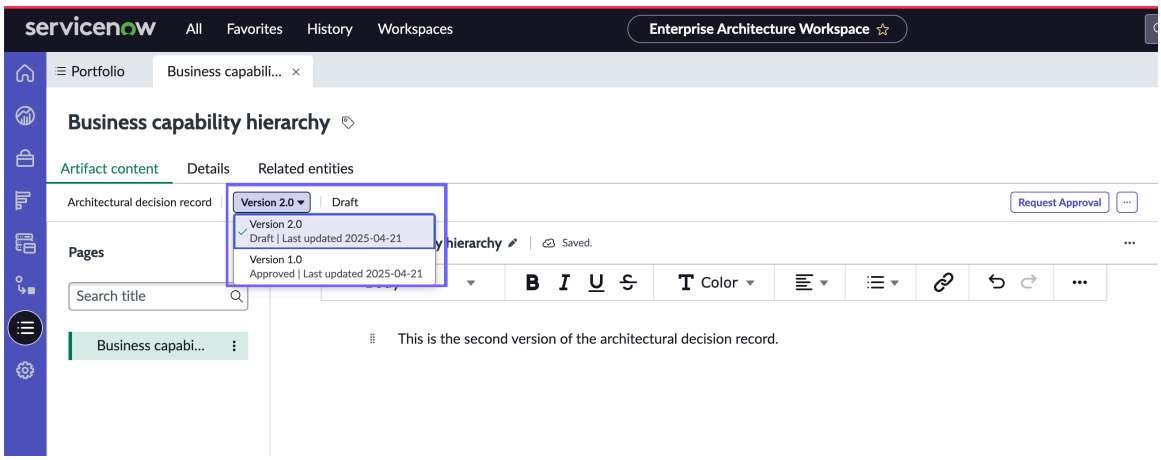
On selecting a particular version, you're directed to the ADR artifact content page for that version.



Summarize ADR content using Now Assist 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 Now Assist for Enterprise Architecture (EA)

Related topics

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

Exploring the AI Portfolio

The AI Portfolio section within the Portfolio page of the Enterprise Architecture Workspace helps you in managing structured governance, traceability, and lifecycles of AI assets.

The AI Portfolio section contains the following modules:

- **AI System Digital Asset**: AI system digital asset represents a software artifact that integrates one or more AI models and datasets. It answers the question, 'Where is the AI system running and how is it configured?'.
- **AI Model Digital Asset**: AI model digital asset represents the metadata and configurations of an AI model used by an AI system to generate its output. It answers the question, 'Where is this model running and how is it configured?'.
- **AI Dataset Digital Asset**: AI dataset digital asset represents the actual collection of data that is used to train and validate particular AI models. It answers the question, 'Where is this dataset running and how is it configured?'.

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- **AI Prompt Digital Asset**: AI prompt digital asset represents the structured input instruction provided to an AI model to elicit a specific response or behavior. It answers the question, 'Where is this prompt running and how is it configured?'.
- **AI System Product Models**: AI system product model represents the system that delivers the AI outcomes. It orchestrates models, data, runtime service, and interfaces to deliver AI functionality. It answers the question, 'Which AI system do you use and why?'.
- **AI Model Product Models**: AI model product model represents a structured record that catalogs an AI model's specifications and lifecycle details. It enables traceability between the AI model and the AI system that consumes it, as well as associated datasets and prompts. It answers the question, 'Which model do you use and why?'.
- **AI Dataset Product Models**: AI dataset product model represents the overall datasets that are available to train and evaluate AI models and systems. It answers the question, 'Which dataset do you use and why?'.
- **AI Prompt Product Models**: AI prompt product model represents the structured record that catalogs governed prompt templates used by AI models and systems and its intended use and conformance state. It answers the question, 'What prompts do you use and why?'.

Through the AI Portfolio section, you can perform the following:

- Track dependencies between AI systems, models, datasets, and prompts
- Understand the usage of the AI systems, models, datasets, and prompts across business capabilities and applications

Related topics

Working with AI Portfolio

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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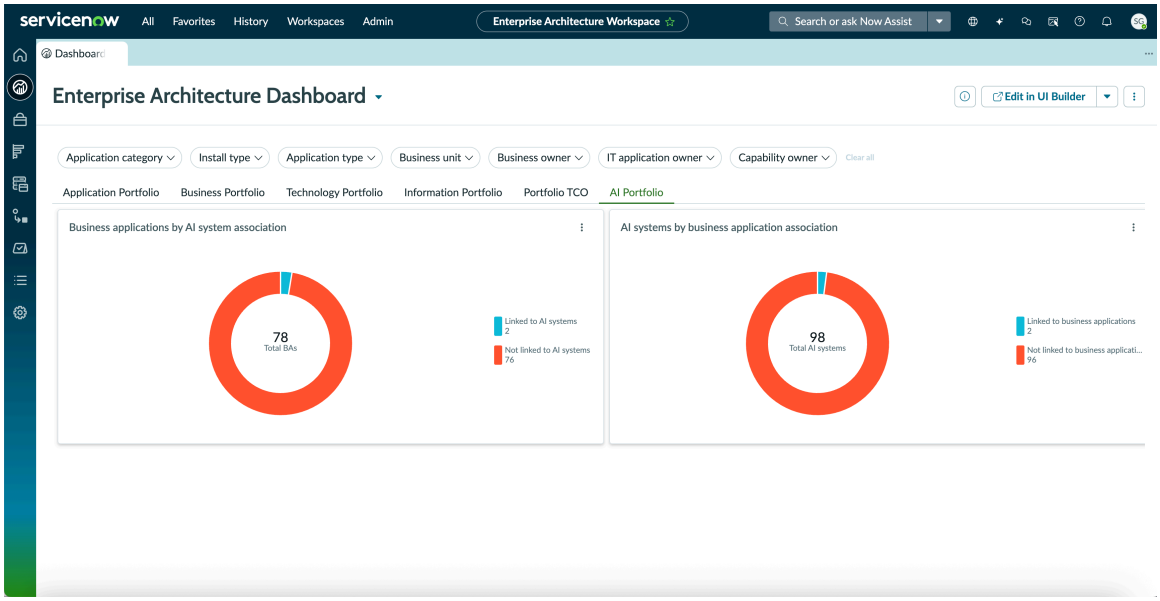

Business Applications by AI System Association

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 to evaluate the cost of business applications and leverage the 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

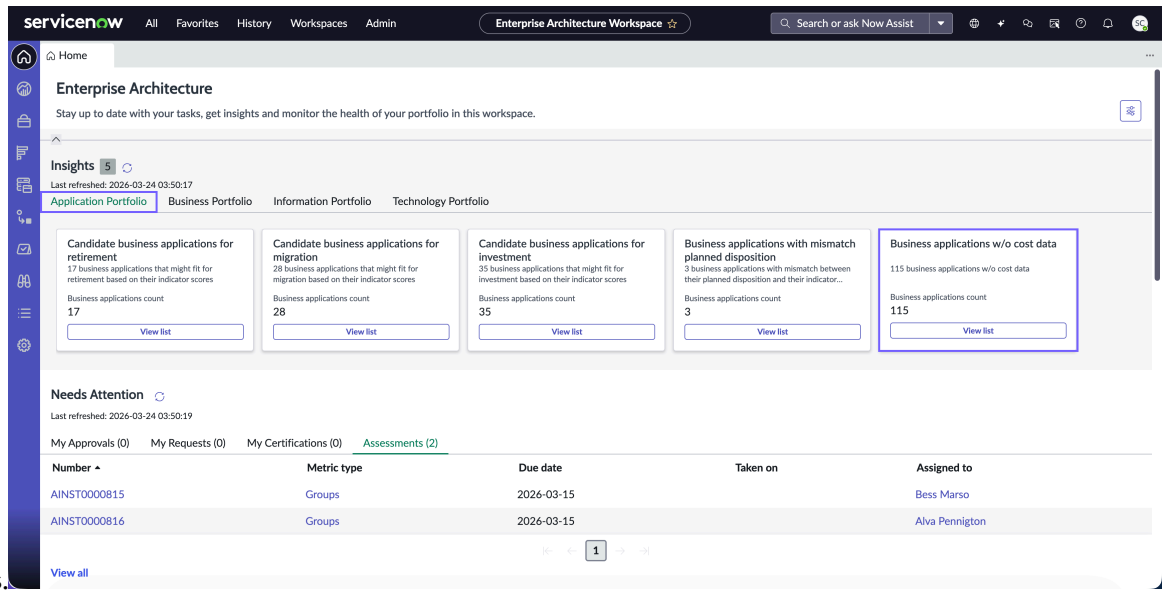
The **Portfolio TCO** tab in the **Dashboards** page displays the following dashboards for Application TCO:

- 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

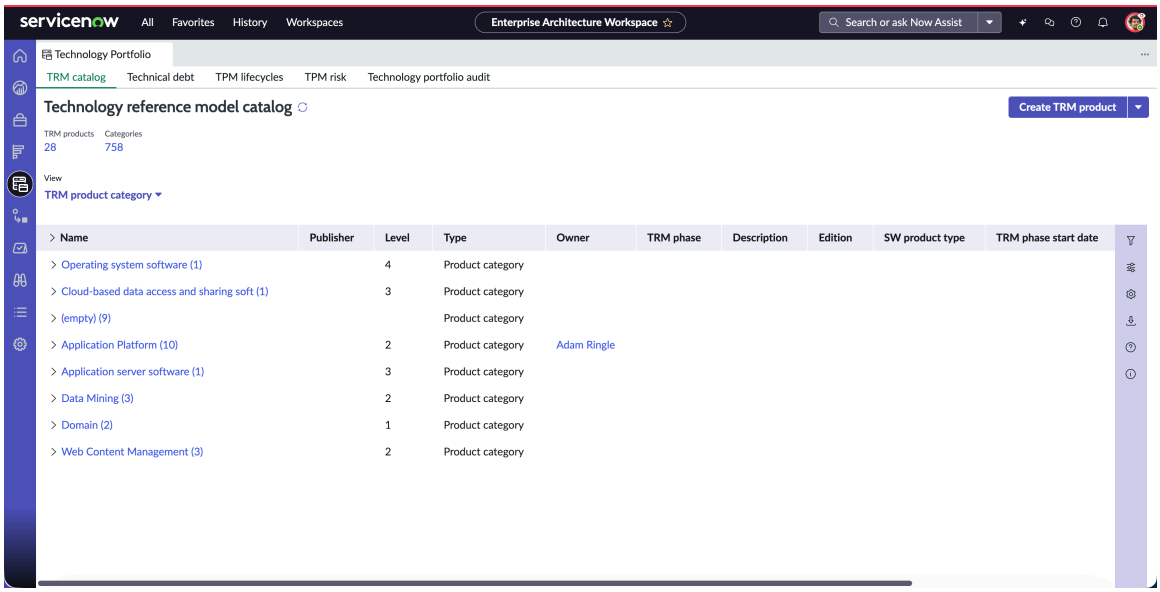
Exploring total cost of ownership (TCO) in Enterprise Architecture Workspace

Install the Application Total Cost of Ownership (TCO) plugin

Add or edit a total cost of ownership record

Exploring Technology Portfolio view

As an Enterprise Architect, use the Technology Portfolio list view in the Enterprise Architecture Workspace to manage your Technology Portfolio Management (TPM) lifecycles and risk and your Technology Reference Model (TRM) catalog (software and hardware).



Technology Portfolio Management

You can use Technology Portfolio Management to manage technology life-cycle risks and technology life-cycle exceptions.

For more information on Technology Portfolio Management, see Manage the Technology Portfolio Management (TPM) in Enterprise Architecture Workspace.

Technology Reference Model

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 Manage the 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**
- **TPM lifecycles**
- **TPM 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.

Manage the Technology Reference Model in Enterprise Architecture Workspace

You can use the Technology Reference Model (TRM) feature in Enterprise Architecture Workspace to 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 an 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. Also, you need a way to explore when a non-permitted software is being used within the organization and in which business applications.

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.

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 ensure clear accountability and improved governance standards. The owner is responsible for maintaining consistent technology compliance standards for that TRM category.

TRM Product Lifecycle

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

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The TPM home page fetches all the business applications that are being 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 TPM 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.

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 TPM and TRM lifecycle timelines
- TRM lifecycle timelines on Gantt chart
- Configure TRM phases
- Configure TRM categories

Manage TRM technical debt

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

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 EA 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 TRM Technical Debt calculation in Enterprise Architecture Workspace.

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.

Related topics

- TRM Technical Debt calculation in Enterprise Architecture Workspace
- View TRM technical debts
- Run a scheduled job to update TRM technical debt data in EA Workspace

TRM Technical Debt calculation in Enterprise Architecture Workspace

A TRM technical debt indicates the unapproved usage of a software. The technical debts table [sn_apm_trm_standards_technical_debt], displays the TRM products and associated business applications details, and the reason for the technical debt.

To view the TRM technical debts, you require Technology Portfolio Management [sn_apm_tpm] store application and SAM Foundation [com.snc.sams] plugin.

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Technical debts are created at two levels if any of the following conditions are met. The Level 2 is checked only if the system property *sn_apm_trm.is_product_life_cycle_tech_debt_enabled* is set to True.

- Level 1
  - If a product is associated with a business application, but isn't part of the TRM product list. (OR)
  - If a product is associated with a business application and part of the TRM products list, but has the TRM phase's production unapproved.
- Level 2
  - If a product is associated with a business application, is part of the TRM products list, and has the TRM phase's production approved but doesn't have any associated TRM Product life cycles. (OR)
  - If a product is associated with a business application and part of the TRM products list, has the TRM phase with production approved, and the TRM product lifecycle exists, one of the following cases is considered:

    Case 1: If the lifecycle full version of the software discovery model [cmdb_sam_sw_discovery_model] is not empty.

    A technical debt is created if the following condition isn't met for a TRM Product lifecycle:

    - TRM phase with production approved AND
    - TRM product's TRM phase with production approved AND
    - Version matching the lifecycle full version or wild card of the software discovery model [cmdb_sam_sw_discovery_model] AND
    - Phase start date <= Today's date <=phase end date.

    Case 2: If the life cycle full version of the software discovery model [cmdb_sam_sw_discovery_model] is empty.

    Technical debt is created if the following condition isn't met for a TRM Product Lifecycle:

    - TRM phase with production approved AND
    - TRM product's TRM phase with production approval AND
    - Version matching (exact match or wildcard match) the version of software discovery model [cmdb_sam_sw_discovery_model] AND
    - The edition of TRM lifecycle matching with edition for software discovery model [cmdb_sam_sw_discovery_model] AND
    - Phase start date <= Today's date <=phase end date.

Work with TRM lifecycle with wildcard

You can use Technology Reference Model (TRM) lifecycles with wildcards to update multiple TRM software product lifecycles simultaneously without having to specify the exact minor version details of individual TRM software products.

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 Add a TRM product lifecycle.

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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 Add a TRM product lifecycle.

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.

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

- Manage TRM technical debt
- View TRM technical debts
- TRM Technical Debt calculation in Enterprise Architecture Workspace
- Run a scheduled job to update TRM technical debt data in EA Workspace
- Add a TRM product lifecycle

Manage the Technology Portfolio Management (TPM) in Enterprise Architecture Workspace

Technology Portfolio Management helps Enterprise Architects to manage 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.

The underlying technologies of the business applications used in your business enterprise have a shelf life that must be actively managed and diligently monitored 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, there are risks where the vendor may not support them any longer and 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

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- Assess the risks in using outdated software
- Plan to retire them just like the applications they support, at a definite date
- Support upgrade processes

The data for the software products are populated from the Computer (CMDB_CI_Computer) and all similar instances of the table, Docker Container (CMDB_CI_Docker_Container), and Serverless Hardwares (CMDB_CI_Serverless_Hardware) tables, by default. However, if you want to include other CMDB tables that contain software products, you must 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.

Installing the Technology Portfolio Management plugin

For instructions to install Technology Portfolio Management, see Activate the Technology Portfolio Management (TPM) plugin.

Important: Technology Portfolio Management (TPM) 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 Software Asset Management Foundation plugin migration documentation.

TPM indicators in EA Workspace

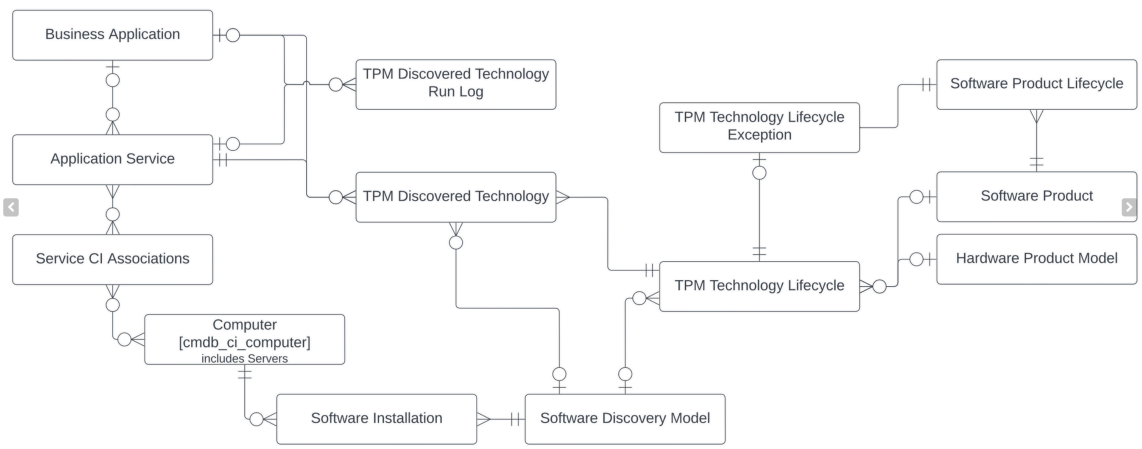
The following are the indicators for Technology Portfolio Management (TPM) in EA Workspace:

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

TPM reference model in EA Workspace

In EA Workspace, the Technology Portfolio 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*.

TPM Reference Model



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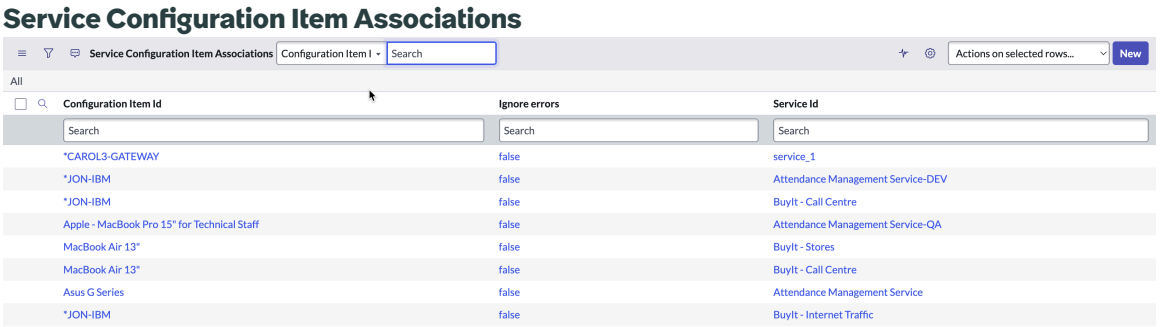
Technology discovery process in EA Workspace

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

- 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 TPM 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 TPM.
- For each discovery model, create a TPM Discovered Technology record.
- When you create a record for the TPM Discovered Technology, it triggers the creation of an associated TPM Technology Lifecycles record and it fetches the lifecycle information for the hardware or software technology. An unique TPM lifecycle record identifier is also generated. On selecting the record identifier, more information on the TPM lifecycle record is displayed.

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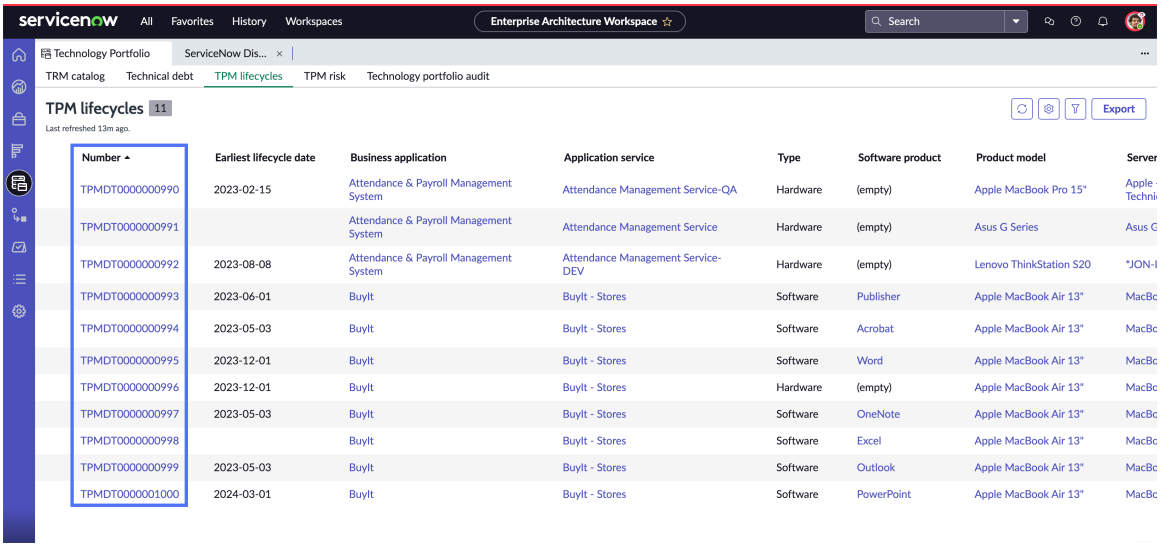
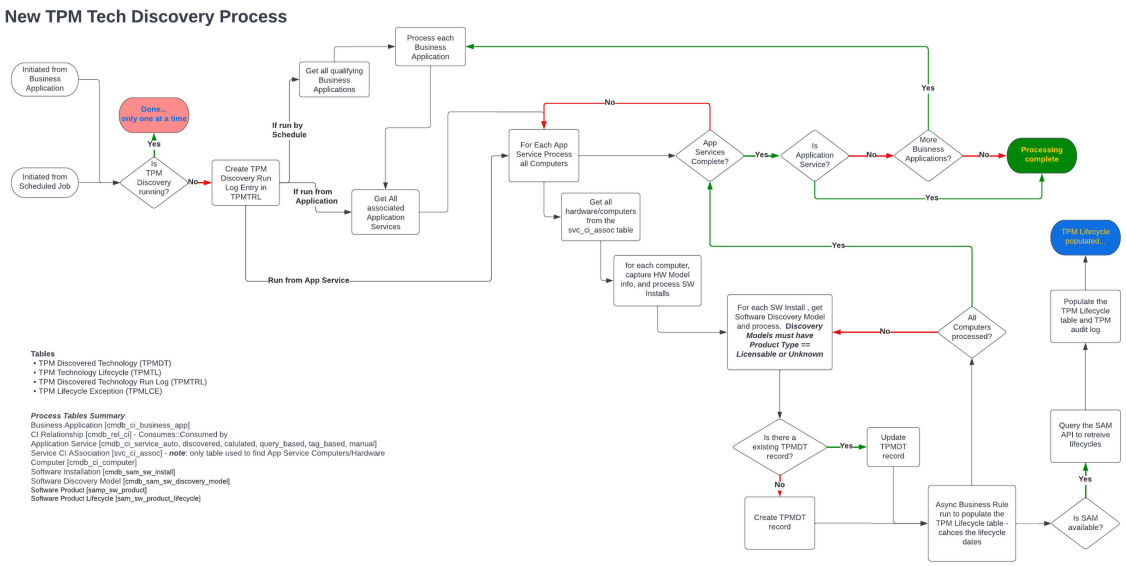


Number	Earliest lifecycle date	Business application	Application service	Type	Software product	Product model	Server
TPMDT0000000990	2023-02-15	Attendance & Payroll Management System	Attendance Management Service-QA	Hardware	(empty)	Apple MacBook Pro 15"	Apple Techni
TPMDT0000000991		Attendance & Payroll Management System	Attendance Management Service	Hardware	(empty)	Asus G Series	Asus G
TPMDT0000000992	2023-08-08	Attendance & Payroll Management System	Attendance Management Service-DEV	Hardware	(empty)	Lenovo ThinkStation S20	"JON-I
TPMDT0000000993	2023-06-01	BuyIt	BuyIt - Stores	Software	Publisher	Apple MacBook Air 13"	MacBc
TPMDT0000000994	2023-05-03	BuyIt	BuyIt - Stores	Software	Acrobat	Apple MacBook Air 13"	MacBc
TPMDT0000000995	2023-12-01	BuyIt	BuyIt - Stores	Software	Word	Apple MacBook Air 13"	MacBc
TPMDT0000000996	2023-12-01	BuyIt	BuyIt - Stores	Hardware	(empty)	Apple MacBook Air 13"	MacBc
TPMDT0000000997	2023-05-03	BuyIt	BuyIt - Stores	Software	OneNote	Apple MacBook Air 13"	MacBc
TPMDT0000000998		BuyIt	BuyIt - Stores	Software	Excel	Apple MacBook Air 13"	MacBc
TPMDT0000000999	2023-05-03	BuyIt	BuyIt - Stores	Software	Outlook	Apple MacBook Air 13"	MacBc
TPMDT0000001000	2024-03-01	BuyIt	BuyIt - Stores	Software	PowerPoint	Apple MacBook Air 13"	MacBc

Note:

- TPM lifecycle record identifiers are automatically generated on creating a TPM record using the Technology Portfolio Management (sn_apm_tpm) plugin version 1.9.0. However, for TPM lifecycle records generated using previous versions of the TPM plugin don't have any lifecycle record identifiers. The TPM record identifiers of these TPM 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 Portfolio 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:

- Business Application [cmdb_ci_business_app]
- CI Relationship [cmdb_rel_ci] - Consumes::Consumed by

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- 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.

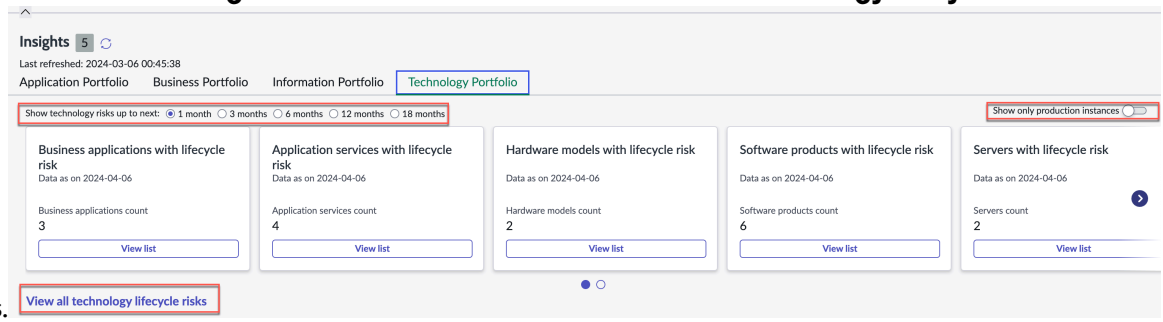
Hardware requires the Hardware Model reference on the Computer be populated.

Update TPM Data for a business application or application service

You can manually refresh the TPM 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 - Legacy

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, 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.

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- Execute the Populate Technology Lifecycle Risks scheduled job to generate the TPM technology lifecycle risks. This scheduled job populates the risk scores for business applications (BA), application services (AS), software products, and hardware models 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 - Legacy.

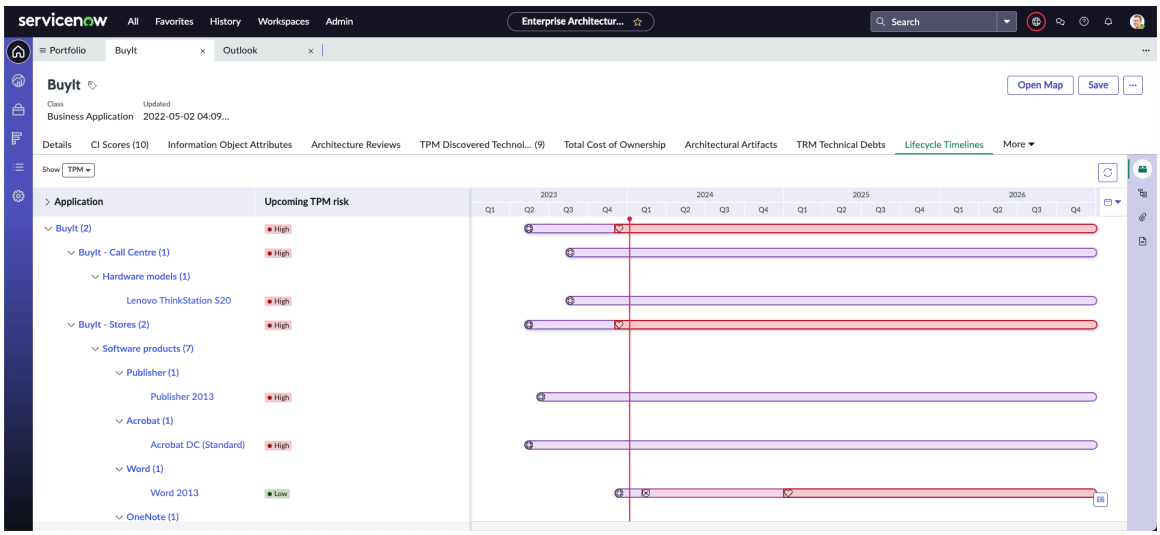
View TPM analysis run logs

You can track the progress of TPM 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.

TPM lifecycle timelines on Gantt chart

For the Technology Portfolio Management (TPM), 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 TPM phase start date of either the software products or hardware models are rolled up to calculate the TPM phase start date of the overall application service. That is, the earliest TPM phase start date of any software product or hardware model is taken as the TPM phase start date of the application service, overall. For more details, see TPM lifecycle timelines on Gantt chart and View TPM and TRM lifecycle timelines on the Gantt chart.



Data visualization for TPM data

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

Related topics

- Working with Technology Portfolio Management (TPM) in EA Workspace
- Gantt view of TPM and TRM lifecycle timelines
- TPM lifecycle timelines on Gantt chart
- View TPM and TRM lifecycle timelines on the Gantt chart

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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.

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 including end of support date, end of extended support date, and end of life date for your software products and hardware models by querying the ITAM content library.

For more details, see Schedule a job to generate TPM lifecycle data - Legacy and Run a scheduled job to generate TPM lifecycle data - Legacy.

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 whenever an exact lifecycle version match or 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 for your applications hierarchy helps you in the following:

- Visual representation: The diagrams and models provide a visual representation of complex enterprise structures, processes, and relationships. This visual representation helps your stakeholders, including executives and IT to understand the complexities of the organization.
- Effective communication: Diagrams serve as a common language that bridges the gap between technical and non-technical stakeholders. They enable effective communication and collaboration between different teams and departments within an organization.
- Improved decision making: The diagramming and modeling capabilities enable decision makers to make informed decisions. They can assess the impact of proposed changes,

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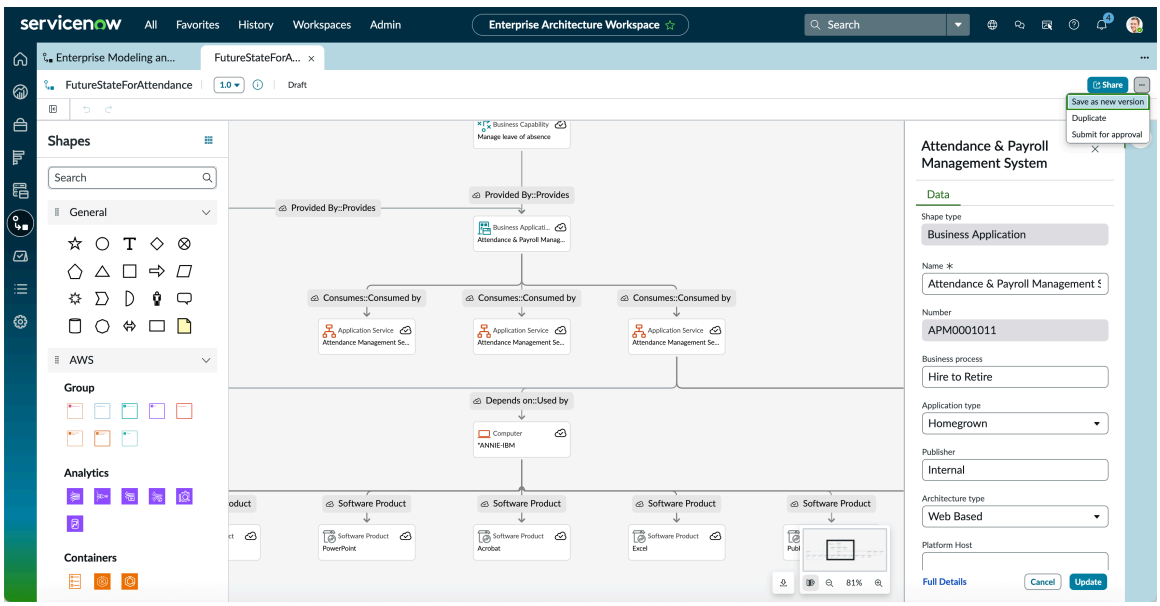
evaluate different scenarios, and identify potential risks before implementing strategies or projects.

- Alignment with business goals: Diagrams and models help you align your IT initiatives with overall business goals. They provide a holistic view of the business and confirm that IT 's investments are strategically aligned with business goals.
- Change management: The modeling capabilities facilitate change management by illustrating how changes impact the entire enterprise. This helps plan and execute transformations that run smoothly and with minimal disruption.
- Regulatory and governance compliance: Many regulatory agencies and standards organizations require documentation and adherence to architectural guidelines. Modeling helps you verify compliance and governance by providing a structured framework for managing architectural artifacts.
- Efficiency and cost reduction: By identifying redundancies, optimizing processes, and streamlining operations, modeling and diagramming can lead to cost reductions and improvements in operational efficiency.



Installing 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**: This section enables you to use different kinds of 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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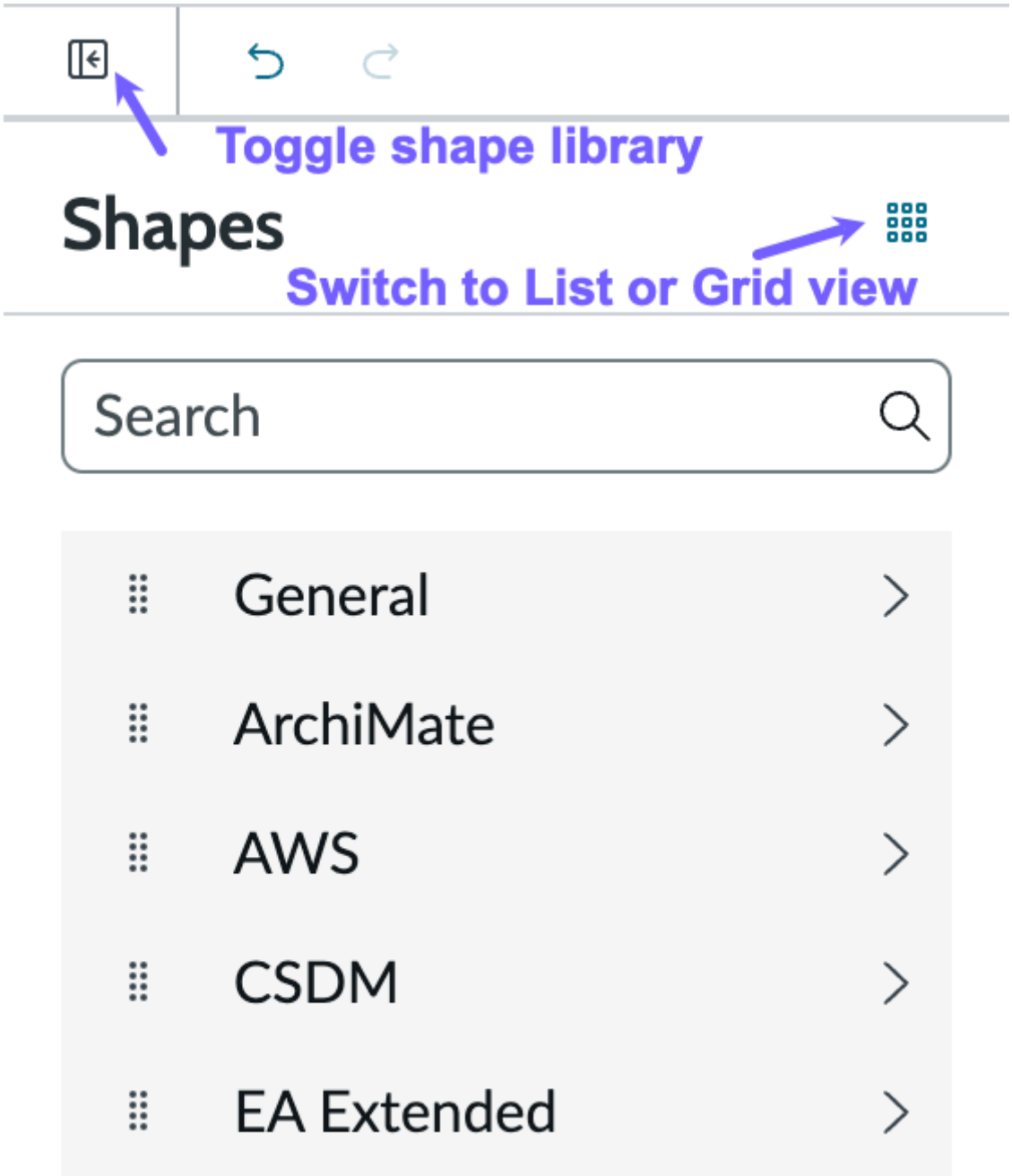

Use the Toggle Shape Library icon to show or hide the shapes panel on the canvas.

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. Pulling outward increases the shape dimensions, while 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 showing 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.

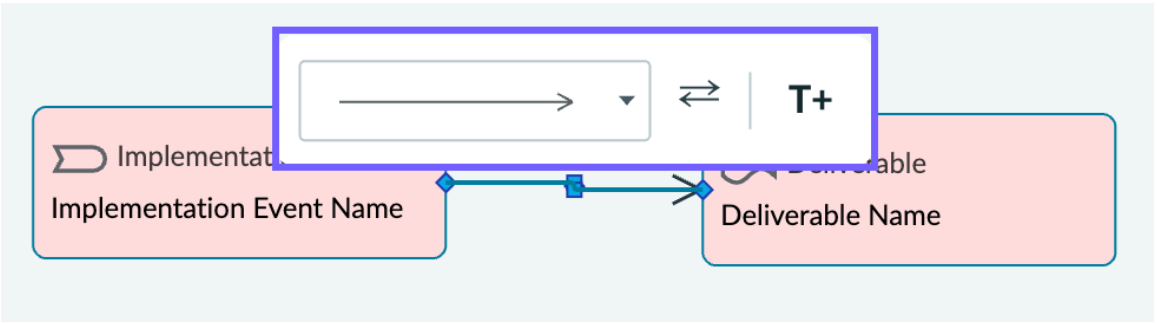
- **Label connector lines**: Select a connector line between shapes in a diagram and select **T+** in the connector toolbar to add a label. For more information, see Add labels to connector lines between shapes in a diagram.

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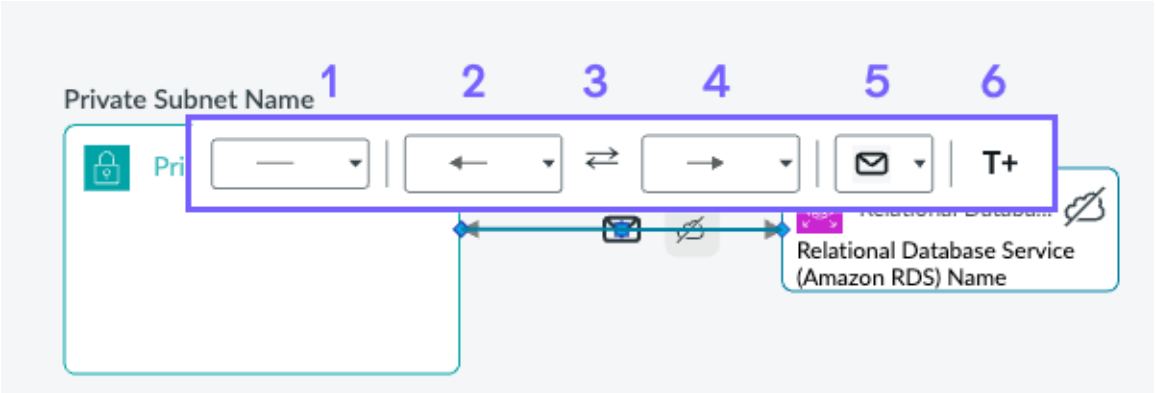
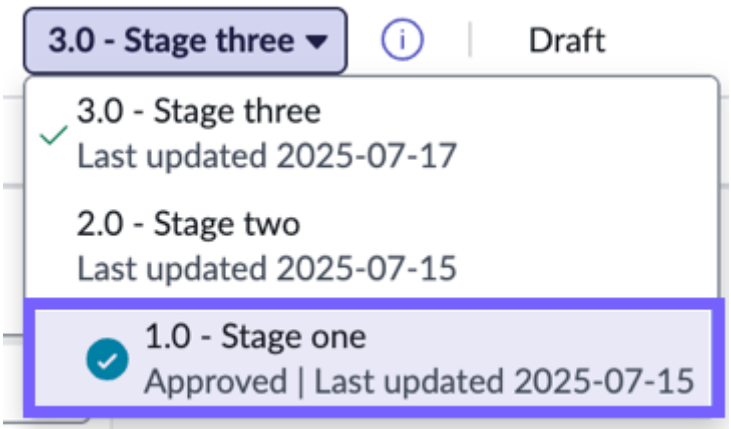
- **Icon**: Adds a BPMN message flow decorator icon to the connector.
- **T+**: Adds a text label to the connector.

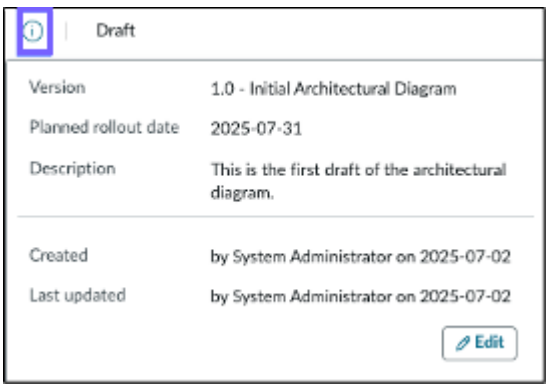


For more information, see Shape connector properties in Enterprise Modeling and Visualization and Set shape connector properties in Enterprise Modeling and Visualization.

- **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 day.



- **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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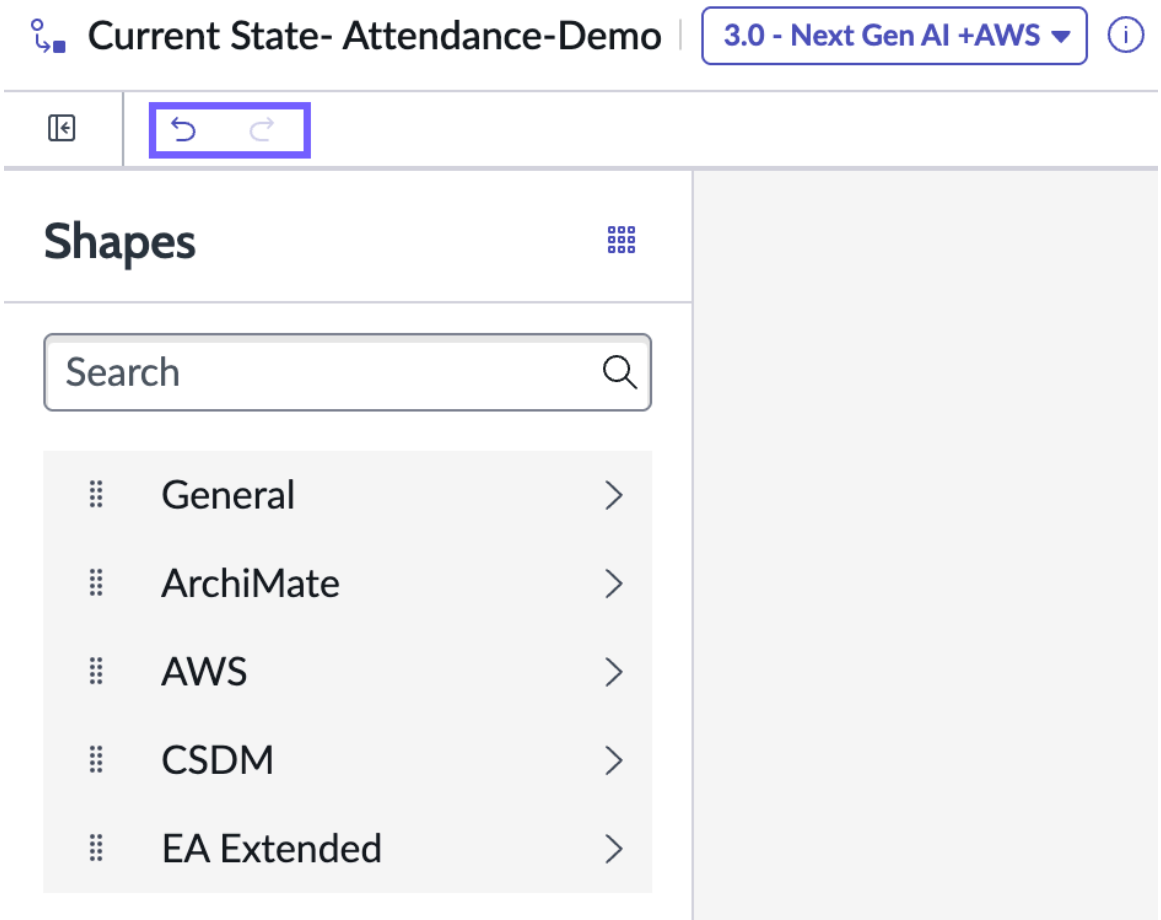

- **Align and distribute shapes**: Select two or more shapes on the canvas to align them to a common edge or center. Select three or more shapes to also distribute them at equal spacing. For more information, see Align and distribute shapes in a modeling diagram.

- **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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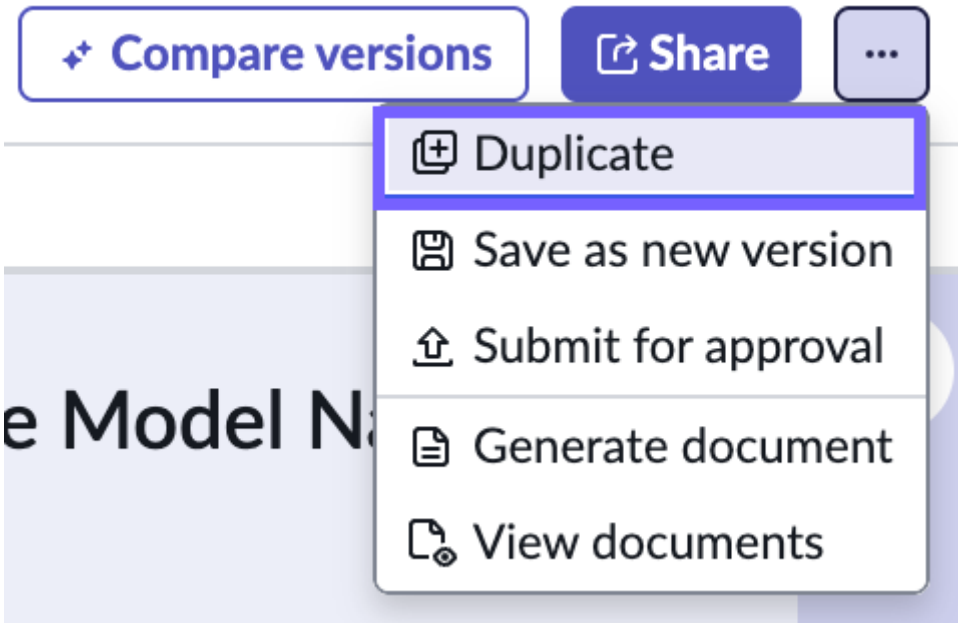
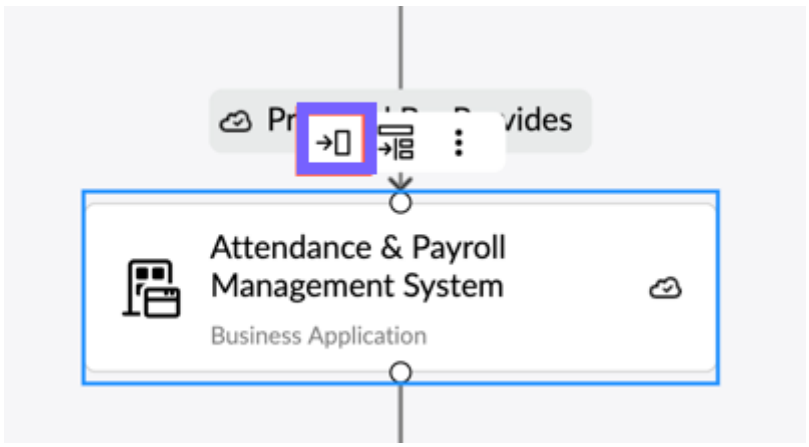
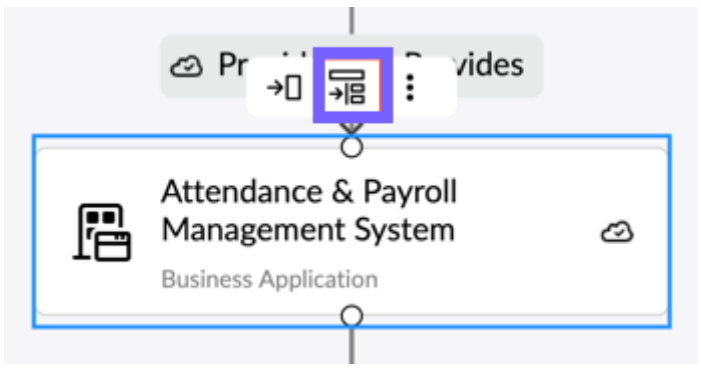


- **Open side panel**: Select a shape in the diagram to see this option. Use this option to open the selected object details in a side panel. If the shape is connected to an existing ServiceNow element, the details are fetched from the database and shown in the side panel. Update the details as required.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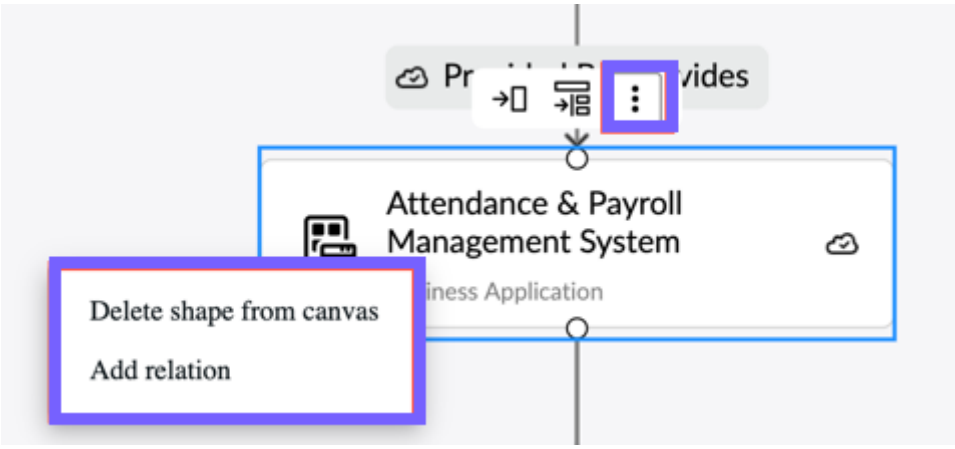

- **Delete shape from canvas** to remove the selected shape from the canvas.
- **Add relation** to add relationships with reference to the selected object.

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 menu using the keyboard to open the side panel, view related records, add or edit relationship text, and perform actions such as 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

You can use the Enterprise Architecture shapes to model current and future-state architectures in Enterprise Architecture Workspace.

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.

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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

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 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.

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.

To change the type of relationship between two ArchiMate shapes, select the connector between them and use the **Relationship type** drop-down that appears on the connector. For the full list of relationship types and their visual styles, see Shape connector properties in 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 when connecting shapes in a diagram.

ArchiMate- Implementation and Migration

Shape	Name
	Implementation Event
	Gap
	Work Package
	Deliverable

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ArchiMate- Implementation and Migration (continued)

Shape	Name
	Plateau
	Location
	Group

ArchiMate- Relationship Type

Shape	Name
	And Junction
	Or Junction

ArchiMate- Business layer

Shape	Name
	Business Actor
	Business Collaboration
	Business Event
	Business Function

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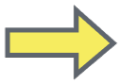
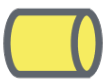
ArchiMate- Business layer (continued)

Shape	Name
	Business Interaction
	Business Interface
	Business Object
	Business Process
	Business Role
	Business Service
	Contract
	Product
	Representation

ArchiMate- Application layer

Shape	Name
	Application Collaboration

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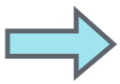
ArchiMate- Application layer (continued)

Shape	Name
	Application Component
	Application Event
	Application Function
	Application Interaction
	Application Interface
	Application Process
	Application Service
	Data Object

ArchiMate- Motivation

Shape	Name
	Assessment
	Constraint

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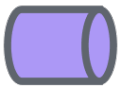
ArchiMate- Motivation (continued)

Shape	Name
	Driver
	Goal
	Meaning
	Outcome
	Principle
	Requirement
	Stakeholder
	Value

ArchiMate- Physical

Shape	Name
	Equipment
	Facility

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ArchiMate- Physical (continued)

Shape	Name
	Material

ArchiMate- Strategy

Shape	Name
	Capability
	Course of Action
	Resource
	Value Stream

ArchiMate- Technology

Shape	Name
	Artifact
	Communication Network
	Path
	Device

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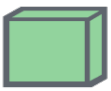
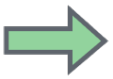
ArchiMate- Technology (continued)

Shape	Name
	Technology Function
	Technology Interface
	Technology Service
	Node
	System Software
	Technology Collaboration
	Technology Event
	Technology Interaction
	Technology Process

Related topics

- Shape connector properties in Enterprise Modeling and Visualization
- Working with ArchiMate Shapes
- Create a 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.

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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	Description
	Pool	Represents a swimlane container for a single participant or system in a process. Defines the boundary of a process and organizes the lanes that represent roles or responsibilities within it.
	Lane	Represents a subdivision within a pool, used to assign activities to specific roles, departments, or systems. Organizes responsibilities visually within the parent process boundary.

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.

BPMN-Event

Shape	Name	Description
	Start (Compensation)	Represents a process triggered to perform compensation for a previously completed activity. Used within event subprocesses to initiate rollback or corrective actions when a transaction requires undoing completed work.
	Start (Error)	Represents a process triggered by an error event, used exclusively within event subprocesses. Interrupts the parent process and redirects flow to error-handling logic when the specified error is thrown.
	Start (Escalation)	Represents a process triggered by an escalation signal, used within event subprocesses. Models escalation-driven initiation when an activity or process requires higher-level attention or intervention.

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BPMN-Event (continued)

Shape	Name	Description
	Start Interrupting Conditional	Represents an interrupting start event that activates when a specified business condition or data state becomes true. Interrupts the parent process and redirects flow to the event subprocess when the condition is met.
	Start Interrupting Message	Represents an interrupting start event activated by an incoming message. Interrupts the parent process and redirects flow to the event subprocess upon receiving the specified message.
	Start Interrupting Signal	Represents an interrupting start event activated by a broadcast signal. Interrupts the parent process and redirects flow to the event subprocess when the specified signal is received.
	Start Interrupting Timer	Represents an interrupting start event activated at a specific time or after a defined interval. Interrupts the parent process and redirects flow to the event subprocess when the timer triggers.
	Start (Multiple)	Represents a start event that activates when any one of several defined trigger types is received. The process begins when any single defined trigger condition is satisfied.
	Start (Non-Interrupting Condition)	Represents a non-interrupting start event activated when a specified condition becomes true. Spawns a concurrent event subprocess without interrupting the parent process flow.
	Start (Non-Interrupting Escalation)	Represents a non-interrupting start event activated by an escalation signal. Spawns a concurrent event subprocess to handle escalation without interrupting the parent process.
	Start (Non-Interrupting Message)	Represents a non-interrupting start event activated by an incoming message. Spawns a concurrent event subprocess without interrupting the parent process flow.
	Start (Non-Interrupting Multiple)	Represents a non-interrupting start event activated by any one of several defined trigger types. Spawns a concurrent event subprocess when any single trigger condition is met.
	Start (Non-Interrupting Parallel Multiple)	Represents a non-interrupting start event activated when all defined trigger types occur simultaneously. Spawns a concurrent event subprocess only when every trigger condition is satisfied.
	Start (Non-Interrupting Signal)	Represents a non-interrupting start event activated by a broadcast signal. Spawns a concurrent event subprocess to handle the signal without interrupting the parent process.

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BPMN-Event (continued)

Shape	Name	Description
	Start (Non-Interrupting Timer)	Represents a non-interrupting start event activated at a specific time or after a defined interval. Spawns a concurrent event subprocess without interrupting the parent process flow.
	Start (None)	Represents the starting point of a process with no defined trigger. Indicates that the process begins when initiated manually or by an external condition not captured in the model.
	Start (Parallel Multiple)	Represents a start event that initiates only when all defined trigger types occur simultaneously. Every specified trigger must be satisfied before the process begins.
	Intermediate (Catch-Cancel)	Represents an intermediate catch event that captures a cancel event within a transaction subprocess. Redirects process flow to cancellation handling and triggers compensation for completed activities within the transaction.
	Intermediate (Catch-Compensation)	Represents an intermediate catch event that captures a compensation event. Redirects flow to the compensation handler to perform rollback or corrective actions for a previously completed activity.
	Intermediate (Catch-Conditional)	Represents an intermediate catch event that pauses process flow until a specified business condition or data state becomes true. Resumes execution when the defined condition is satisfied.
	Intermediate (Catch-Error)	Represents an intermediate catch event that captures a specific error thrown within the process. Redirects flow to recovery or exception-handling paths when the specified error is received.
	Intermediate (Catch-Escalation)	Represents an intermediate catch event that captures an escalation signal. Redirects process flow to an escalation handler when higher-level attention is required.
	Intermediate (Catch-Message)	Represents an intermediate catch event that pauses process flow until a specific message is received from a participant or system. Resumes execution once the expected message arrives.
	Intermediate (Catch-Multiple)	Represents an intermediate catch event that resumes process flow when any one of several defined trigger types occurs. The first trigger condition to be met is sufficient to continue.
	Intermediate (Catch-Non-Interrupting Condition)	Represents a non-interrupting boundary conditional event that fires when a specified condition is true while an activity is active. Spawns a concurrent flow without interrupting the activity.

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BPMN-Event (continued)

Shape	Name	Description
	Intermediate (Catch-Non-Interrupting Escalation)	Represents a non-interrupting boundary escalation event that fires while an activity is active. Spawns a concurrent escalation handler without interrupting or canceling the activity.
	Intermediate (Catch-Non-Interrupting Message)	Represents a non-interrupting boundary message event that fires when a message arrives while an activity is active. Spawns a concurrent flow without canceling the activity.
	Intermediate (Catch-Non-Interrupting Multiple)	Represents a non-interrupting boundary event triggered by any defined event type while an activity is active. Spawns a concurrent flow when any single trigger condition is met.
	Intermediate (Catch-Non-Interrupting Parallel Multiple)	Represents a non-interrupting boundary event triggered only when all defined event types occur simultaneously while an activity is active. Spawns a concurrent flow when every condition is satisfied.
	Intermediate (Catch-Non-Interrupting Signal)	Represents a non-interrupting boundary signal event that fires when a signal arrives while an activity is active. Spawns a concurrent flow without canceling the activity.
	Intermediate (Catch-Non-Interrupting Timer)	Represents a non-interrupting boundary timer event that fires at a specific time or interval while an activity is active. Spawns a concurrent flow without interrupting or canceling the activity.
	Intermediate (Catch-Parallel Multiple)	Represents an intermediate catch event that pauses process flow until all defined trigger types occur simultaneously. Resumes execution only when every specified trigger condition is satisfied.
	Intermediate (Catch-Signal)	Represents an intermediate catch event that pauses process flow until a specific broadcast signal is received. Resumes execution when the designated signal arrives from another process or participant.
	Intermediate (Catch-Timer)	Represents an intermediate catch event that pauses process flow until a specific time or interval elapses. Models time-based delays, deadlines, and scheduled waits within a process.
	Intermediate (Link-Catch)	Represents a link catch event that receives process flow from a corresponding link throw event within the same process. Simplifies diagrams by replacing long or crossing sequence flow lines.
	Intermediate (None)	Represents a marker in the process flow with no associated trigger or result. Used to document significant milestones or states within a process that are meaningful to stakeholders but do not affect routing.

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BPMN-Event (continued)

Shape	Name	Description
	Intermediate (Throw-Compensation)	Represents an intermediate throw event that triggers compensation for one or more previously completed activities. Initiates rollback or corrective actions within transactional process flows.
	Intermediate (Throw-Escalation)	Represents an intermediate throw event that raises an escalation signal to a higher-level handler or event subprocess. Models escalation initiation when standard process flow requires intervention at a broader scope.
	Intermediate (Throw-Link)	Represents a link throw event that transfers process flow to a corresponding link catch event within the same process. Used to simplify complex diagrams by replacing long or crossing sequence flow lines.
	Intermediate (Throw-Message)	Represents an intermediate throw event that sends a message to a participant or external system. Models outbound message transmission as a defined step within the process flow.
	Intermediate (Throw-Multiple)	Represents an intermediate throw event that simultaneously triggers all defined outgoing events. Models multi-event broadcasting from a single point in the process flow.
	Intermediate (Throw-Signal)	Represents an intermediate throw event that broadcasts a signal to one or more listening processes or events. Models signal-based communication within or across process flows.
	Cancellation End	Represents an end event that cancels a transaction subprocess. Triggers compensation for all completed activities within the transaction scope and terminates the transaction flow.
	Compensation End	Represents an end event that triggers compensation for previously completed activities as the final process action. Models rollback as the terminal outcome of a transactional flow.
	End (Link)	Represents an end event that transfers flow to a corresponding link event. Used to simplify diagrams by connecting distant parts of a process without long sequence flow lines.
	End (None)	Represents the completion of a process path with no specific result or outgoing action. Indicates that the current flow terminates without triggering further events, messages, or signals.
	End Error	Represents an end event that terminates a process path by throwing a specific error. The error propagates to an enclosing process or boundary handler for exception-based process termination.

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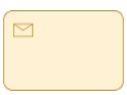
BPMN-Event (continued)

Shape	Name	Description
	End Message	Represents an end event that sends a message to a participant or external system as the final action of a process path. Models outbound notification as the terminal outcome of a process flow.
	End Signal	Represents an end event that broadcasts a signal to one or more listening processes as the final process action. Models signal-based notification as the terminal outcome of a process flow.
	End Terminate	Represents an end event that immediately terminates all active process instances and parallel flows. Stops the entire process upon reaching this point, regardless of other paths that may still be active.
	Escalation End	Represents an end event that raises an escalation signal to a higher-level handler. Models escalation as the final outcome of a process flow requiring intervention at a broader scope.
	Multiple End	Represents an end event that simultaneously triggers all defined result events. Models multi-result termination where multiple end behaviors occur from a single endpoint.

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	Description
	Business Rule Task	Represents a task that evaluates a set of business rules to produce a result or decision. Models rule-engine-driven activities such as eligibility checks, policy evaluations, or dynamic calculations.
	Manual Task	Represents a task performed entirely by a human participant without any system or application support. Models unassisted manual activities such as physical document handling or fieldwork that occurs outside the process system.
	Receive Task	Represents a task that waits for a message from an external participant or system before the process can continue. Models inbound message reception as an explicit activity within the process flow.
	Script Task	Represents a task executed automatically by the process engine using a defined script or expression. Models lightweight automation tasks embedded directly in the process flow, such as data transformations or calculations.

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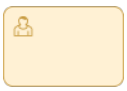
BPMN-Activity: Task (continued)

Shape	Name	Description
	Send Task	Represents a task that sends a message to an external participant or system. Models outbound message transmission as an explicit step where the act of sending is meaningful within the process flow.
	Service Task	Represents a task performed automatically by a system, service, or application without human intervention. Models automated activities such as API calls, system integrations, or background data processing.
	Task	Represents a unit of work within a process performed by a participant or system. Models atomic activities not decomposed further in the current diagram when the task type is unspecified or not relevant to the model.
	User Task	Represents a task performed by a human participant with the assistance of a software application or workflow tool. Models human-in-the-loop activities such as form completion, approvals, and data entry.

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	Description
	Complex	Represents a decision or synchronization point with complex activation conditions not expressible by standard gateway types. Models advanced branching or merging logic that requires custom rules defined in the gateway condition expression.
	Default	Represents the default sequence flow from an exclusive or inclusive gateway when no other defined condition is met. Ensures that the process always has a path to follow when all conditional flows evaluate to false.
	Event	Represents an event-based gateway that routes process flow based on which event occurs first among defined alternatives. Models reactive branching where the next step is determined by incoming events rather than data conditions.
	Event Based (Start)	Represents an instantiating event-based gateway that creates a new process instance when the first of several defined events occurs. Models exclusive event-driven process instantiation without requiring a preceding start event.
	Exclusive	Represents a decision point where exactly one outgoing sequence flow is followed based on evaluated conditions. Models branching logic where only a single path is taken, and merges the first arriving token on convergence.

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BPMN-Gateway: Core (continued)

Shape	Name	Description
	Inclusive	Represents a decision point where one or more outgoing sequence flows are followed based on conditions. Models branching logic where multiple paths can be activated simultaneously and synchronizes all active paths on merge.
	Parallel	Represents a forking or synchronization point where all outgoing sequence flows are activated simultaneously. Models parallel execution of multiple process paths and waits for all tokens to arrive before continuing on merge.

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 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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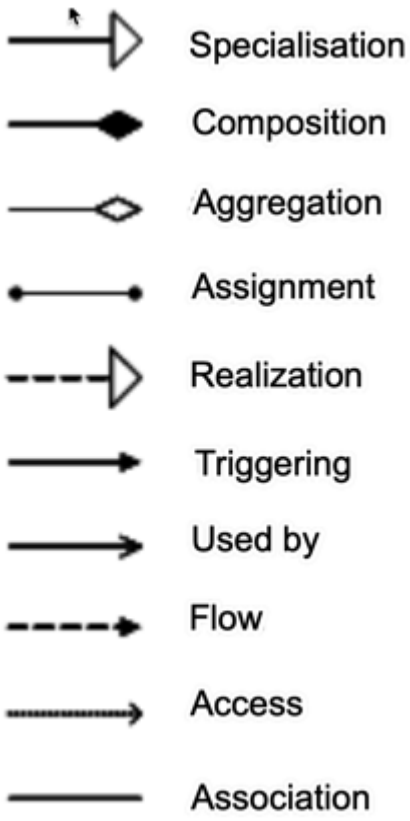

Related topics

- ArchiMate shapes
- Create a diagram using ArchiMate shapes and add relationships

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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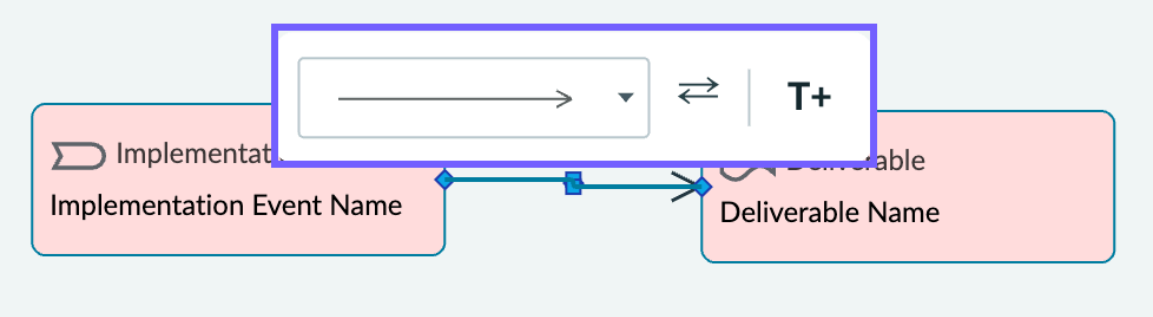
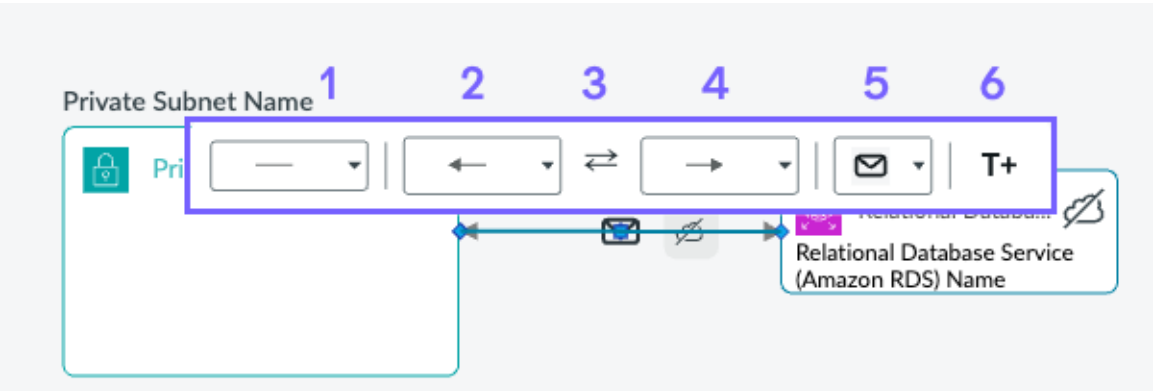


The **Relationship type** drop-down provides the standard ArchiMate 3.2 relationship types, including Access, Aggregation, Assignment, Association, Composition, Flow, Influence, Realization, Serving, Specialization, Triggering, and Used by.

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

When 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:



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.

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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

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
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

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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 delivering business value	Customer Onboarding Value Stream
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

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Enterprise Architecture Shapes mapping to CSDM Domain, Purpose, and Example (continued)

Shape	Domain	Purpose	Example
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 measurable business value	Employee Onboarding Service
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

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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
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

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Add a shape library element for a custom shape

Custom shapes example

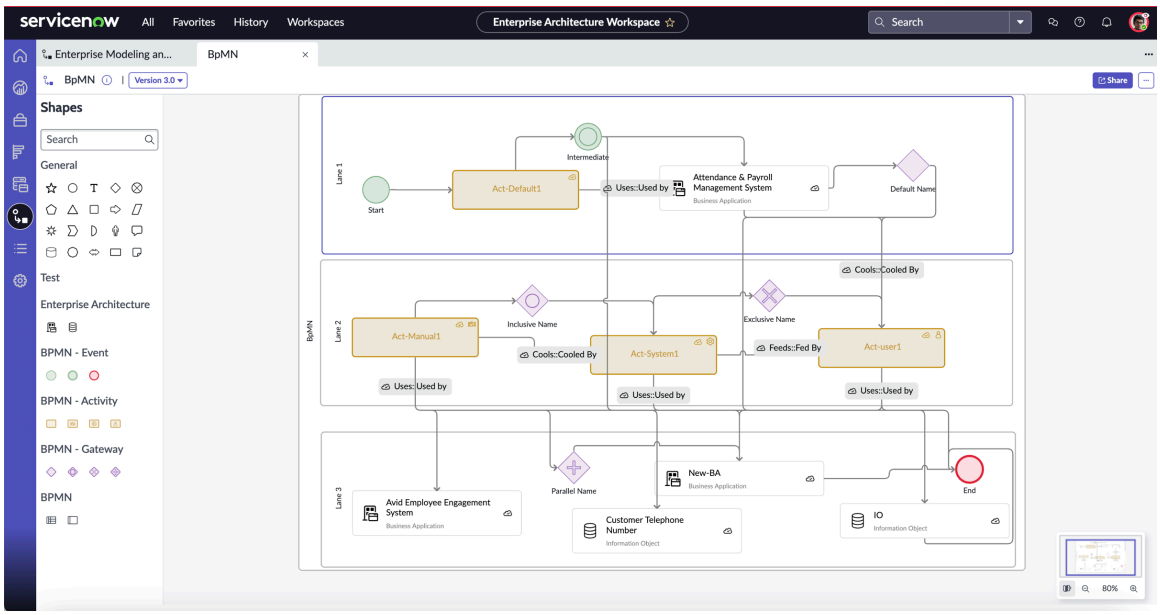
Business process modeling

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 provides a clear and understandable depiction of how a business process operates. It helps to have a common understanding of the processes, identify areas for process optimization or streamlining the processes.

Elements that are included in a business process modeling diagram:

- 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 the start, intermediate, and end points of a process. Common symbols used are circles.
- Activities: Tasks or actions within the process. 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

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.

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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).

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 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. You can use these product capabilities to outline the specific technical capabilities that the business application or TRM product provides.

While business capabilities describe what the organization needs, product capabilities describe how those needs are met through business applications or TRM products.

Example: Product capability

An attendance and payroll management business application is used to manage employee attendance, leave, and payroll processing. For this business application, some product capabilities can be:

- Payroll calculation: Computes salary based on attendance, leaves taken, and tax laws
- Compliance reporting: Generates reports for tax and labor lax compliance.

Related topics

Working with product capabilities

View product capabilities associated with a business application

Create a product capability and associate it 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 associated with a Technology Reference Model product

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Open a Configurable Workspace experience task conkeyrefs

Access your Configurable Workspace experience in UI Builder for editing.

Before you begin

Role required: ui_builder_admin or admin

Procedure

1. Navigate to **All** > **Now Experience Framework** > **UI Builder**.
2. Select your experience.
3. Select **Experiences**.

Result

Your Configurable Workspace 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 supervisor and auditor to view the overall audit timeline and status, track budget and resources for engagements, trace high priority observations and issues, and 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.

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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.

DEX Application & Device Health

DEX Application & Device Health is a centralized workspace, dedicated to monitoring the performance, security, and compliance of the digital workplace.

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.

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.

Vendor Management Workspace

Monitor the performance of your company's vendors and manage all vendor-related information using the Vendor Management Workspace. Assess the performance of your vendors using key performance indicators (KPIs) that you can configure to create vendor metrics.

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.

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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.

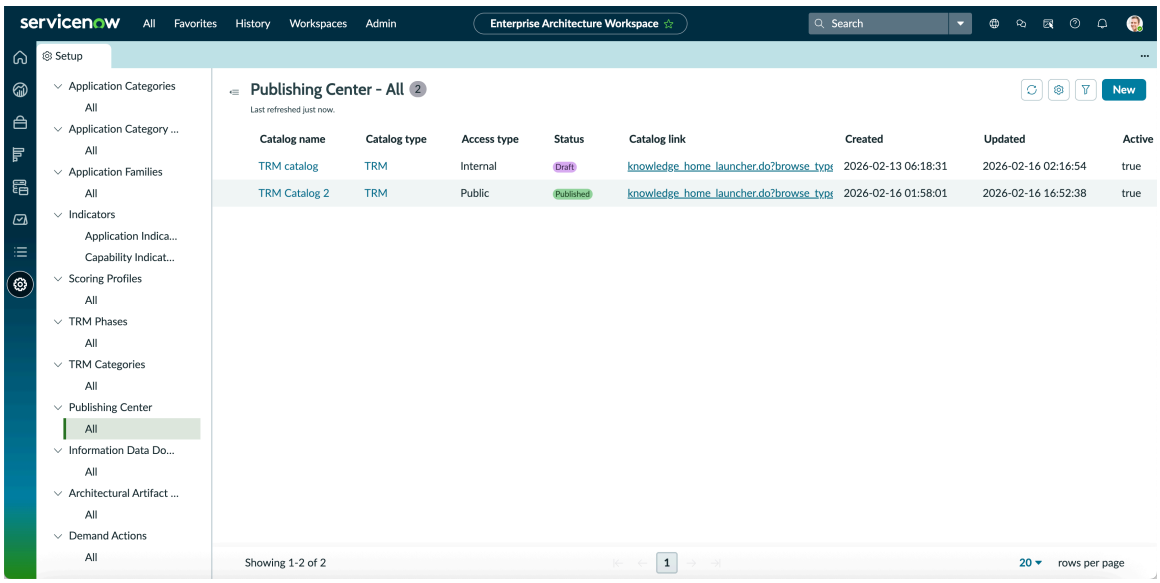
Understanding the terminology used in Publishing Center:

- 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:

- 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.

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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

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.

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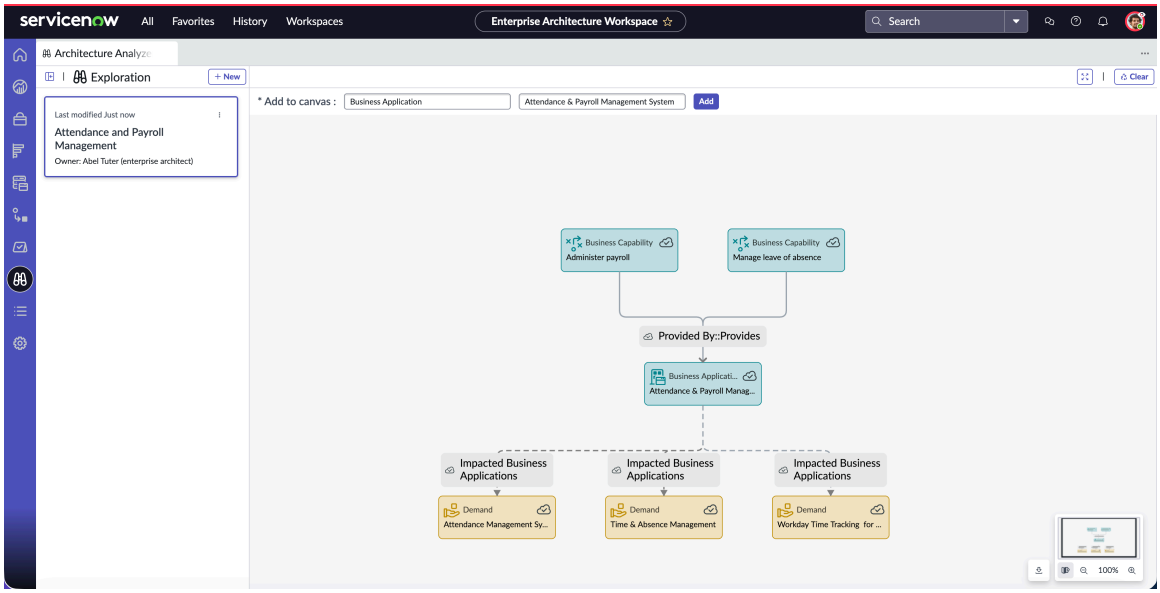


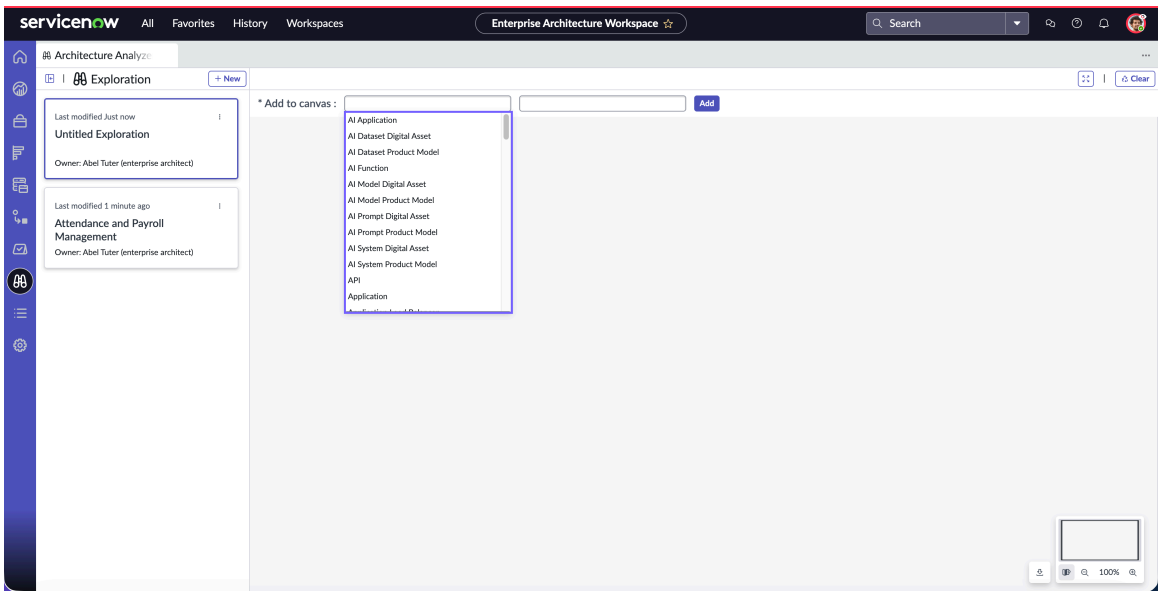
The Architecture Analyzer is a lightweight exploration tool for rapid, on demand analysis. You can use it when you want to quickly analyze entity relationships and understand dependencies without the overhead of maintaining a versioned diagram.

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

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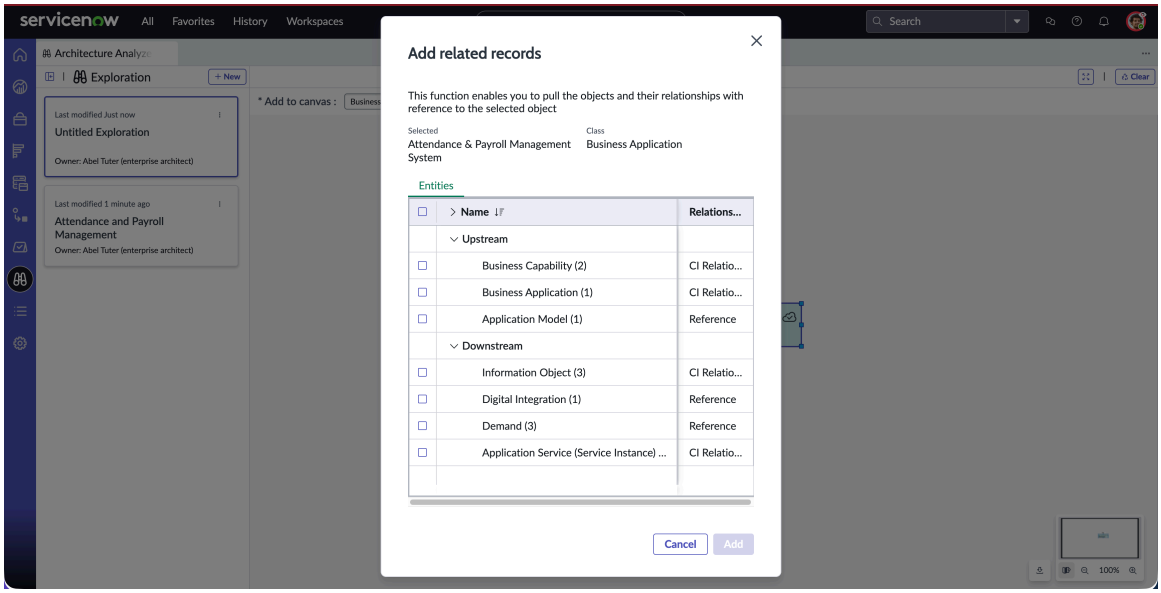

- Tweak the canvas display according to your requirement by performing the following:
  - To hide the left navigation pane and the **Add to canvas** boxes, select the toggle full-screen icon ( )
  - To hide just the left navigation pane, select the toggle sidebar icon ( )
  - To clear all entities from 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:

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- 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

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, and release compatibility.
- Ensure you have activated the Enterprise Architecture plugin (com.snc.apm).
- For enabling the technology portfolio management information in the Enterprise Architecture Workspace:
  - Ensure you have activated the Software Asset Management Foundation plugin (com.snc.sams).
  - Ensure you have installed the Technology Portfolio Management (sn_apm_tpm) store app.

Role required: admin

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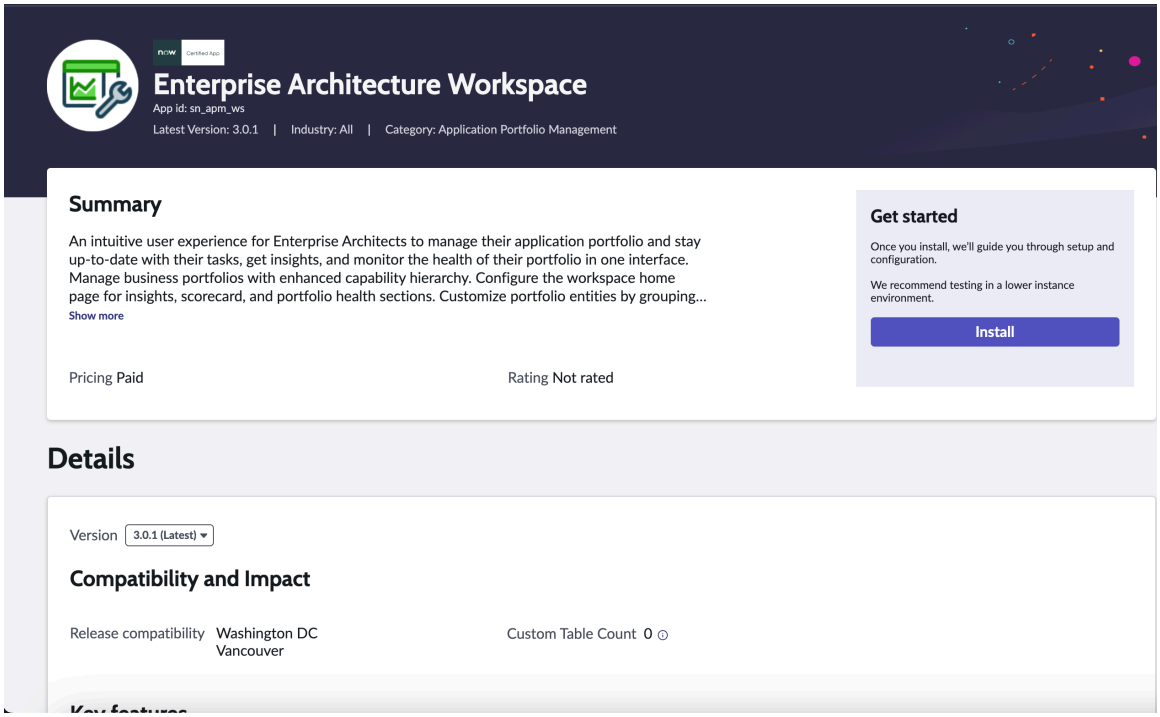

Procedure

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 website 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.
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**.

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.

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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, 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, 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

Users with Enterprise Architecture Workspace roles and certain platform roles, such as ITIL and other CMDB related roles, may be able to create or edit Business Application records by default.

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**.

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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 • 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

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Capabilities requiring Enterprise Architect group membership (continued)

Functional area	Role also required	Capabilities unlocked by group membership
		Note: sp_admin is required in addition to sn_apm.apm_admin and knowledge_admin for EA group members accessing the Publishing Center.
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	sn_apm.apm_app	sn_apm.apm_user	sn_apm.apm_admin	sn_apm.apm_read	sn_apm.apm_	Notes
Activate the EA Workspace plugin	✓						
Activate the Technology Portfolio Management (TPM) plugin	✓						
Activate the Technology Reference Model (TRM) plugin	✓						
Activate the Read only roles for Enterprise Architecture plugin	✓						

Setup page

The Setup page provides configuration options for all functional areas in the workspace.

Capability	admin	sn_apm.apm_app	sn_apm.apm_user	sn_apm.apm_admin	sn_apm.apm_read	sn_apm.apm_	Notes
Configure application categories, category groups, and families	✓	✓					
Configure application and capability indicators	✓	✓					

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Capability	admin	sn_apm.apm_admin	sn_apm.apm_user	sn_apm.apm_viewer	sn_apm.apm_read	Notes
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.

Capability	admin	sn_apm.apm_admin	sn_apm.apm_user	sn_apm.apm_viewer	sn_apm.apm_read	Notes
Add and edit business capabilities and sub-capabilities	✓	✓	✓	✓		
Add and edit business units	✓	✓	✓	✓		

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Capability	admin	apm.app	apm.app	apm_apm	apm.app	apm.apm_	Notes
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.app	apm_apm	apm.app	apm.apm_	Notes
Add new business applications	✓	✓	✓				
Add and edit digital integrations; associate artifacts and information objects with digital integrations	✓	✓	✓				
Add and edit digital interfaces; manage Agile Development components,	✓	✓	✓				

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Capability	admin	apm.app_map	apm.app_mgr	apm.app_owner	apm.apm_user	Notes
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).

Capability	admin	apm.app_map	apm.app_mgr	apm.app_owner	apm.apm_user	Notes
Add and edit data domains and information objects	✓	✓	✓	✓		

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Capability	admin	apm.app	apm.app	apm.app	apm.apm_	Notes
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.apm_	Notes
Activate the TPM plugin	✓					
Update the system property to gather software from CMDB	✓					
Update TPM lifecycle data for a business application or application service	✓	✓	✓	✓		

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Capability	admin	apm.app	apm.apm_	apm.apm_	apm.apm_	Notes
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.apm_	apm.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
View and update pending TRM requests	✓	✓	✓			Must be in the Enterprise Architect group
View all TRM products, grouped by category or individually	✓	✓	✓	✓		

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Capability	admin	apm.app	apm.app	apm_apm	apm.app	apm.apm_	Notes
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	✓	✓	✓	✓	✓		
Run the scheduled job to sync TRM product names with linked SAM software product names	✓						Requires the admin role. Run on demand from **All** > **System Definition** > **Scheduled Jobs**.

Enterprise modeling and visualization

Enterprise modeling and visualization lets users create, manage, and publish architecture diagrams.

Capability	admin	apm.app	apm.app	apm_apm	apm.app	apm.apm_	Notes
Approve or reject modeling diagram requests	✓	✓	✓				Must be in the Enterprise Architect group

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Capability	admin	apm.app	apm.app_	apm.app_	apm.apm_	Notes
View shape library configurations, entity configurations, modeling configuration, and relationship definitions	✓	✓	✓			Must be in the Enterprise Architect group
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	✓	✓	✓	✓		

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Capability	admin	apm.app_map	apm.app_sim	apm.app_rat	apm.apm_user	Notes
Set relationship type on a connector; set connector line style, arrowhead style, and icon for non-ArchiMate and mixed connectors; swap connector direction; add a label to a connector	✓	✓	✓	✓		Requires Owner or 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_map	apm.app_sim	apm.app_rat	apm.apm_user	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	✓	✓	✓	✓		

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Capability	admin	sn_apm.apm_admin	sn_apm.apm_analyst	sn_apm.apm_manager	sn_apm.apm_user	Notes
Apply filters on the application rationalization view	✓	✓	✓	✓		
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

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Capability	admin	apm.app	apm.app	apm.app	sn_apm.sn	apm.app	apm.apm_	Notes
								certification task
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.app	sn_apm.sn	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.app	sn_apm.sn	apm.app	apm.apm_	Notes
Activate the App TCO plugin	✓							
Create TCO sources, TCO source cost types, and TCO cost types	✓							

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Capability	admin	sn_apm.apm_admin	sn_apm.apm_user	sn_apm.apm_read	sn_apm.apm_	Notes
Set properties for TCO dashboards	✓					
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_user	sn_apm.apm_read	sn_apm.apm_	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_map_admin	apm.app_map_user	apm.app_map_viewer	apm.portfolio_viewer	apm.apm_user	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_map_admin	apm.app_map_user	apm.app_map_viewer	apm.portfolio_viewer	apm.apm_user	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_map_admin	apm.app_map_user	apm.app_map_viewer	apm.portfolio_viewer	apm.apm_user	Notes
View the AI systems tab on a business application record	✓	✓	✓	✓			

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Capability	admin	apm.app	apm.app	sn_apm.apm	sn_apm.apm	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.apm	sn_apm.apm	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_user	sn_apm.apm_manager	sn_apm.apm_stakeholder	sn_apm.apm_viewer	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

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.

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Table	Description
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 Portfolio 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.

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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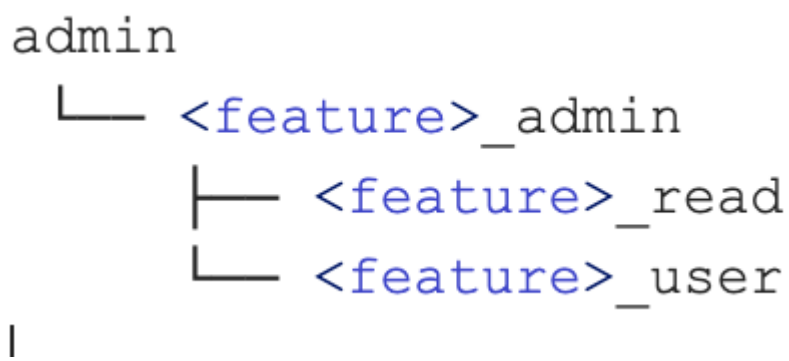
Standard role pattern



- `<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

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**.

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.

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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. **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

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Field	Description
	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"

   },

   "highlightedHeader":{

      "label":"Business Portfolio",

      "icon":"bag-outline"

   },
```

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```
   "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**.

Create and apply a configuration for 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

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.

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Field	Description
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
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
```

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```
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) {

        query = query +
 "^business_service.used_for=Production";

    }

    var productInventoryGR = new
 GlideAggregate('sn_apm_tpm_discovered_technology');

    productInventoryGR.addEncodedQuery(query);
```

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```
    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"),

            'buttonTooltip': gs.getMessage("View list for
hardware models with lifecycle risk"),

            'border': this.cardDetails[3].border,

            'highlightedHeader': this.cardDetails[3].header,

            'navigation': {

                "route": "list",
```

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```
                "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.

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.

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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.

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

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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**.
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

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.

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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**.

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

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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 **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:
   - **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

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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**.

Related topics

View all scoring profiles

Attach a profile indicator with an application 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.

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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 **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.

   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.

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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**.

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.

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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
- Manage the Technology Reference Model in Enterprise Architecture Workspace
- Working with Technology Reference Model (TRM) in EA Workspace

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

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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

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**.

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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**.
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

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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
- 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.

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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. 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.

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.

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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 the custom shapes to the shape library, you can define actions that you want to associate with each custom shape that you have created. Diagram actions can 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**.

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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**.

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

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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

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’.

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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 **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

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.

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- 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.

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**.

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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 duration of a 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

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**.

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Related topics

- Create a source for an Application TCO
- Set the duration of a 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 duration of a fiscal period property for TCO dashboards

Set the duration of a 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

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

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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

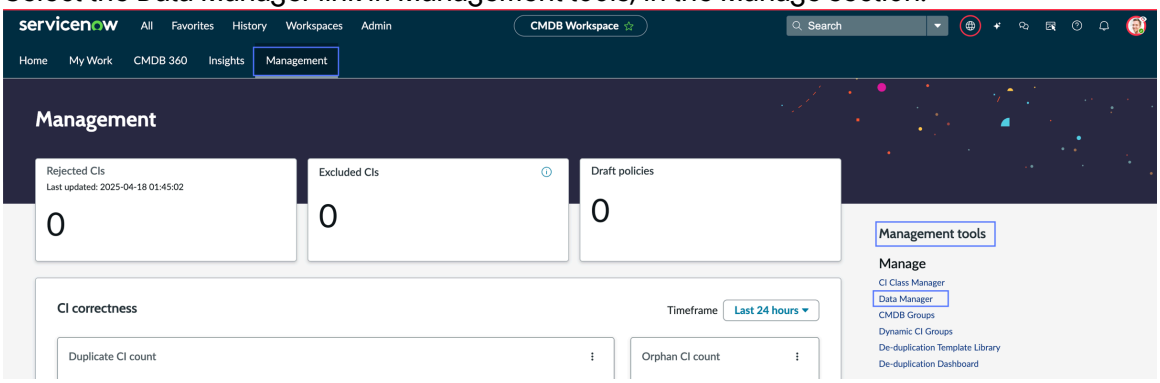
About this task

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).

5. In the Confirm import of certification schedule into draft policies, select **Import into draft policies**.

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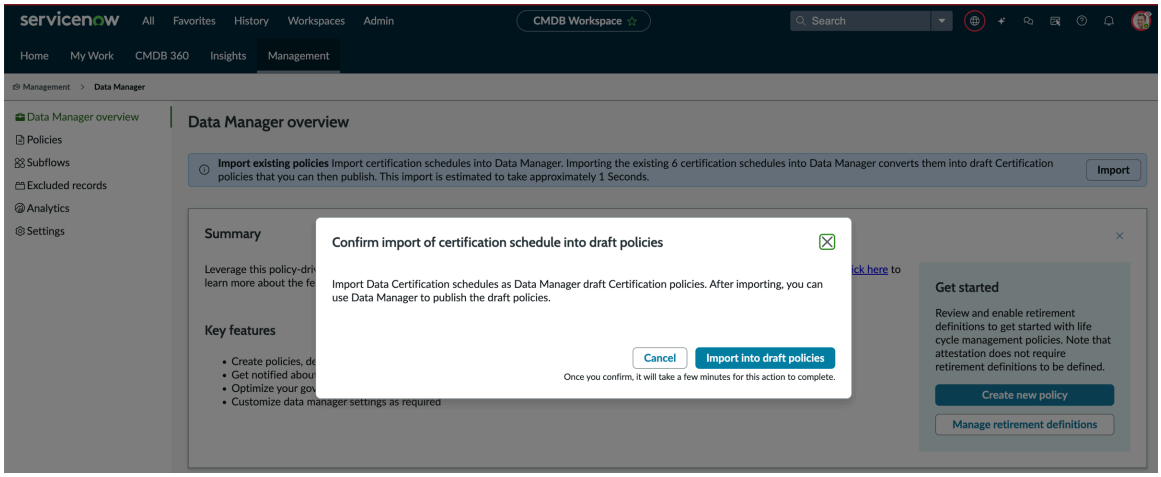
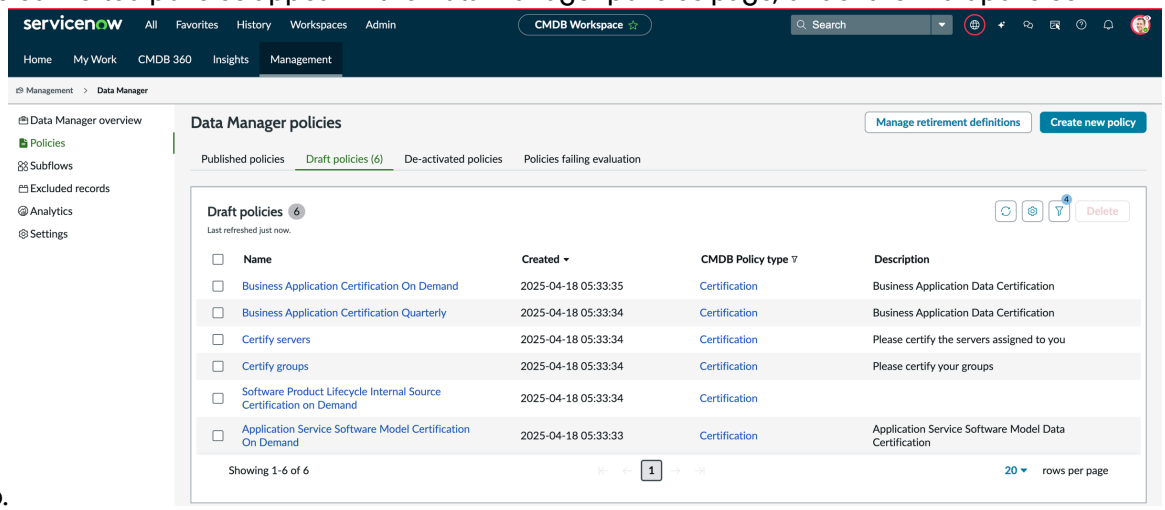


6. In the Import summary modal, select **View draft policies**.
   The converted policies appear in the Data Manager policies page, under the Draft policies tab.



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.

Procedure

1. Navigate to **All** > **Workspaces** > **CMDB Workspace**.
2. Select **Management** in the CMDB Workspace menu bar.

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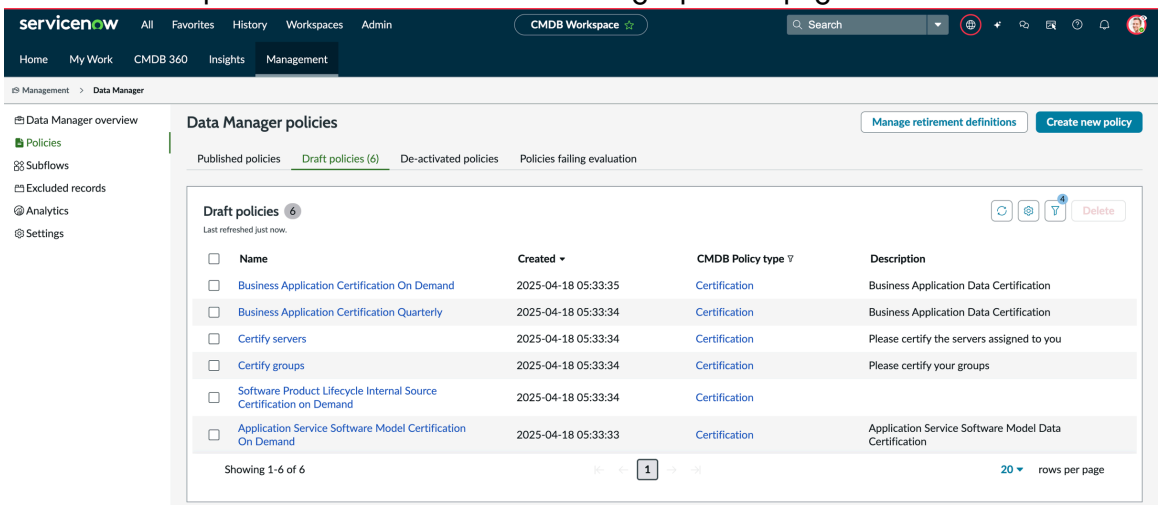
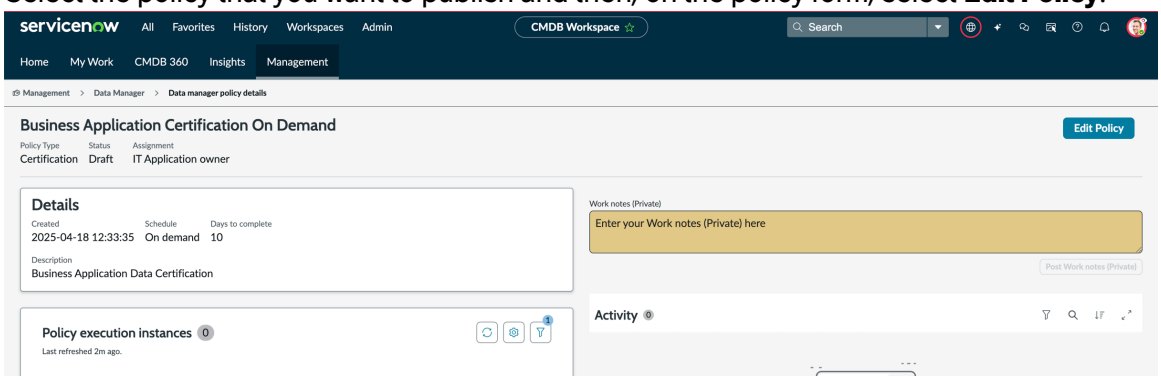
3. Select the Data Manager link in Management tools, in the Manage section.
4. Select Policies in the left-side bar in the Data Manager overview page.
5. Select the Draft policies list view on the Data Manager policies page.



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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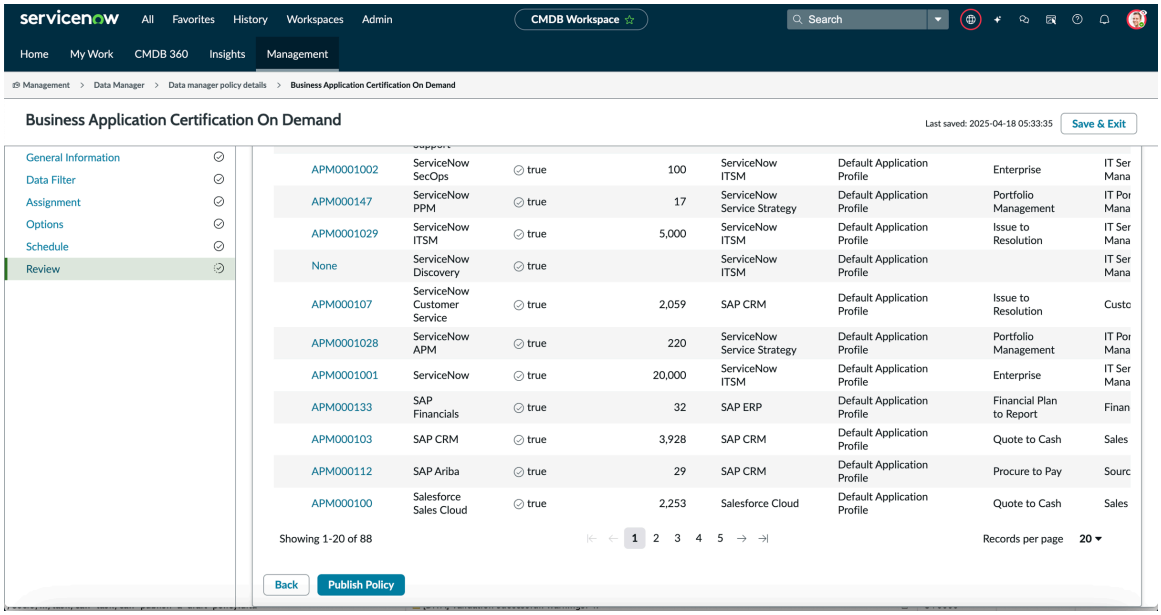

The CMDB Data Management Certification Policies (sn_cmdb_ws_dm_certification_policy) table gets populated with the list of published certification policies.

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 Portfolio Management in Enterprise Architecture Workspace. By configuring TPM, you can get application lifecycle risk insights and rationalize applications.

Related topics

Manage the Technology Portfolio Management (TPM) in Enterprise Architecture Workspace

Working with Technology Portfolio Management (TPM) in EA Workspace

Activate the Technology Portfolio Management (TPM) plugin

Activate the Technology Portfolio Management (TPM) 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 activate the application on a development or test instance.
5. Select **Install**.

Tables installed with TPM in the EA Workspace

Several types of tables are installed with Technology Portfolio Management.

The following tables are installed with the Technology Portfolio Management (TPM) plugin:

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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.
TPM Technology Lifecycle Exception [sn_apm_tpm_technology_lifecycle_exception]	Stores the life cycles 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.

Business rules for TPM in EA Workspace

Several types of business rules are added with Technology Portfolio Management.

The following business rules are added for Technology Portfolio Management (TPM) 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.

Scheduled jobs for TPM in the EA Workspace

Several types of scheduled jobs are added for Technology Portfolio Management.

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The following is the list of scheduled jobs for Technology Portfolio Management (TPM) in EA Workspace:

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.
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. **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.

Related topics

- Run a scheduled job to update TRM technical debt data in EA Workspace
- Schedule a job to generate TPM lifecycle data - Legacy
- Schedule a job to generate TPM technology risk - Legacy

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

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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**.

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.

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
- Manage the 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 requests for TRM product or TRM product lifecycle 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 a product request number to open it.
4. Select **Approve** or **Reject**.
   You can also edit the request details such as Requested TRM phase, Category, and Business Justification and select **Save**.

Result

The requester receives an email notification for the approval or rejection.

Related topics

View or update your TRM requests

Manage the Technology Reference Model in Enterprise Architecture Workspace

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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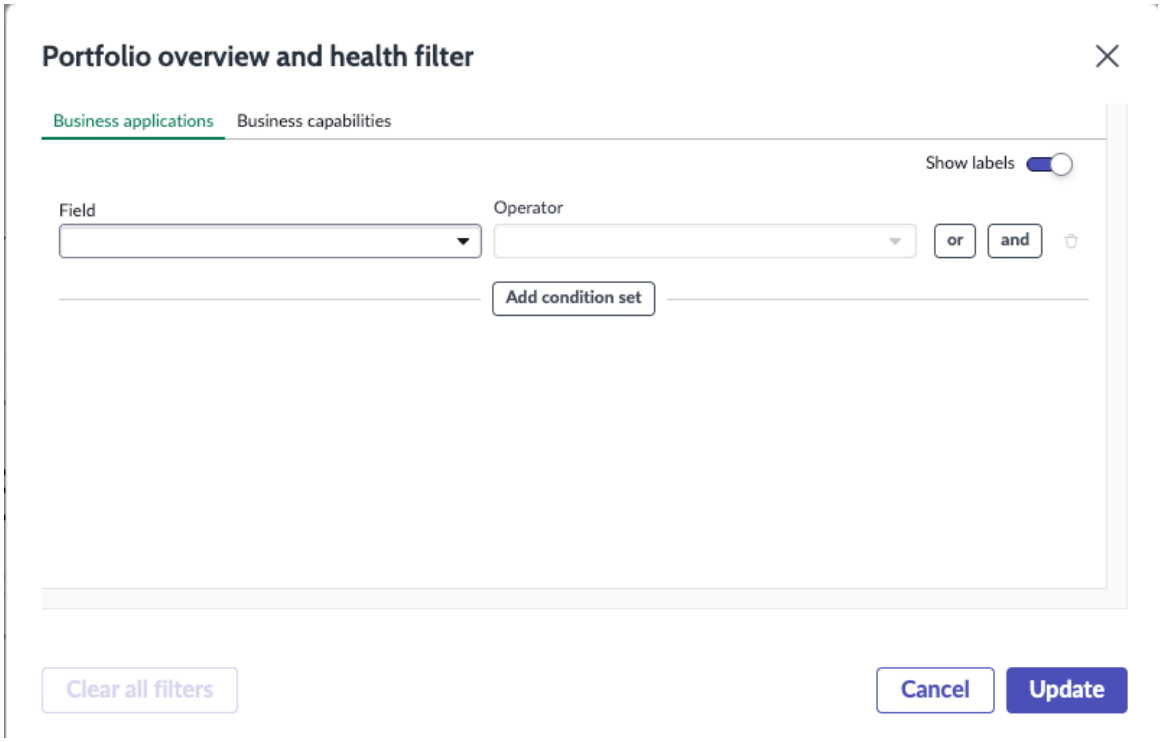
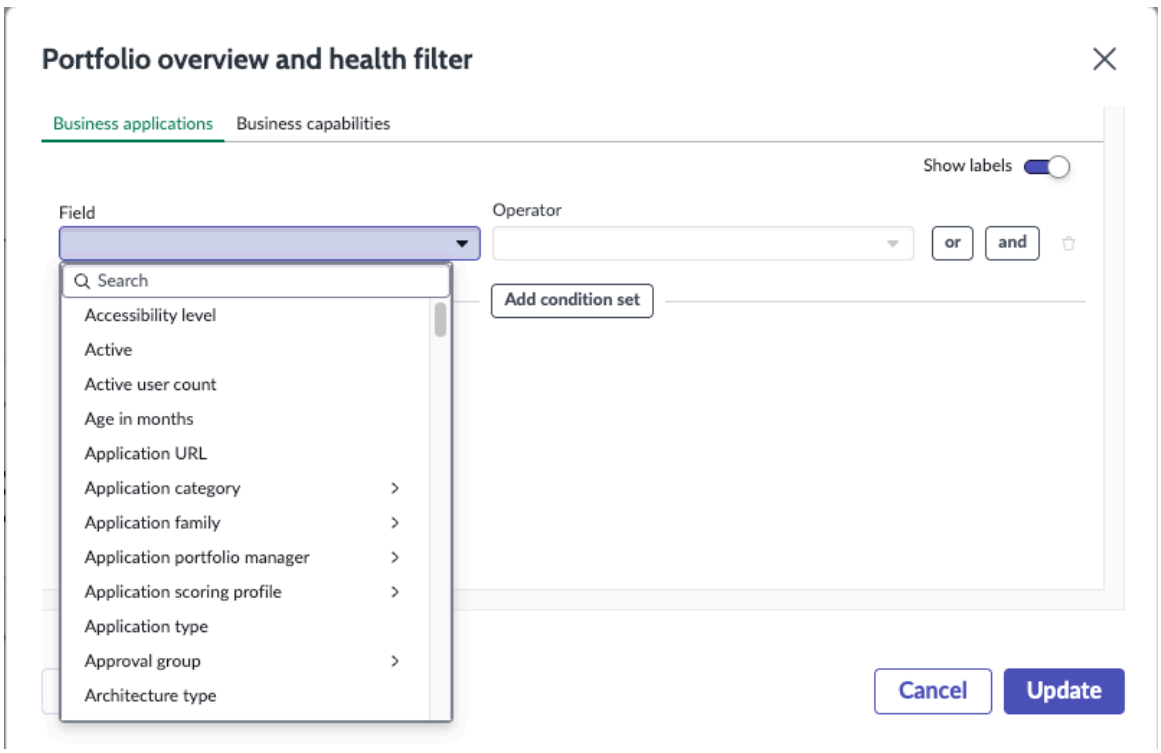


3. Depending on the data you want to filter for, select the **Business applications** or the **Business capabilities** tab.

   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 Overview

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

Exploring dashboards in Enterprise Architecture Workspace

View the performance of applications using the Application Assessments dashboard

Use the Application Assessments dashboard to view overview reports on the performance of the business applications.

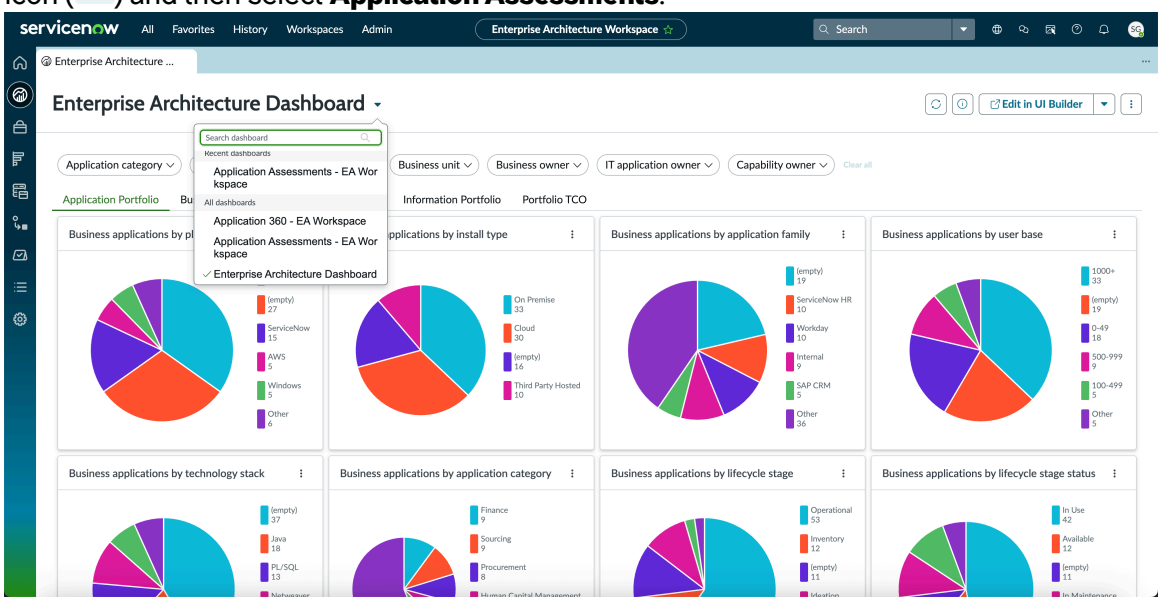
Before you begin

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**.



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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.

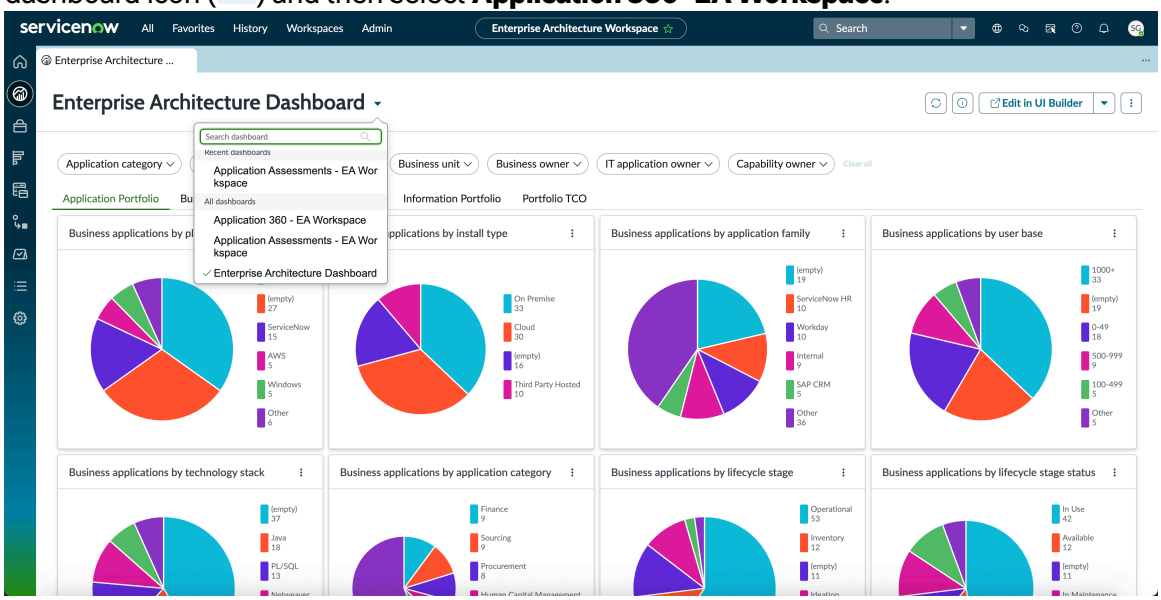
Before you begin

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.

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Related topics

Explore the Application 360 dashboard in Enterprise Architecture Workspace

View the performance of applications using the 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.

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 Business capability record 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.

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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 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.

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

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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 ( ).
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.
5. Select **Assign**.

Related topics

Unassign a business application from a capability

Update the hierarchy of a business capability

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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

Unassign a business application from a capability

You can unassign a business application from a 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 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

Delete a capability from the hierarchy

Delete a capability that you no longer require.

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 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

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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

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

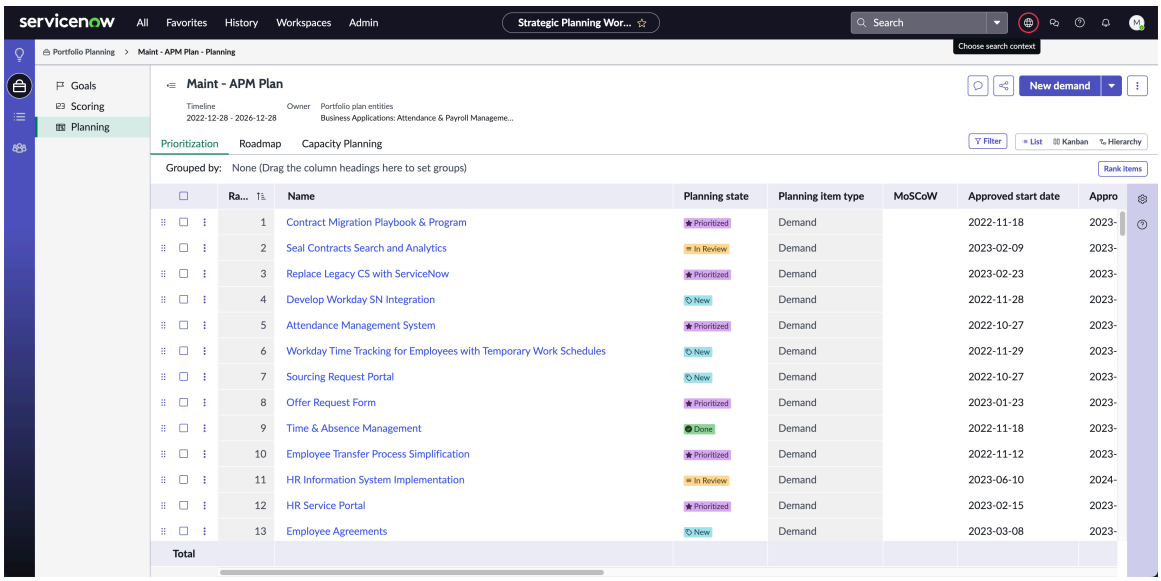
Ensure that the Strategic Planning plugin (com.sn_apw_advanced) (v4.0.2 or later) is installed.

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.

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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

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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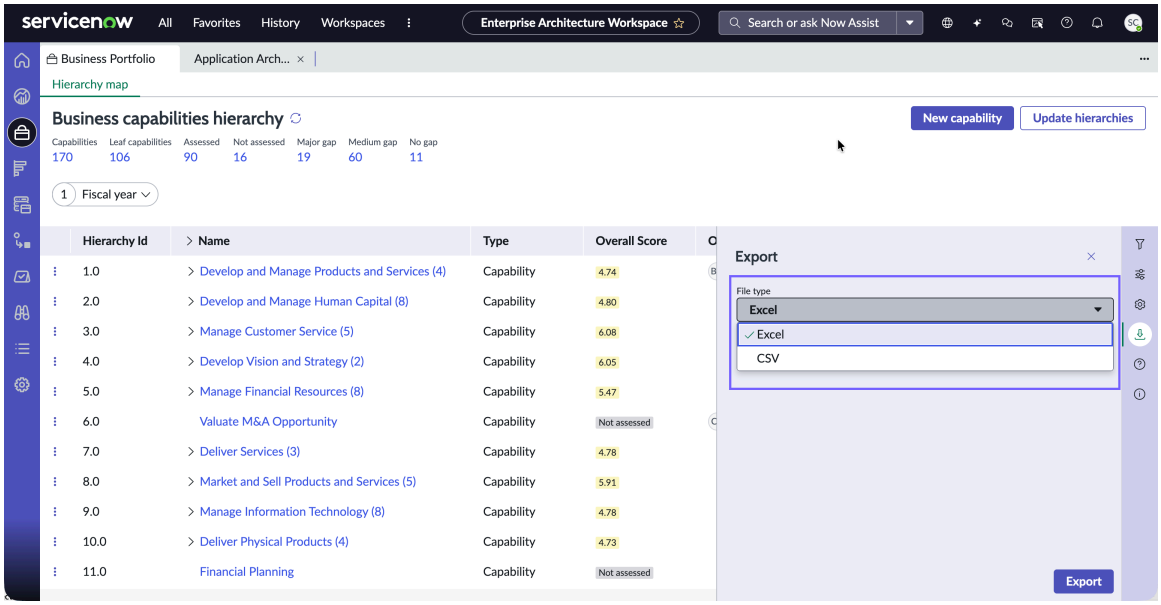

5. Select **Export**.

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.

Related topics

Rationalization of business applications

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.

Before you begin
Role required: sn_apm.apm_analyst

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About this task

You can narrow down the number of business applications that may be viewed, based on their application indicator scores.

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 Create or edit a bubble chart for application strategies - Legacy.
     - 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 with an application 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.

     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.

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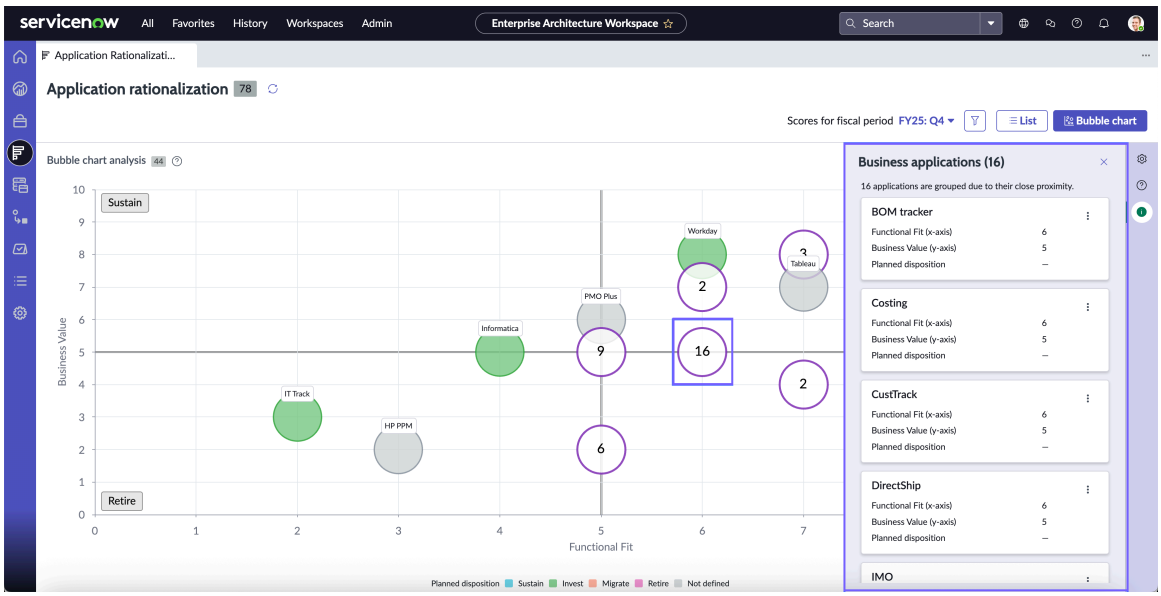
5. Select **Apply**.
   Business application bubbles are displayed on the bubble chart.

   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 the bubble chart
- Bubble chart view of application rationalization
- Apply filters on the Application Rationalization page

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**.
4. Select the bubble for the relevant application that you want to create a demand for perform the following.

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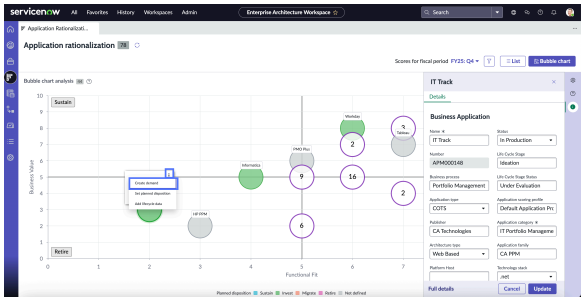
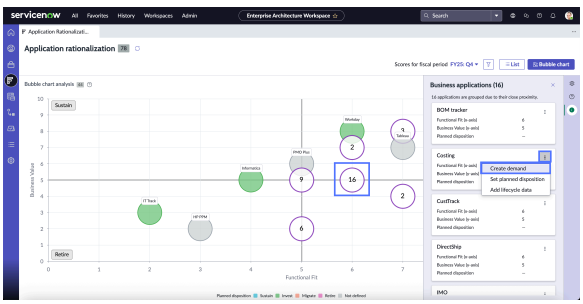
Bubble type	Action
Single bubble	**a.** Select a single bubble. **b.** In the pop-up window, select the context menu icon (⋮) and select **Create demand**. 
Grouped bubble	**a.** Select a grouped bubble. The info pane appears, displaying the list of individual business applications that are part of the 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 the 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

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.

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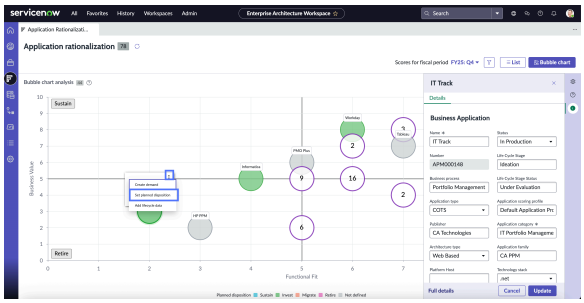
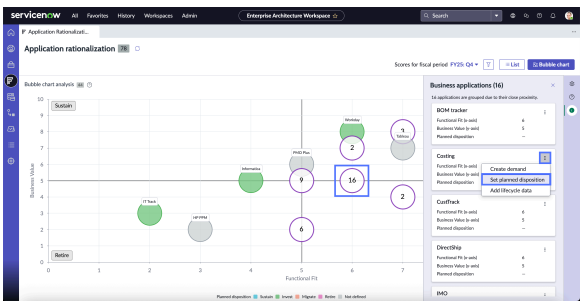
Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Application Rationalization page by selecting the application rationalization icon ( ).
3. Select **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 the bubble chart

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Add business application lifecycle data using the bubble chart

Create or edit the life cycle of a business application to manage the business application.

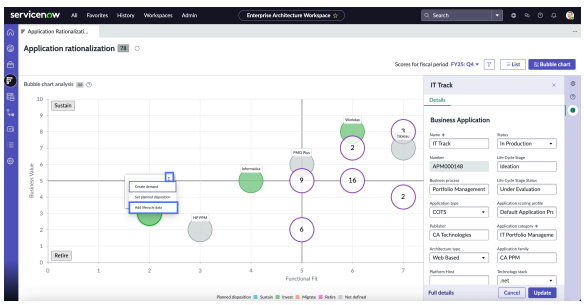
Before you begin

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 Run a scheduled job to generate an application model for business applications - Legacy.

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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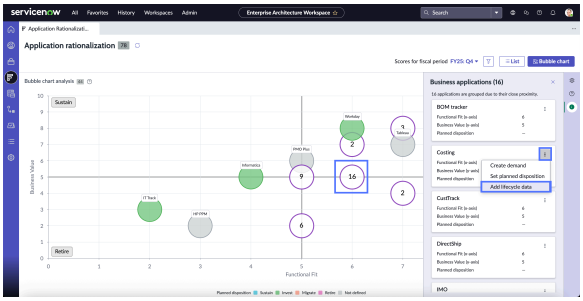
Bubble type	Action
	b. Select the context menu icon next to (⋮) and select **Add lifecycle data**. 

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. **Note:** Select **Full details** to view more details about the business application.

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Bubble type	Action
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 busi ness application details are displayed. **Note:** Select **Full details** to view more details about the business application.

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.

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

View scores of a custom scoring profile on bubble chart

Create a system property to view indicator scores of a custom scoring profile on the application rationalization bubble chart.

Before you begin
Role required: admin

Procedure

1. Navigate to **All** and in the filter enter `sys_properties.list`.
2. Verify that the property does not exist by searching for the property name in the System Properties table.
3. Click **New**.
4. On the form, fill in the following details.
   - Name- Name of the property you're creating. In this case, `sn_apm_ws.app_indicator_scoring_profile`.
   - Description- Type a brief, descriptive phrase describing the function of the property.
   - Type- String.
   - Value- Enter the value as `new_scoring_profile_sys_id`.
5. Select **Submit**.

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Result

The Application Rationalization bubble chart view displays the bubbles representing the scores generated for the new scoring profile.

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

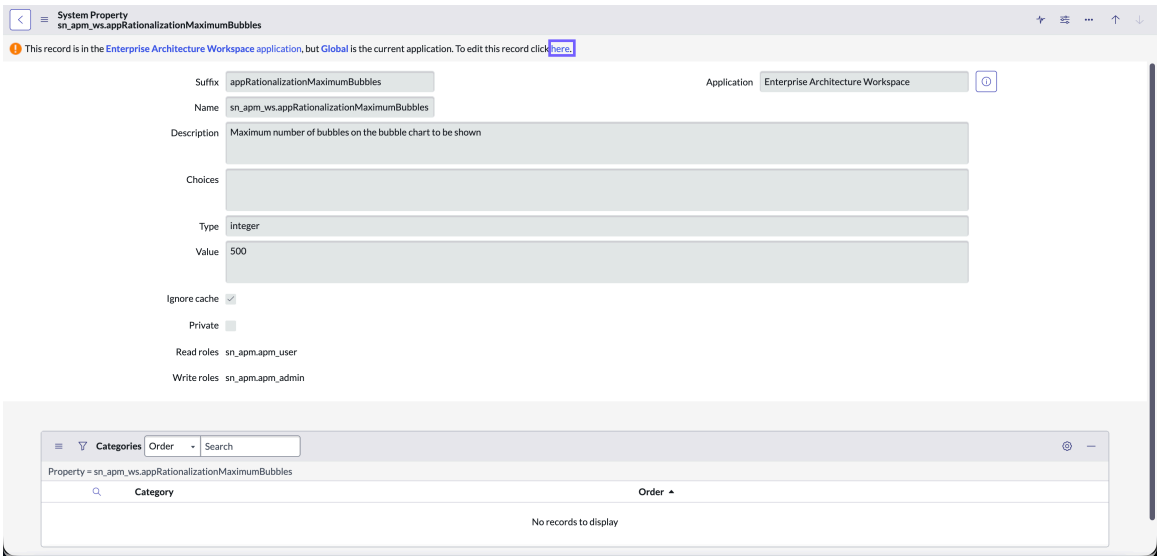
Role required: sn_apm.apm_admin

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, you can configure the *sn_apm_ws.appRationalizationMaximumBubbles* system property to increase this limit and display all assessed applications as bubbles on the bubble chart page.

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 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.

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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 ( ).
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**.

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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 Run a scheduled job to generate an application model for business applications - Legacy.

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 row context menu icon (⋮) next to the business application that you want to add business application lifecycle data for and select **Add lifecycle data**.
4. 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.
5. Select **Create**.

Related topics

Edit business application details in list view

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

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.

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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**.

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.

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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 so that you can use the data 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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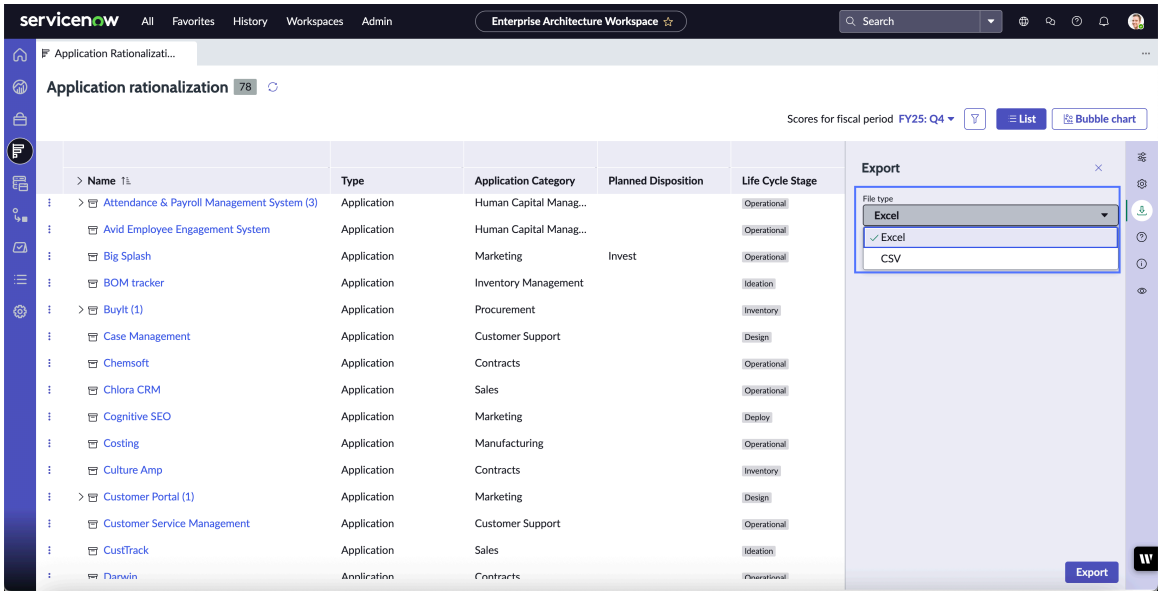

5. Select **Export**.

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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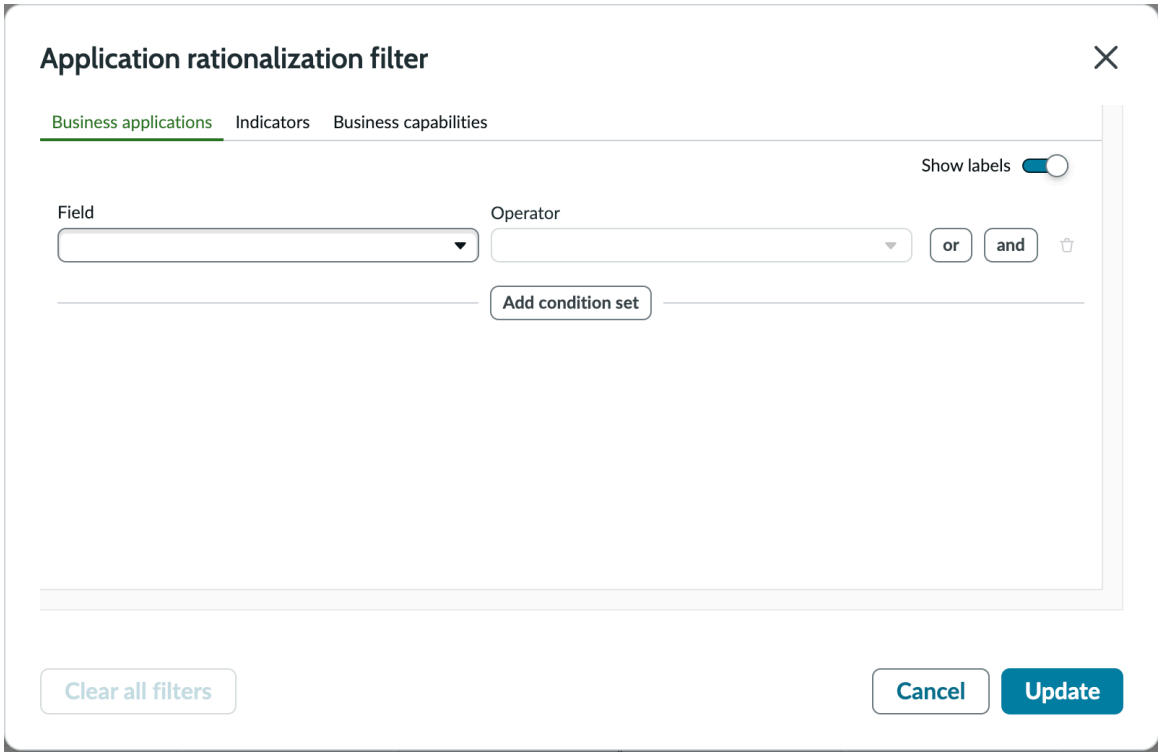

4. To filter business applications based on specific data, select any of the following tabs:
   - **Business applications**
   - **Indicators**
   - **Business capabilities**

   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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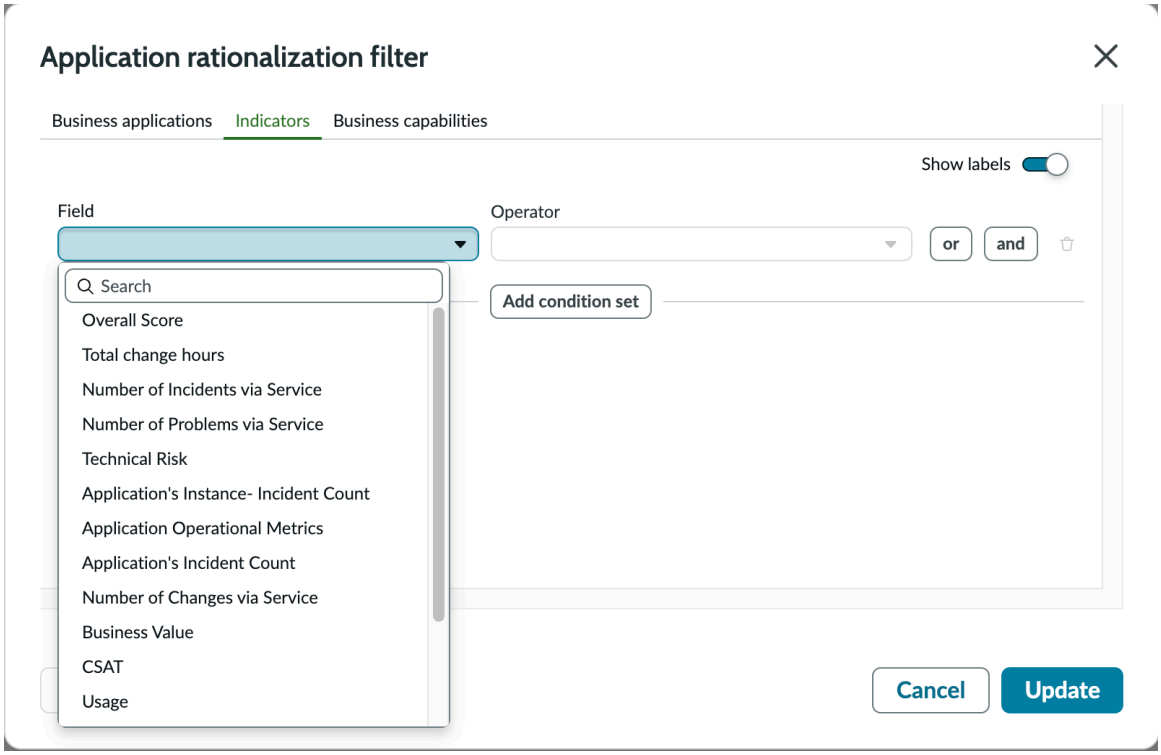

6. Select **Update**.
   The bubble chart and the list view pages are updated based on your applied filters. Also, an indicator is displayed on top of the filter icon to show the number of filters applied.

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 Portfolio Management (TPM) in EA Workspace

Technology Portfolio 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 TPM

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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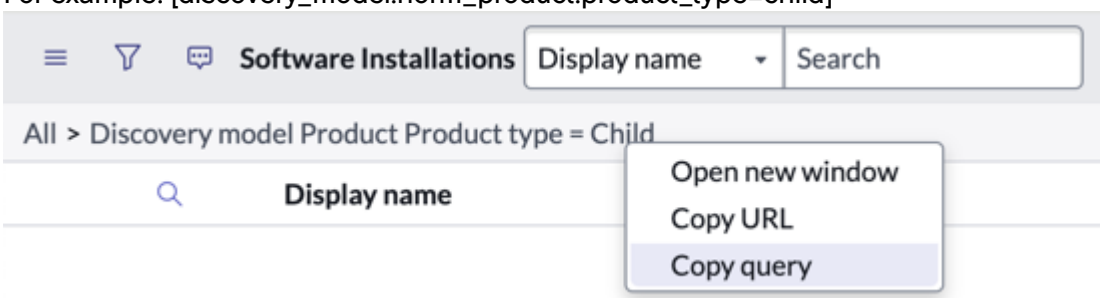
Before you begin
Role required: admin

About this task
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.
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**.

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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 Populate TPM Discovered Technologies and Lifecycles scheduled 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 Portfolio Management (TPM) lifecycle data including end of support date, end of extended support date, and end of life date for your software and hardware models for your business applications and application services.

Before you begin
Role required: sn_apm.apm_user

About this task
You can refresh the TPM 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.

TPM lifecycle record identifiers are automatically generated on creating a TPM record using the Technology Portfolio Management (sn_apm_tpm) plugin version 1.9.0. However, for TPM lifecycle records generated using previous versions of the TPM plugin don't have any lifecycle record identifiers. The TPM record identifiers of these TPM 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 Portfolio Management lifecycle record identifier.

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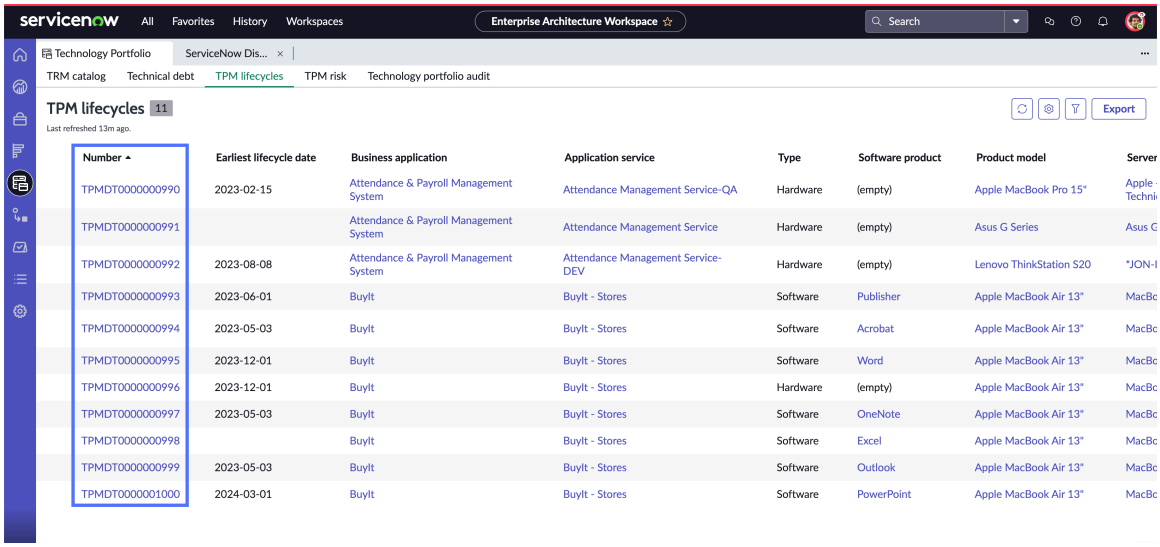

On selecting a TPM lifecycle record identifier, more information on the TPM lifecycle record is displayed.

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

Schedule a job to generate TPM lifecycle data - Legacy

Run a scheduled job to generate TPM lifecycle data - Legacy

Restart Populate TPM Discovered Technologies and Lifecycles scheduled job

You can restart the *`TPM Discovered Technologies and Lifecycles`* job if it encounters any interruptions or failures.

Before you begin

Role required: admin

About this task

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 becomes 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 and if there's no update to the count of TPM discovered technologies in the system.

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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 the relevant TPM log that you want to restart the *TPM Discovered Technologies and Lifecycles* job for.
5. Select **Restart**.

Related topics

- Manage the Technology Portfolio Management (TPM) in Enterprise Architecture Workspace
- Update TPM data for a business application or application service
- View TPM logs

View technology lifecycle details

You can view the Technology Portfolio Management (TPM) lifecycle timelines in Enterprise Architecture Workspace, to track the different phases of a product's lifecycle, such as end of support, end of extended support, and end of life.

Before you begin

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

Role required: sn_apm.apm_user

About this task

The TPM lifecycle data enables you to manage your technology portfolio effectively, ensuring your business applications and their related application services are updated or replaced timely.

Note: For each TPM 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.

Procedure

1. Navigate to **Workspaces** > *Enterprise Architecture Workspace*.
2. Open the Technology Portfolio page by selecting the Technology Portfolio icon .
3. Select **TPM 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 TPM
- Update the system property to gather software products from a CMDB table
- Update verification status of TPM audit details
- Restart Populate TPM Discovered Technologies and Lifecycles scheduled job
- View TPM logs
- View TPM risk details

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View TPM risk details

View all the Technology Portfolio Management (TPM) 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

You can use the TPM risk scores to manage and mitigate the risks associated with your software products and hardware models.

The TPM risk details of software products and hardware models are calculated based on their lifecycle dates that are the end of support, end of extended support, and end of life dates. 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.

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 - Legacy.

Related topics

- Update TPM data for a business application or application service
- Restart Populate TPM Discovered Technologies and Lifecycles scheduled 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 Portfolio Management (TPM) 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 Portfolio Management plugin (sn_apm_tpm) version 1.6.0.

Role required: admin

About this task

You can include other CMDB tables that contain software products, to fetch and view TPM software products data from those tables.

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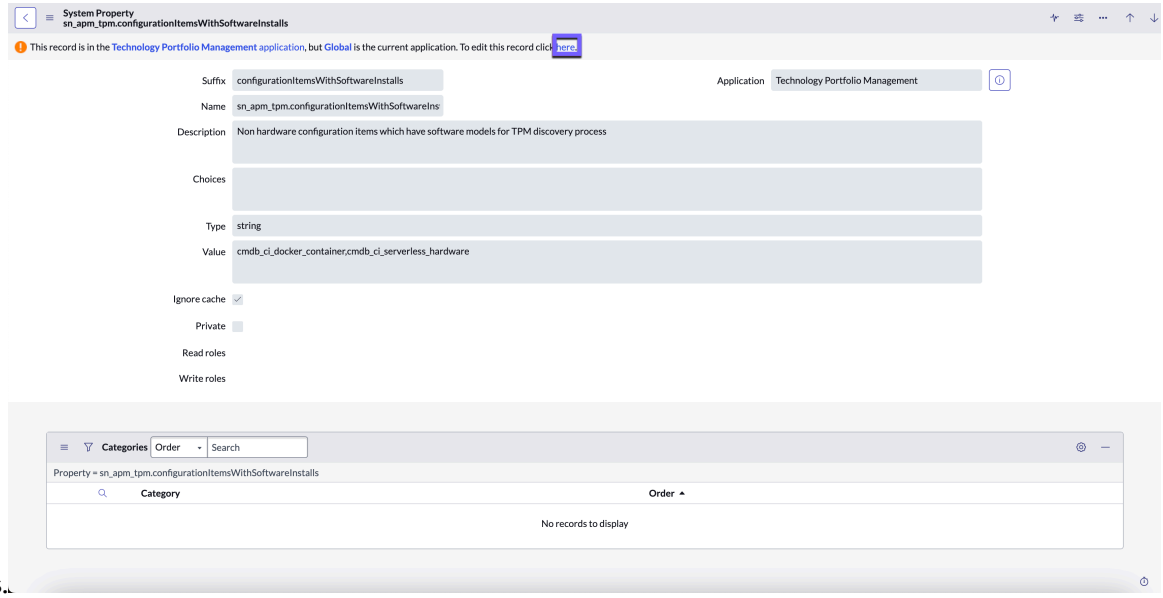
Procedure

1. Select **All** and in the navigation filter enter *sys_properties.list*.
2. Navigate to the *sn_apm_tpm.configurationItemsWithSoftwareInstalls* system property.
3. Select **here** to update the property



details.

4. In the **Value** field, add the CMDB table name that contains the details of the TPM 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 TPM software products.

Related topics

Manage the Technology Portfolio Management (TPM) in Enterprise Architecture Workspace

Run a scheduled job to generate TPM lifecycle data - Legacy

Schedule a job to generate TPM lifecycle data - Legacy

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.

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Before you begin
Role required: sn_apm.apm_analyst

About this task
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 Portfolio Management (TPM) 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

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
Manage the Technology Portfolio Management (TPM) in Enterprise Architecture Workspace

Restart Populate TPM Discovered Technologies and Lifecycles scheduled 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

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View technology portfolio audit risk details

Update verification status of TPM audit details

Run a scheduled job to populate Technology Portfolio Management lifecycle record identifier

Run the Populate Number field in TPM Discovered Technologies job to populate missing Technology Portfolio Management (TPM) lifecycle record identifiers.

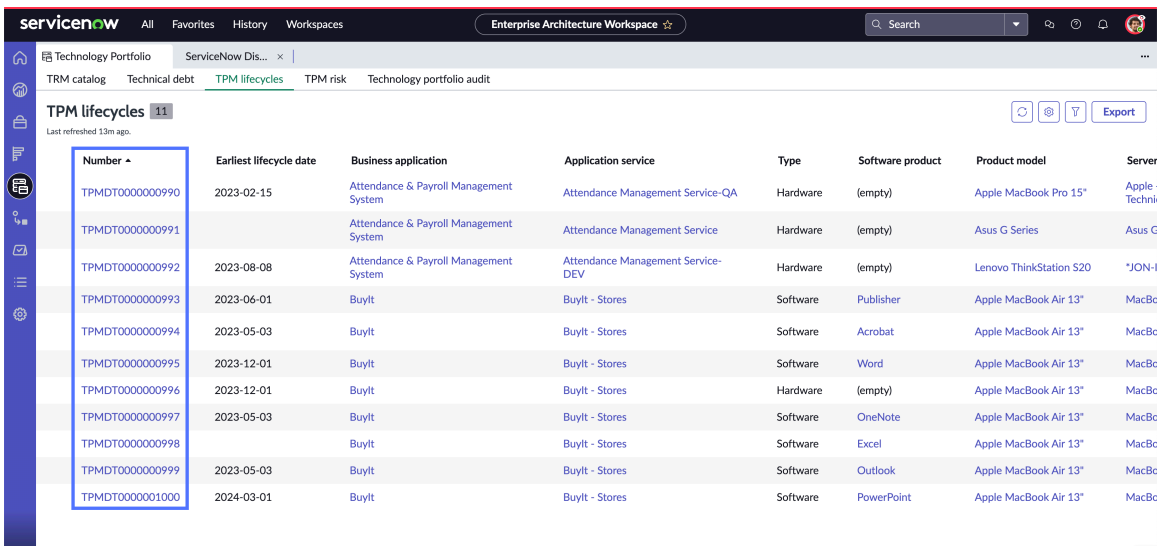
Before you begin

Ensure the Technology Portfolio Management (sn_apm_tpm) plugin version 1.9.0. is installed and activated.

Role required: admin

About this task

TPM lifecycle record identifiers are automatically generated on creating a TPM record using the Technology Portfolio Management (sn_apm_tpm) plugin version 1.9.0. However, for TPM lifecycle records generated using previous versions of the TPM plugin don't have any lifecycle record identifiers. The TPM record identifiers of these TPM lifecycle records must be generated using the Populate Number field in TPM Discovered Technologies job.



Number	Earliest lifecycle date	Business application	Application service	Type	Software product	Product model	Server
TPMDT0000000990	2023-02-15	Attendance & Payroll Management System	Attendance Management Service-QA	Hardware	(empty)	Apple MacBook Pro 15"	Apple Techni
TPMDT0000000991		Attendance & Payroll Management System	Attendance Management Service	Hardware	(empty)	Asus G Series	Asus G
TPMDT0000000992	2023-08-08	Attendance & Payroll Management System	Attendance Management Service-DEV	Hardware	(empty)	Lenovo ThinkStation S20	*JON-I
TPMDT0000000993	2023-06-01	BuyIt	BuyIt - Stores	Software	Publisher	Apple MacBook Air 13"	MacBc
TPMDT0000000994	2023-05-03	BuyIt	BuyIt - Stores	Software	Acrobat	Apple MacBook Air 13"	MacBc
TPMDT0000000995	2023-12-01	BuyIt	BuyIt - Stores	Software	Word	Apple MacBook Air 13"	MacBc
TPMDT0000000996	2023-12-01	BuyIt	BuyIt - Stores	Hardware	(empty)	Apple MacBook Air 13"	MacBc
TPMDT0000000997	2023-05-03	BuyIt	BuyIt - Stores	Software	OneNote	Apple MacBook Air 13"	MacBc
TPMDT0000000998		BuyIt	BuyIt - Stores	Software	Excel	Apple MacBook Air 13"	MacBc
TPMDT0000000999	2023-05-03	BuyIt	BuyIt - Stores	Software	Outlook	Apple MacBook Air 13"	MacBc
TPMDT0000001000	2024-03-01	BuyIt	BuyIt - Stores	Software	PowerPoint	Apple MacBook Air 13"	MacBc

On selecting a TPM lifecycle record identifier, more information on the TPM 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 Portfolio Management. For information on how to change the application scope, see Select an application from the application picker

Result

The missing TPM lifecycle record identifiers are generated for the older TPM lifecycle records.

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Related topics

- Activate the Technology Portfolio Management (TPM) plugin
- Manage the Technology Portfolio Management (TPM) in Enterprise Architecture Workspace
- Update TPM data for a business application or application service

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.

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 .
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
- Request a TRM product lifecycle
- Add a TRM product in Enterprise Architecture Workspace
- Associate an Architectural Artifact to a TRM product
- Add a TRM product lifecycle
- View TRM technical debts
- Run a scheduled job to update TRM technical debt data in EA Workspace
- 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

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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 *TRM* **Categories**.
4. Select **All**.

Related topics

- Manage TRM categories
- Add or edit a TRM category
- View TRM technical debts
- View all TRM phases
- Add a TRM product in Enterprise Architecture Workspace
- View all TRM products
- Run a scheduled job to update TRM technical debt data in EA Workspace
- Request a TRM product
- View all TRM products grouped by product category
- Request a TRM product lifecycle
- Associate an Architectural Artifact to a TRM product
- Add a TRM product lifecycle

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 TRM technical debts
- View all TRM phases
- Add a TRM product in Enterprise Architecture Workspace
- View all TRM categories
- View all TRM products

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Run a scheduled job to update TRM technical debt data in EA Workspace

Request a TRM product

Request a TRM product lifecycle

Associate an Architectural Artifact to a TRM product

Add a TRM product lifecycle

View all TRM products

You can view all available Technology Reference Model (TRM) products in the Enterprise Architecture Workspace.

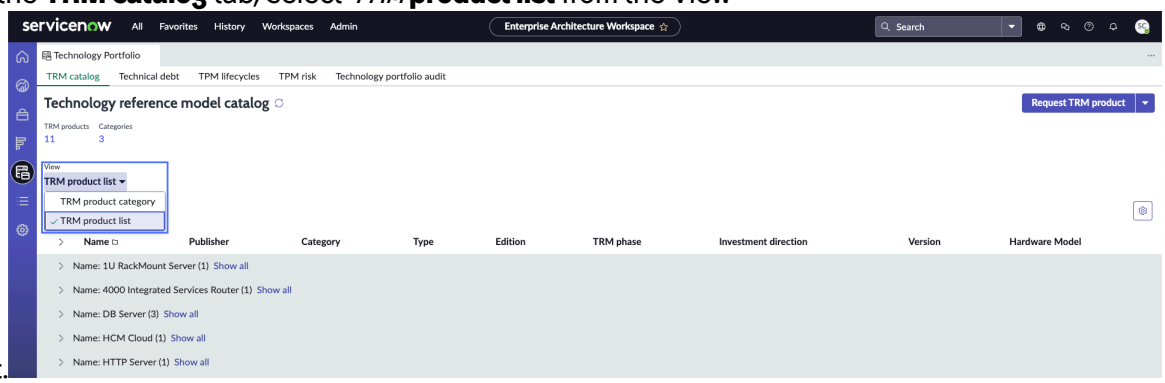
Before you begin

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 .
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 TRM technical debts

View all TRM phases

Add a TRM product in Enterprise Architecture Workspace

View all TRM categories

Run a scheduled job to update TRM technical debt data in EA Workspace

Request a TRM product

View all TRM products grouped by product category

Request a TRM product lifecycle

Associate an Architectural Artifact to a TRM product

Add a TRM product lifecycle

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Request a TRM product

You can request a TRM product using the TRM catalog to add a new software or hardware to the TRM library.

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. Select **Request TRM product**.
4. On the form, fill in the fields.
   For field information, see Request TRM product form.
5. Select **Create**.

Related topics

- View TRM technical debts
- View all TRM phases
- Add a TRM product in Enterprise Architecture Workspace
- View all TRM categories
- View all TRM products
- Run a scheduled job to update TRM technical debt data in EA Workspace
- View all TRM products grouped by product category
- Request a TRM product lifecycle
- Associate an Architectural Artifact to a TRM product
- Add a TRM product lifecycle

Request a TRM product lifecycle

You can add a new request to create a life cycle for a TRM product.

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. Select the TRM more actions icon next to **Request** *TRM* **product**.
4. Select **Request** *TRM* **product lifecycle**.
5. On the form, fill in the fields.
   For field information, see Request TRM product lifecycle form.
6. Select **Create**.

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Related topics

- View TRM technical debts
- View all TRM phases
- Add a TRM product in Enterprise Architecture Workspace
- View all TRM categories
- View all TRM products
- Run a scheduled job to update TRM technical debt data in EA Workspace
- Request a TRM product
- View all TRM products grouped by product category
- Associate an Architectural Artifact to a TRM product
- Add a TRM product lifecycle

Add a TRM product in Enterprise Architecture Workspace

As an Enterprise Architect, you can add a new TRM product to the TRM library.

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 TRM more actions icon next to **Request** *TRM* **product**.
4. Select **Create** *TRM* **Product**.
5. On the form, fill in the fields.

   For field information, see TRM product form.
6. Select **Create**.

Related topics

- View TRM technical debts
- View all TRM phases
- View all TRM categories
- View all TRM products
- Run a scheduled job to update TRM technical debt data in EA Workspace
- Request a TRM product
- View all TRM products grouped by product category
- Request a TRM product lifecycle
- Associate an Architectural Artifact to a TRM product
- Add a TRM product lifecycle

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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.
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

- Add a TRM product lifecycle
- View TRM technical debts
- View all TRM phases
- Add a TRM product in Enterprise Architecture Workspace
- View all TRM categories
- View all TRM products
- Run a scheduled job to update TRM technical debt data in EA Workspace
- Request a TRM product
- View all TRM products grouped by product category
- Request a TRM product lifecycle

Add a TRM product lifecycle

As an Enterprise Architect, you can add a new TRM product lifecycle.

Before you begin

You must be part of the Enterprise Architect Group.

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. Select the TRM more actions icon next to **Request** *TRM* **product**.

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4. Select **Create *TRM* product lifecycle**.
5. On the form, fill in the fields.

   For field information, see Create TRM product lifecycle form.
6. Select **Create**.

Related topics

- View TRM technical debts
- View all TRM phases
- Add a TRM product in Enterprise Architecture Workspace
- View all TRM categories
- View all TRM products
- Run a scheduled job to update TRM technical debt data in EA Workspace
- Request a TRM product
- View all TRM products grouped by product category
- Request a TRM product lifecycle
- Associate an Architectural Artifact to a TRM product

View product capabilities associated with a Technology Reference Model product

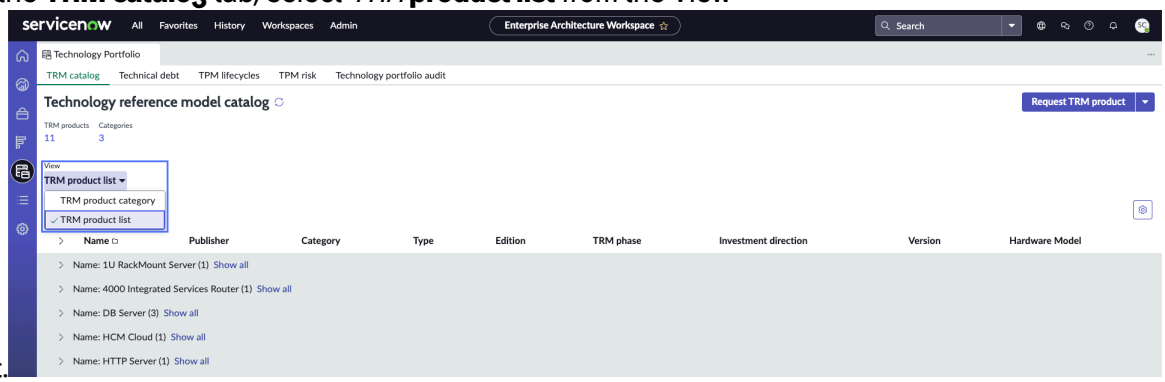
You can view the list of product capabilities associated with Technology Reference Model (TRM) product, in the Enterprise Architecture Workspace.

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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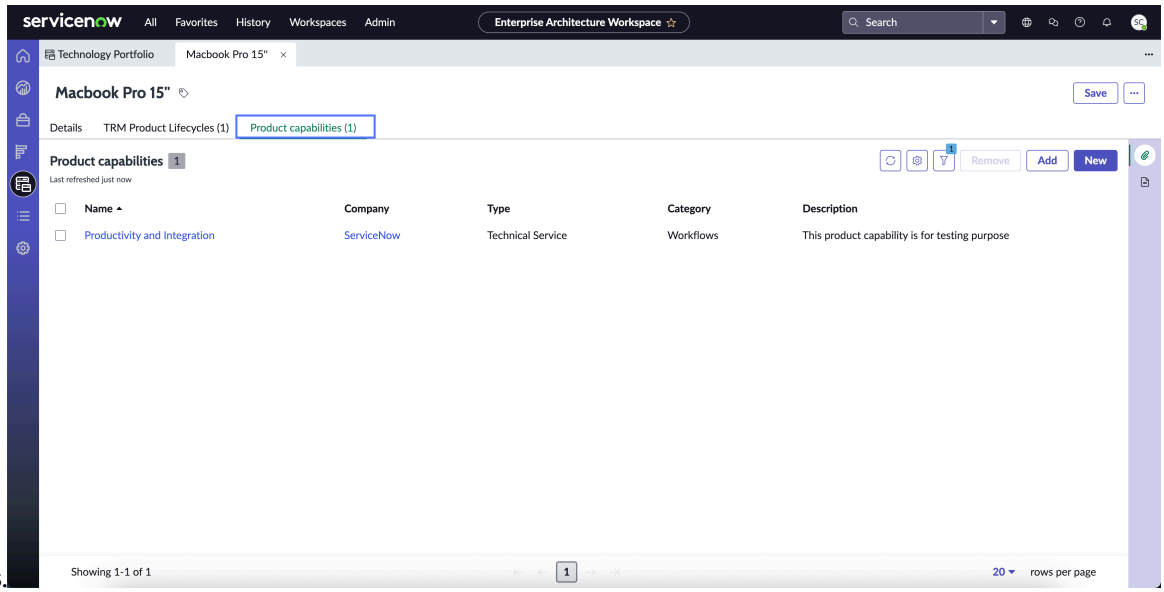
5. Select the TRM product.
6. Select **Product capabilities.**



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 associated with a Technology Reference Model product

Create product capabilities and associate it with a Technology Reference Model product

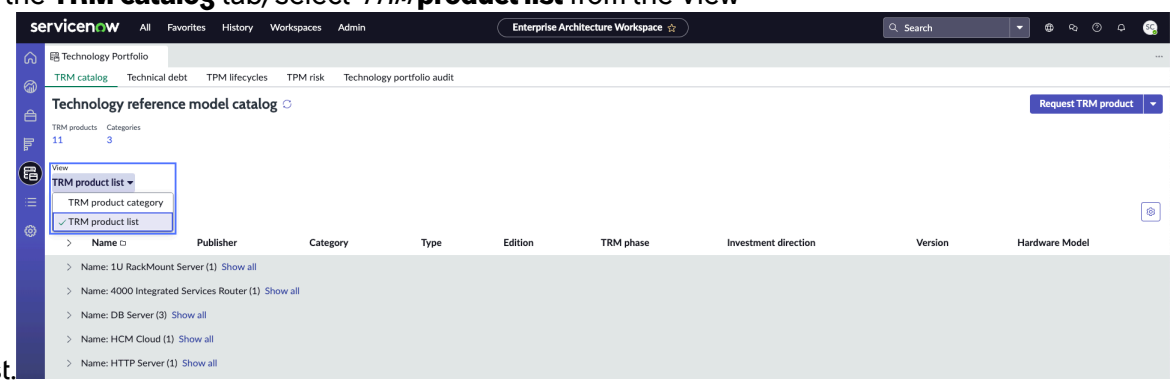
You can create product capabilities and associate it with Technology Reference Model (TRM) products in the Enterprise Architecture Workspace.

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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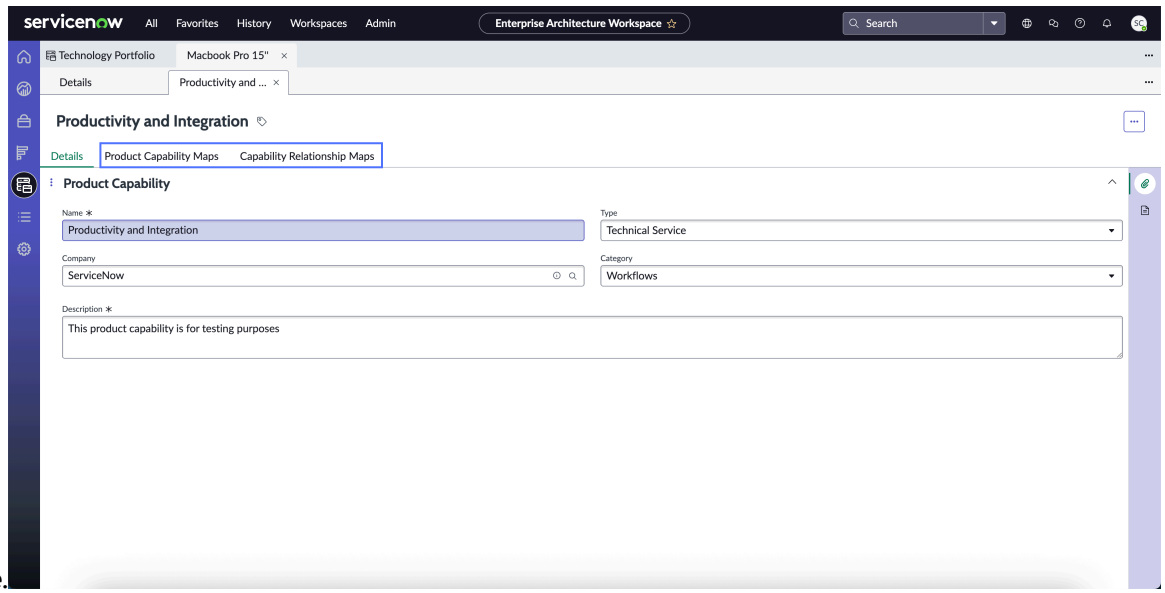
4. Select the expand row icon ( ) next to the TRM product that you want to create and associate new product capabilities to.
5. Select the TRM product.
6. Select **Product capabilities**.
7. To create a new product capability and associate with the TRM product, select **New**.
8. In the Create New Product 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 associated with a Technology Reference Model 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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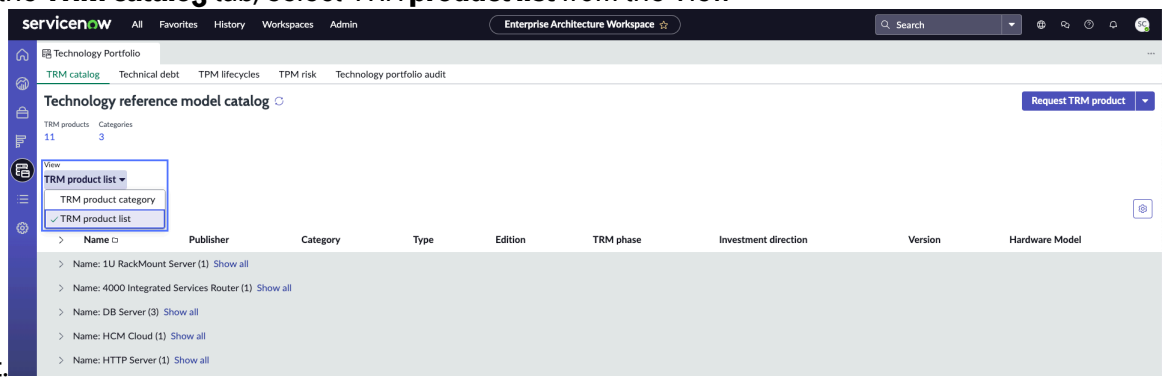
3. In the **TRM catalog** tab, select *TRM* **product list** from the View list.



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 associated with a Technology Reference Model product

Remove product capabilities associated with a Technology Reference Model 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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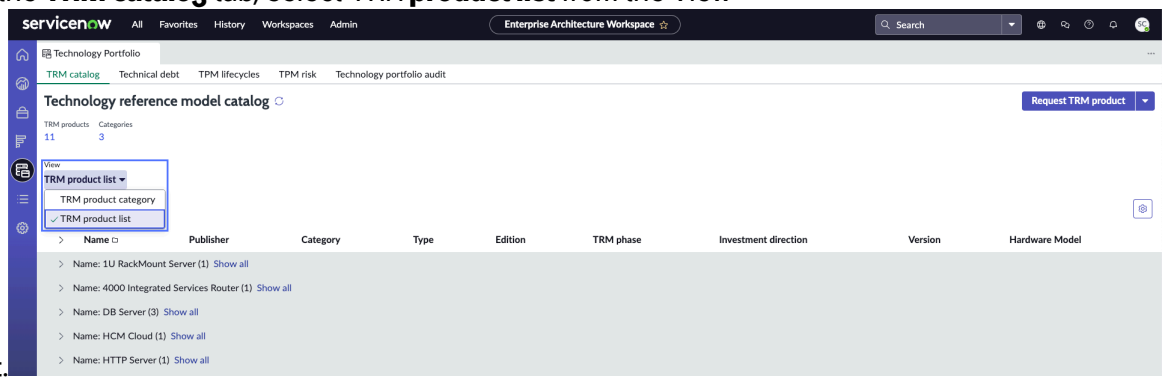
3. In the **TRM catalog** tab, select *TRM* **product list** from the View list.



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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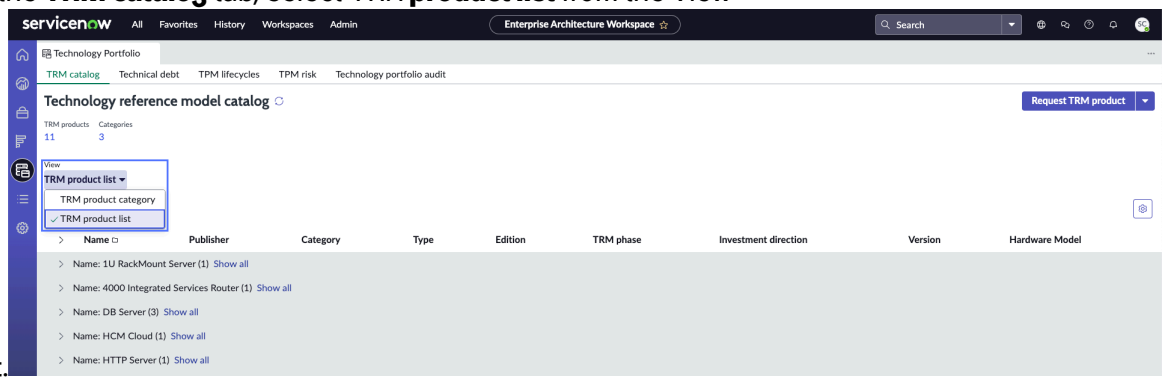
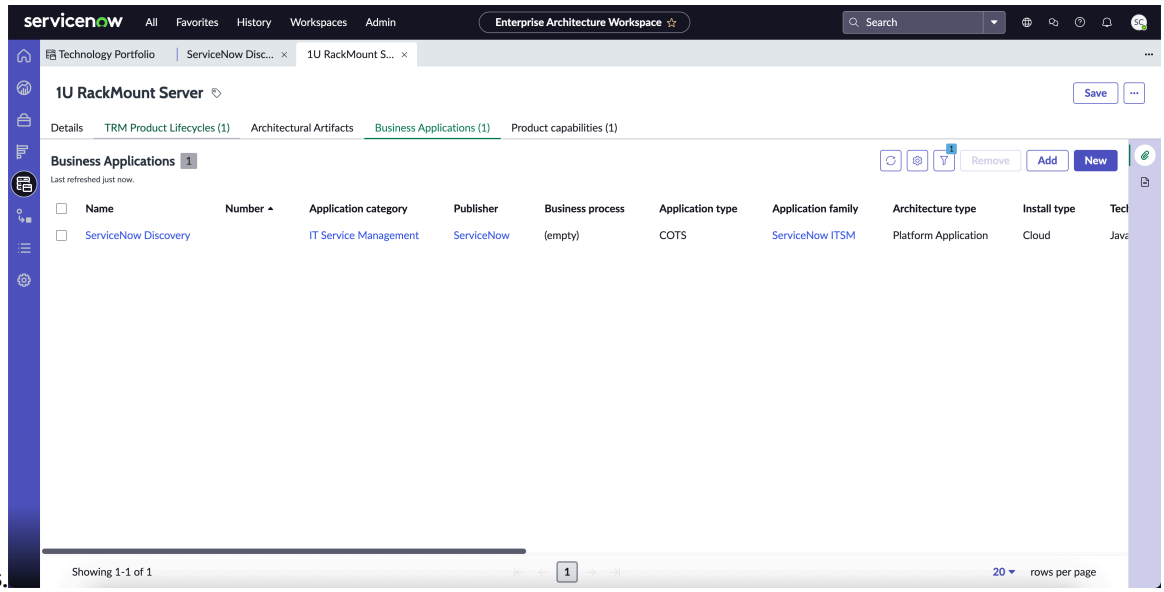
3. In the **TRM catalog** tab, select *TRM* **product list** from the View list.



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

- Manage the 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 it 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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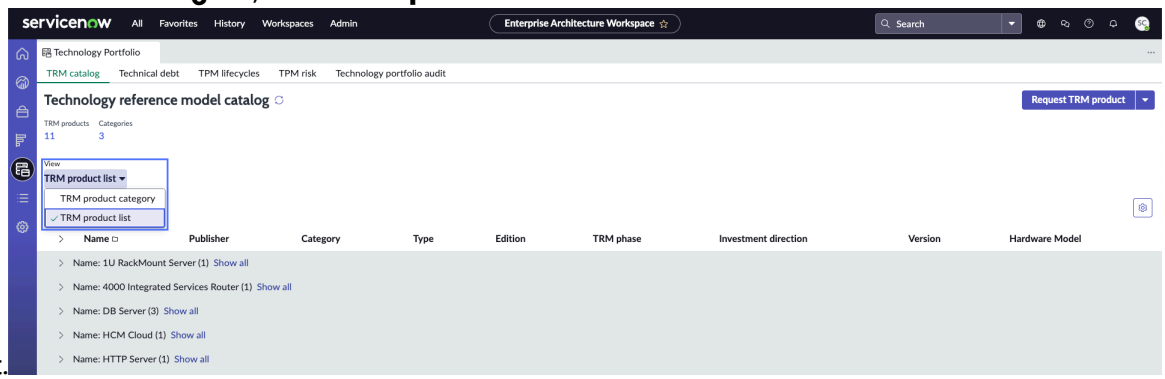
Procedure

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

- Manage the 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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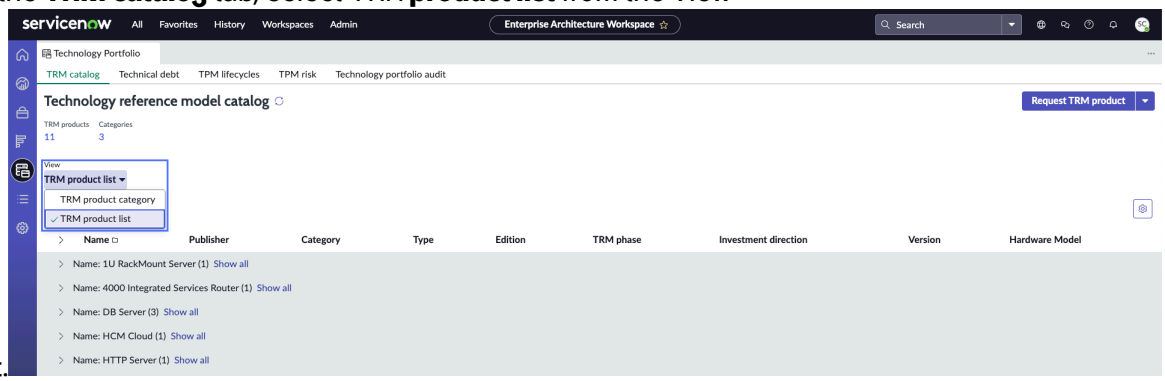
3. In the **TRM catalog** tab, select *TRM* **product list** from the View list.



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

- Manage the 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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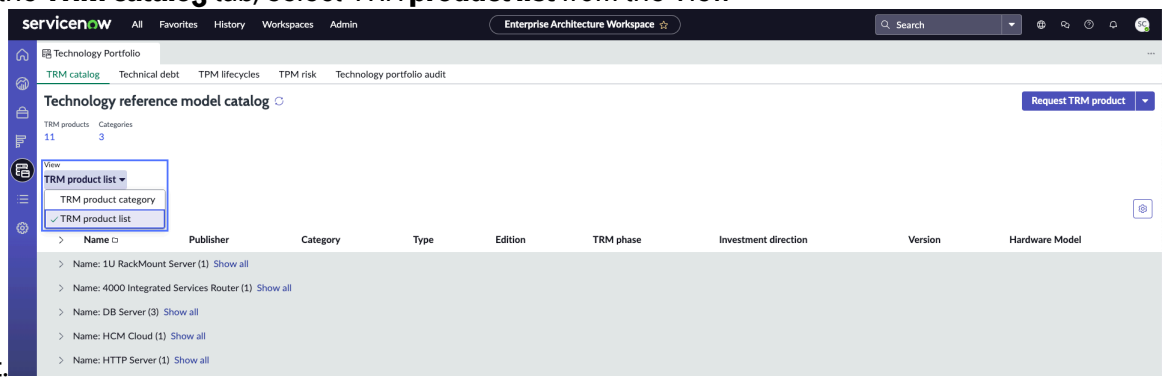
3. In the **TRM catalog** tab, select *TRM* **product list** from the View list.



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 TRM technical debts

You can view the Technology Reference Model (TRM) technical debts that are created for the products that aren't aligned with the TRM phases and standards.

Before you begin

Role required: sn_apm.apm_analyst

About this task

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 EA 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 TRM Technical Debt calculation in Enterprise Architecture Workspace.

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 **Workspace** > *`Enterprise Architecture Workspace`*.
2. Open the Technology Portfolio page by selecting the Technology Portfolio icon .
3. Select **Technical Debt**.
4. View the TRM technical debts.
   For field information, see TRM technical debt form.

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Result
Review the list of TRM products and associated business applications details. You can also view the reason for the technical debt.

Related topics
- View all TRM phases
- Add a TRM product in Enterprise Architecture Workspace
- View all TRM categories
- View all TRM products
- Run a scheduled job to update TRM technical debt data in EA Workspace
- Request a TRM product
- View all TRM products grouped by product category
- Request a TRM product lifecycle
- Associate an Architectural Artifact to a TRM product
- Add a TRM product lifecycle
- Manage the Technology Reference Model in Enterprise Architecture Workspace
- View or update your TRM requests

Run a scheduled job to update TRM technical debt data in EA Workspace

Run a scheduled job to fetch the TRM technical debts data. You must run this job to see the products that are not approved for usage in your enterprise according to the TRM phases defined in Enterprise Architecture Workspace > Setup>TRM Phases>All. You can schedule this job to periodically update the TRM technical debt for all business applications.

Before you begin
Role required: admin

About this task
You must run this job to see the products that are not approved for usage in your enterprise according to the TRM phases defined in Enterprise Architecture Workspace > Setup>TRM Phases>All. You can schedule this job to periodically update the TRM technical debt for all business applications.

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.

Procedure
1. Navigate to **All** > **#System Definition** > **#Scheduled Jobs**.
2. Find and open the# scheduled job*Populate TRM technical debts in the EA Workspace*.
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.

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Related topics

View TRM technical debts

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 (SAM) software products.

Before you begin

Role required: admin

About this task

When you create a TRM product by associating it with a SAM software product, the TRM product inherits the SAM software product name at creation time. If the SAM software product name is later updated — for 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 SAM software product.

Note: 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 SAM software product are updated to match the latest SAM software product names in the TRM Products (sn_apm_trm_standards_product) table. Only TRM products whose names differ from their linked 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

Add a TRM product in Enterprise Architecture Workspace

View all TRM products

View all TRM products grouped by product category

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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

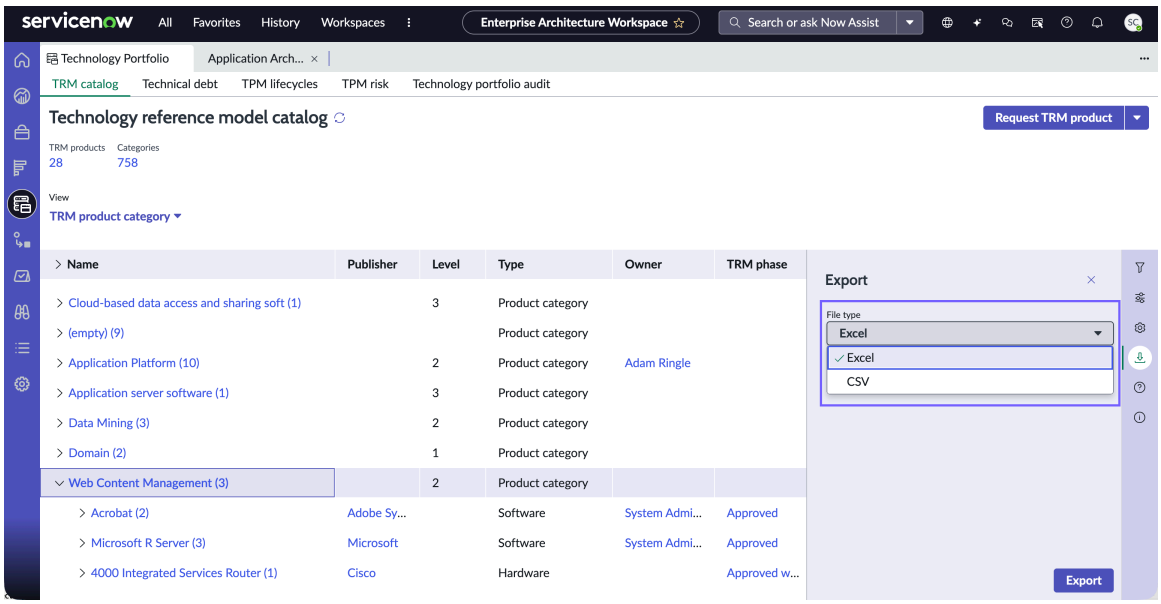
Role required: sn_apm.apm_user

Procedure

1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Technology Portfolio page by selecting the Technology Portfolio icon .
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 TPM and TRM lifecycle timelines

View TPM and TRM lifecycle timelines on the Gantt chart

Use the Gantt chart to view and track Technology Portfolio Management (TPM) and Technology Reference Model (TRM) lifecycle timelines.

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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.

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 TPM 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 TPM and shows the business applications along with their application services.

   Note:

   By default, the TPM 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.

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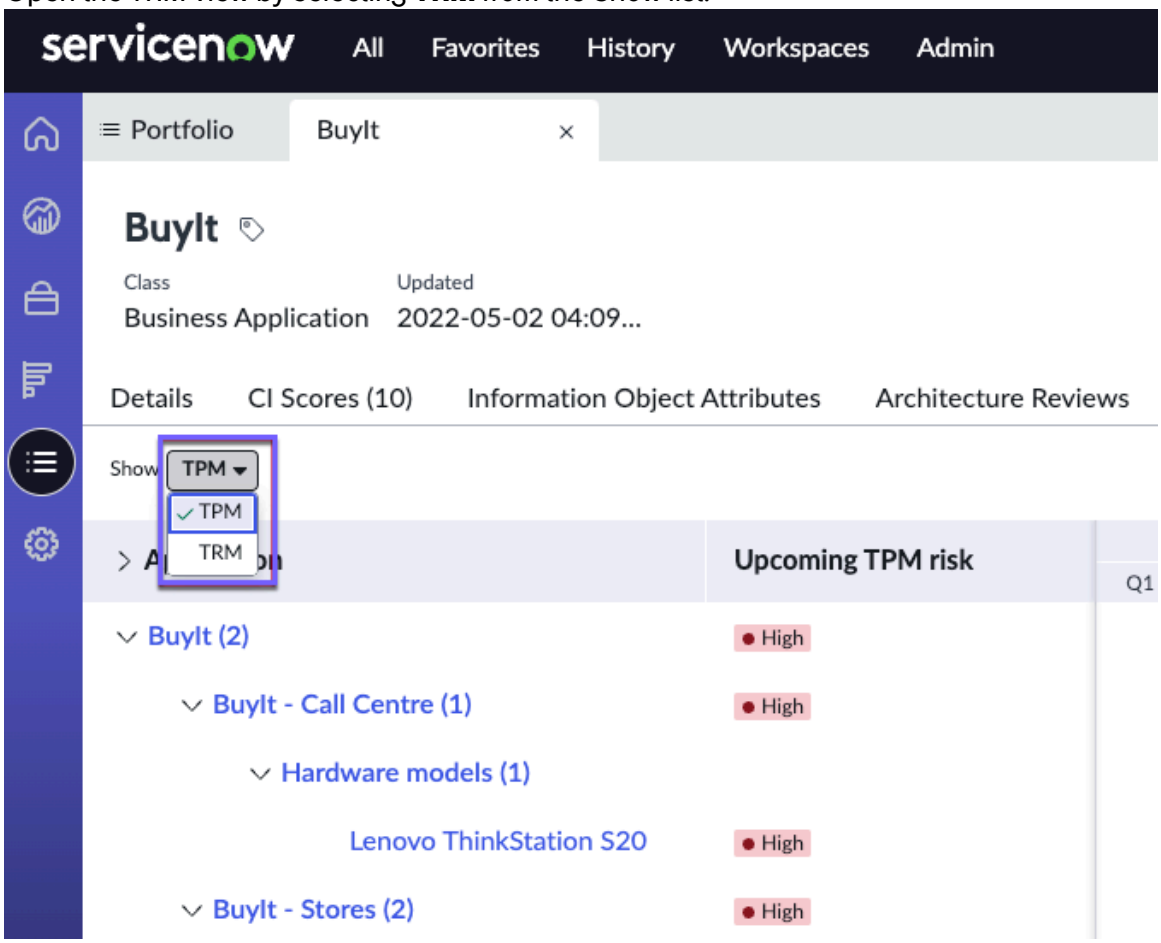
9. Open the TRM view by selecting **TRM** from the Show list.



Related topics

Working with Technology Reference Model (TRM) in EA Workspace

Working with Technology Portfolio Management (TPM) in EA Workspace

Working with application rationalization

Working with Enterprise Modeling and Visualization

Enterprise Modeling and Visualization provides a structured, visual framework for understanding and 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

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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 that 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

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 ( ).
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.

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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

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**.

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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 preference**, 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.

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**.

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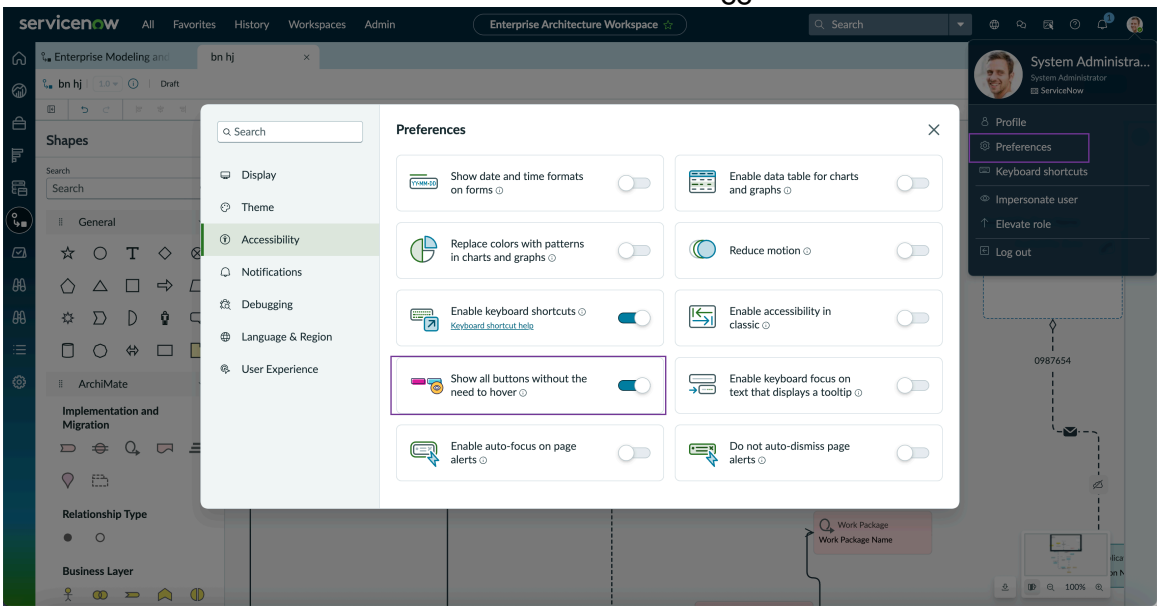
4. Enable the **Show all buttons without the need to hover** toggle.



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.

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

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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

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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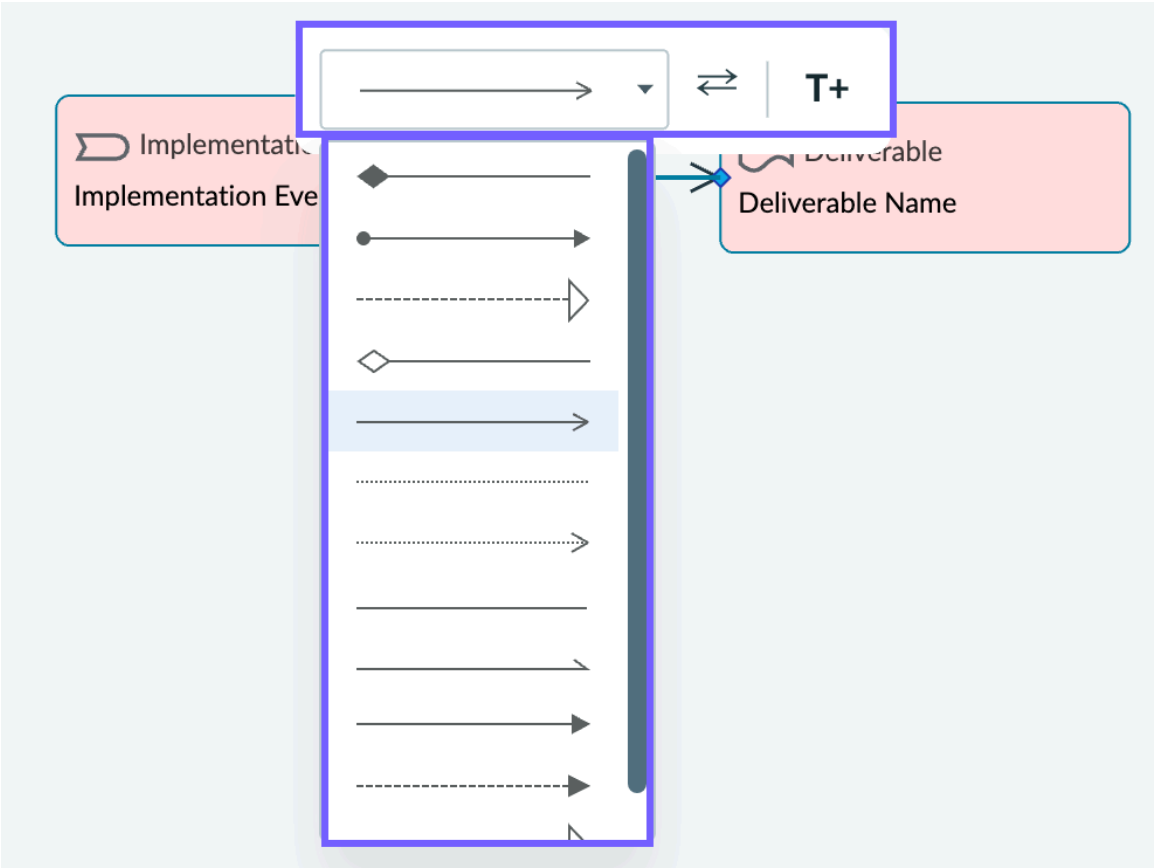
- For ArchiMate connectors (both shapes are ArchiMate shapes), open the **Link type** drop-down and select a relationship type.



- 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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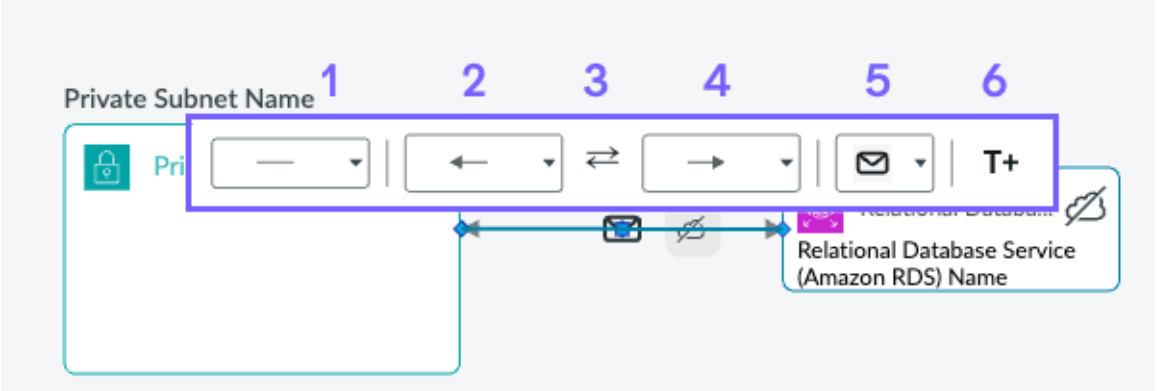

Number	Control	Description
1	**Line style**	Sets the connector line to solid, dashed, or dotted.
2	**Start arrow**	Sets the arrowhead style at the starting end of the connector.
3	**Swap direction**	Reverses the connector orientation, switching the left and right sides.
4	**End arrow**	Sets the arrowhead 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

Role required: sn_apm.apm_user

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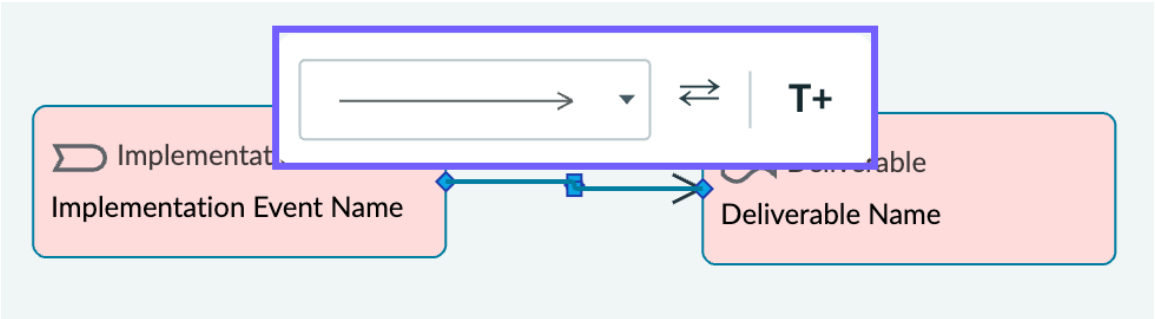
Procedure

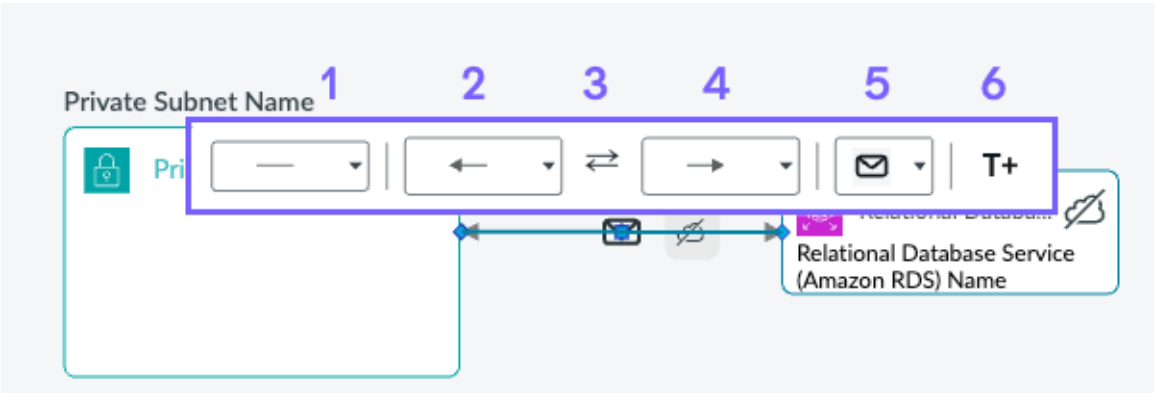
1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Modeling page by selecting the Enterprise Modeling and Visualization icon ( ).
3. Select a diagram from the Diagrams page where you want to add labels to the connector lines.
4. Select a connector line.

   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

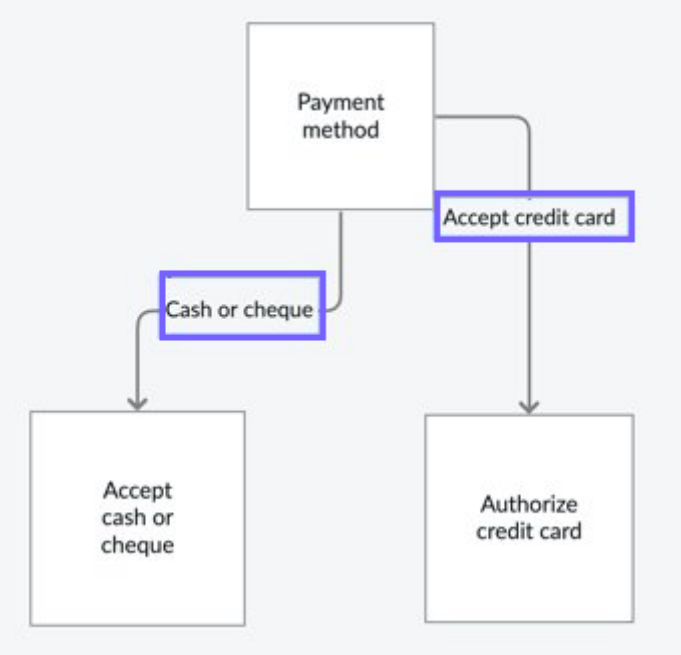

diagram.

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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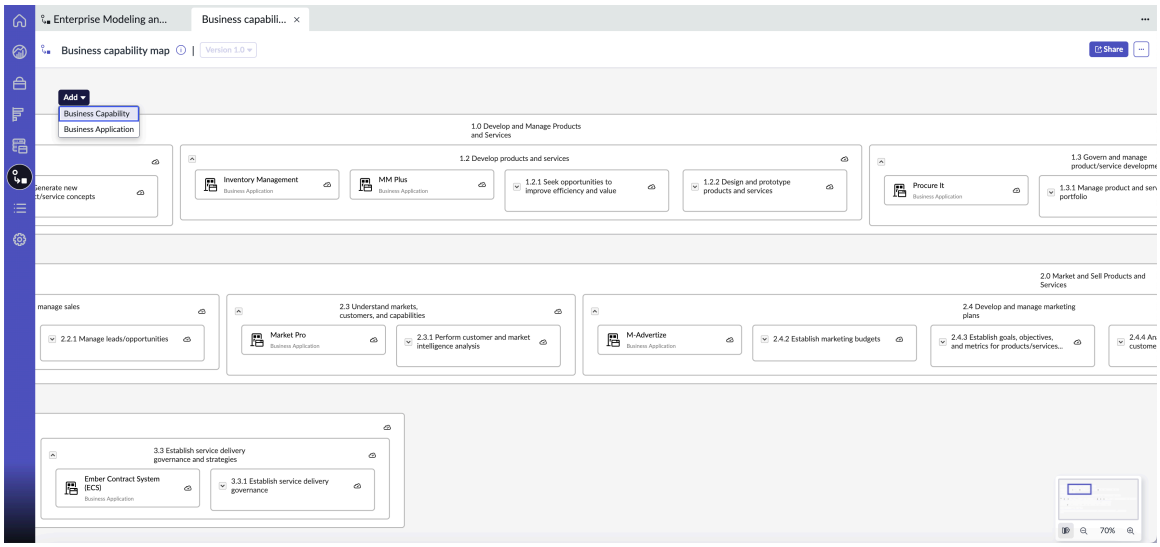
Result



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 a business capability or business application to the 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 a business capability or business application to the capability map

Create diagram for a business hierarchy map

Update a business application hierarchy map

Add a business capability or business application to the capability map

Add a new or existing business capability or business application to the capability map using the Enterprise Modeling and Visualization.

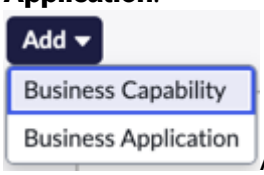
Before you begin

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

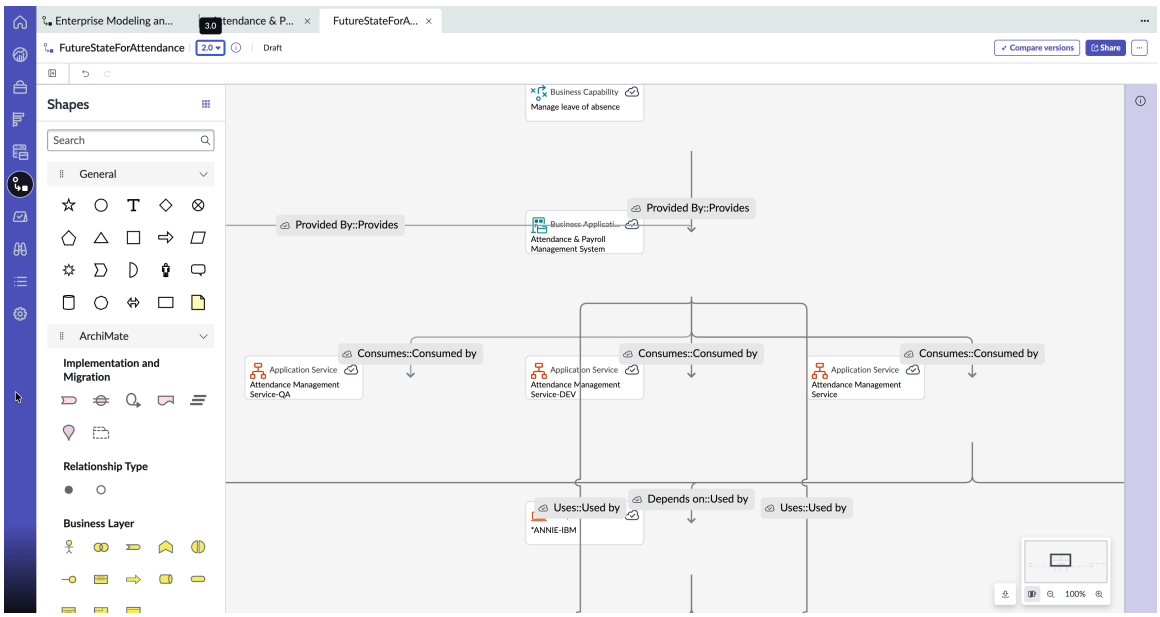
1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Modeling page by selecting the Enterprise Modeling and Visualization icon ( ).
3. Select **New** drop-down menu.
4. Select **Business hierarchy map**.
5. On the Create business hierarchy map form, fill in the details.
   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 a business capability or business application to the 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:

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.

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, icon you drag matches the shape's appearance on the canvas. To preview a shape before placing it, hover over it in the palette.

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. Select the More Actions context menu ( ) to see options for deleting a shape from the canvas.
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:

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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.

8. 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

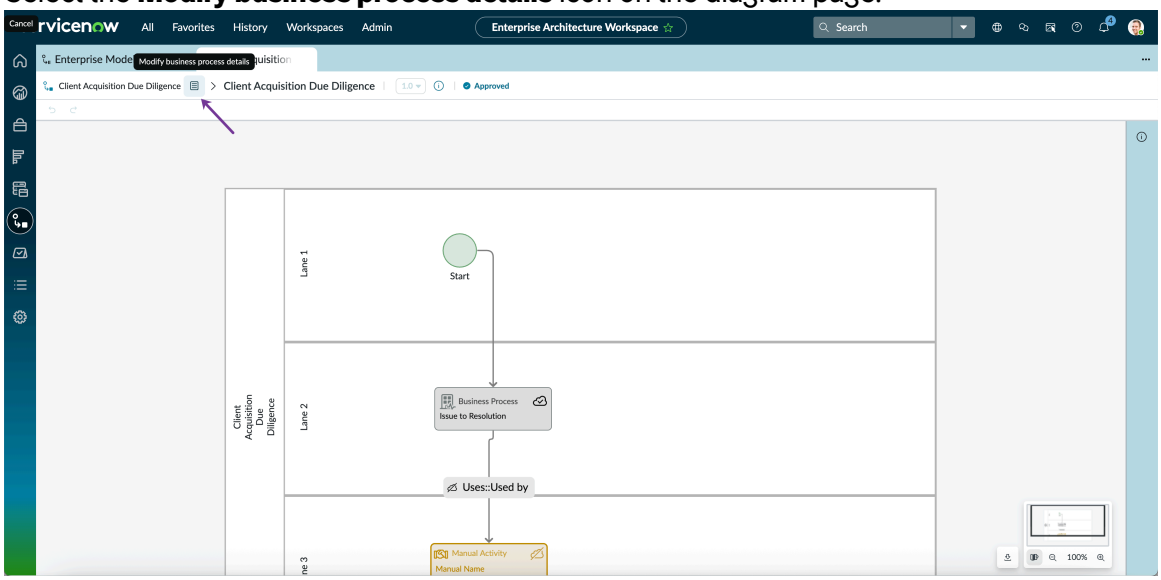
Edit the properties of a BPMN (Business Process Model and Notation) diagram element directly from the diagram page. It enables quick updates without leaving the modeling interface.

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.



5. Modify the details such as name, description, and other details.

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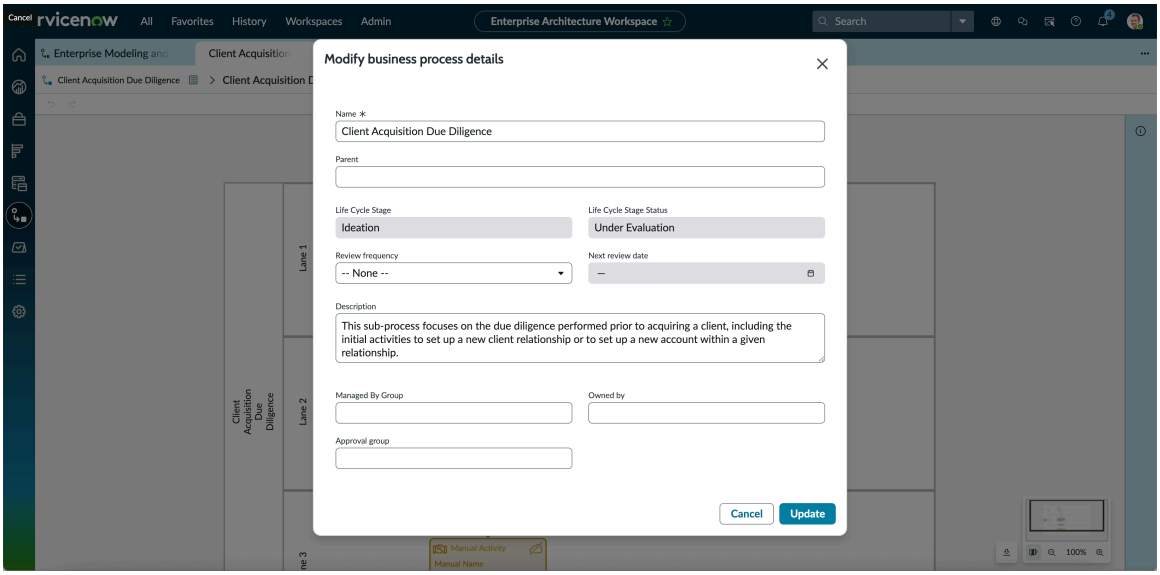

6. Select **Update**.

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 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.

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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 a diagram using ArchiMate shapes and add relationships
- Show shape controls without hovering

Create a 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. If you want to create the diagram with only ArchiMate shapes, you can skip including the name of the Business Application in the Create a business hierarchy map form. It 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**.
   An 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 CI for the selected shape.
9. Select a connector line to update the relationship type.
   The Relationship side panel opens. Select a **Value** and **ArchiMate relationship type**. For more information on the ArchiMate shapes and relationships, see ArchiMate shapes support in the Enterprise Modeling and Visualization.

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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.

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

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Modeling page by selecting the Enterprise Modeling and Visualization icon ( ).

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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.
    - **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.

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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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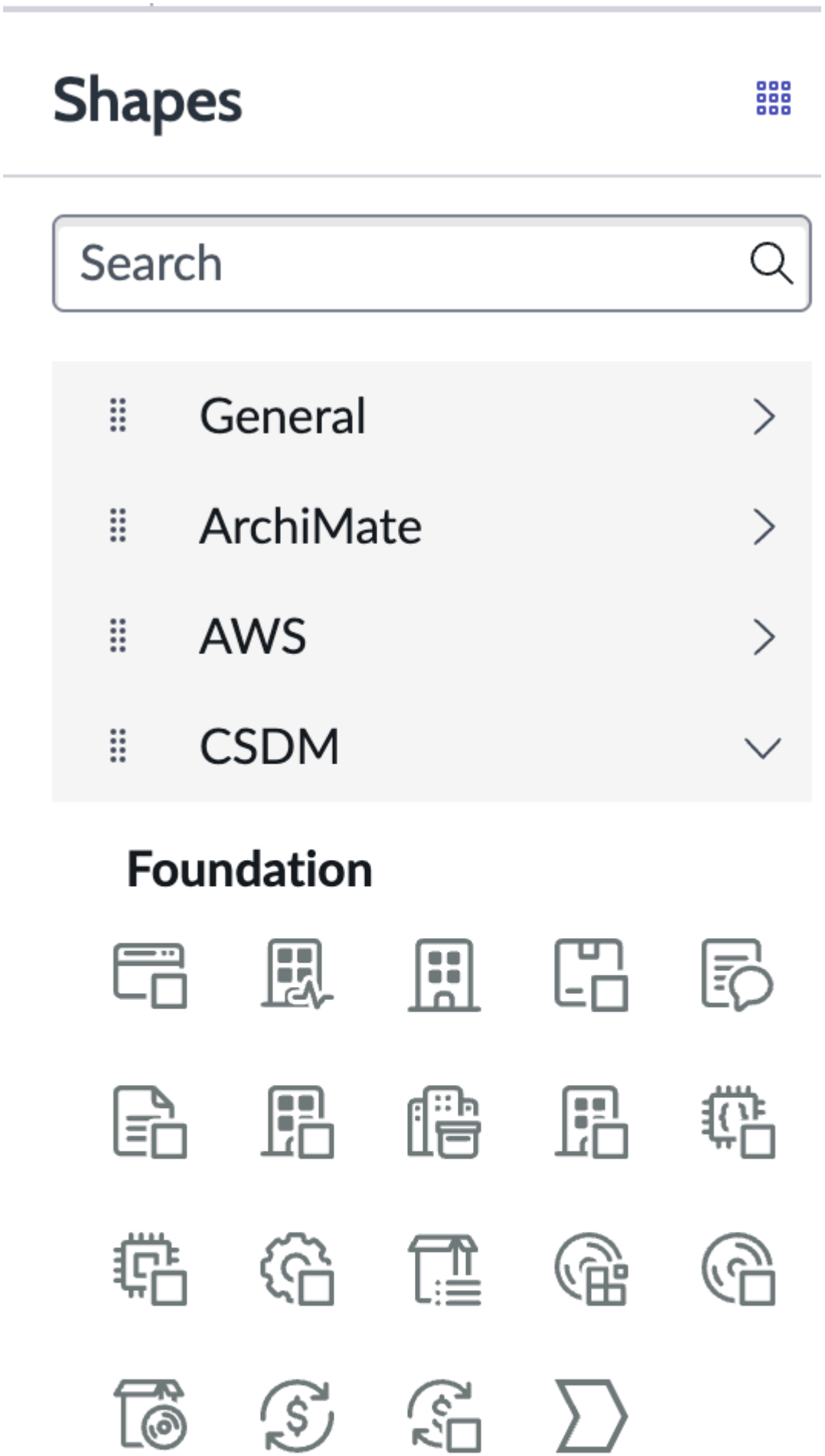

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Create a diagram using CSDM shapes

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 the custom shapes to the shape library, you can define actions that you want to associate with each custom shape that you have created. Diagram actions can 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, create diagram action for the image or shape, create a custom shape library, add shape to the shape library, create a shape library element, and 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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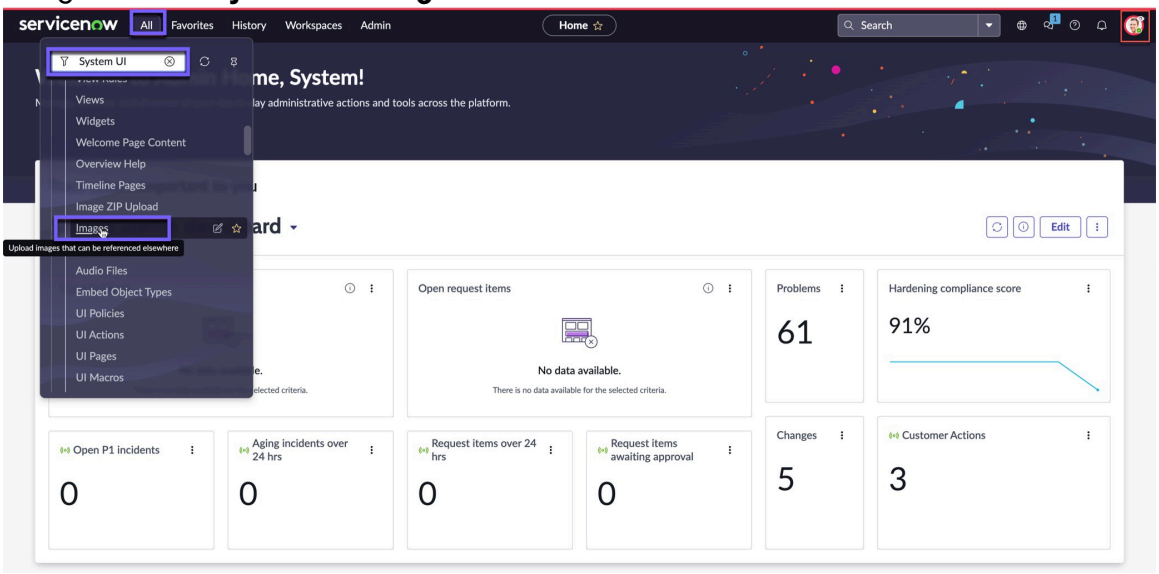
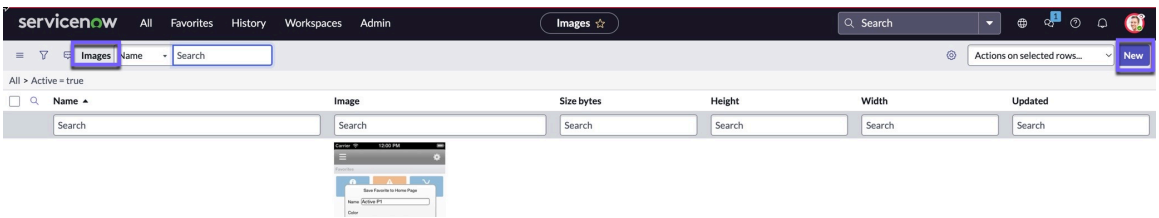
Procedure

1. Upload the image or shape to the database.

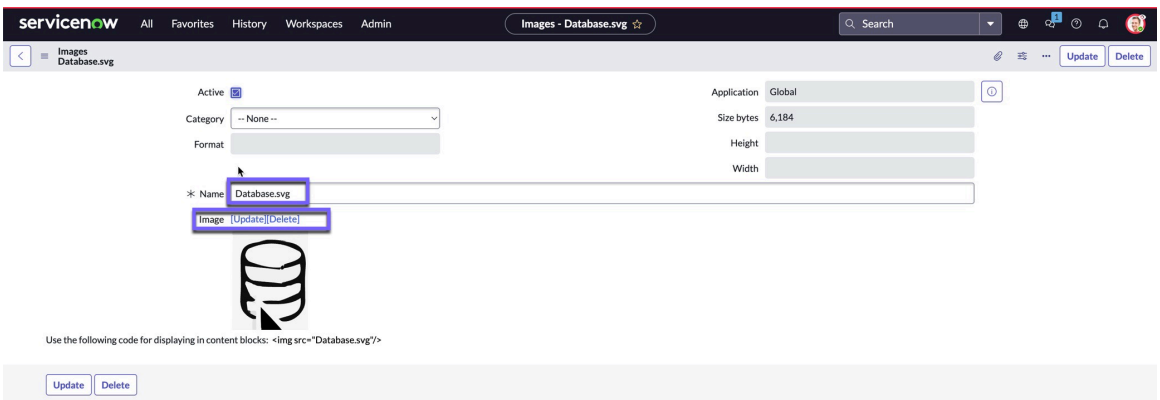
   a. Navigate to **All** > **System UI** > **Images**.



   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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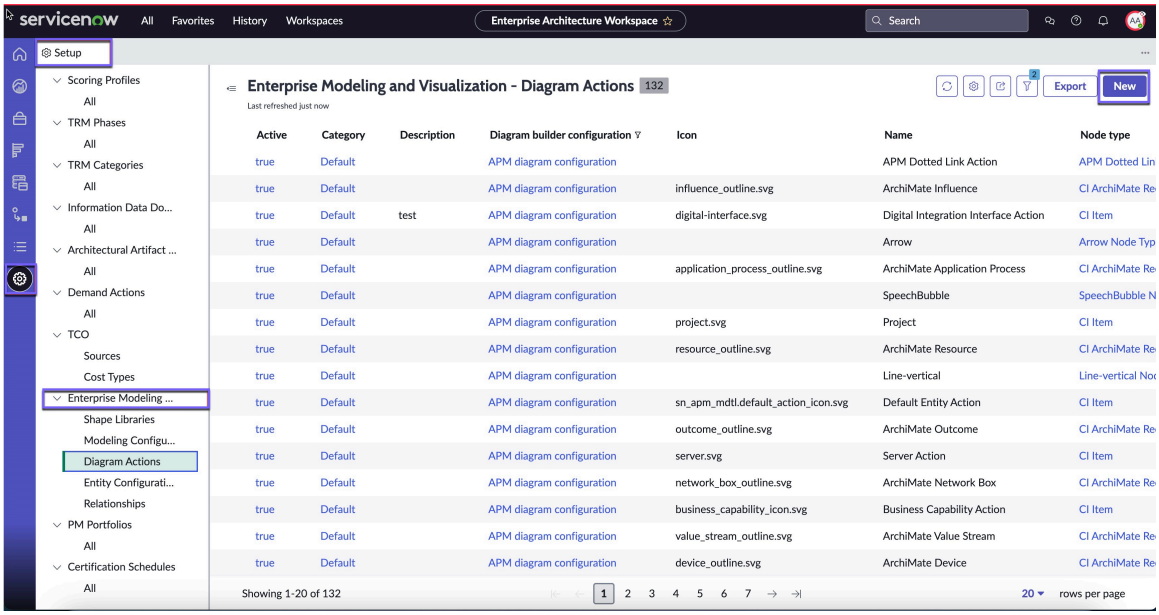
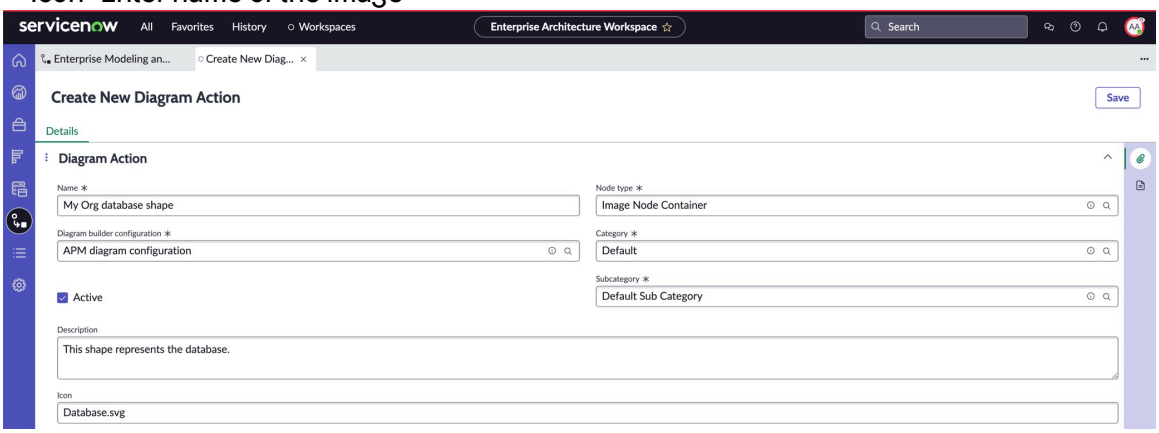


c. Select New to create a diagram action for the image (Database.svg).

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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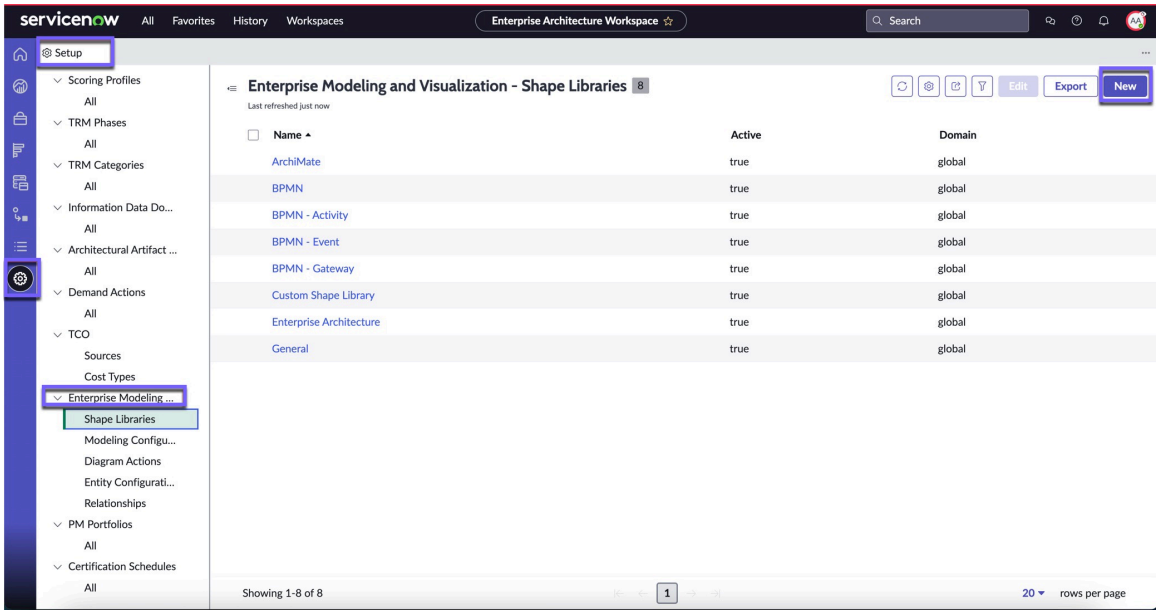
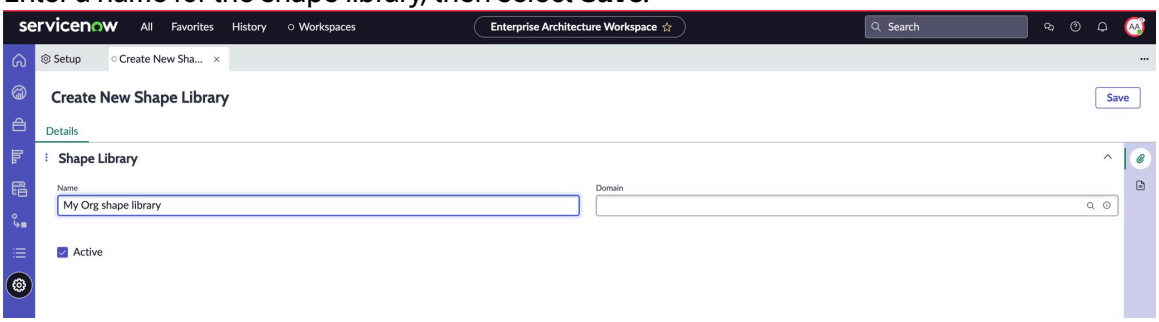
a. As an APM Admin user, navigate to **Setup** > **Enterprise Modeling and Visualization** > **Shape Libraries**.



b. Select **New**.

c. Enter a name for the shape library, then select **Save**.

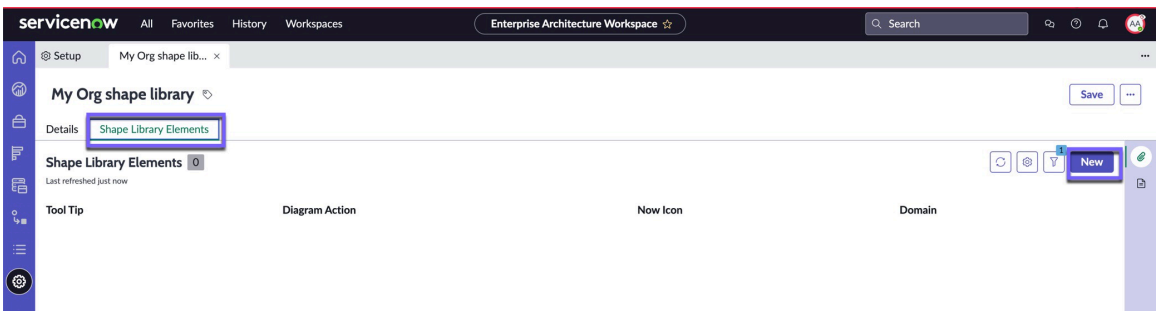


6. Add a shape library element to associate the shape and its diagram action to the shape library.

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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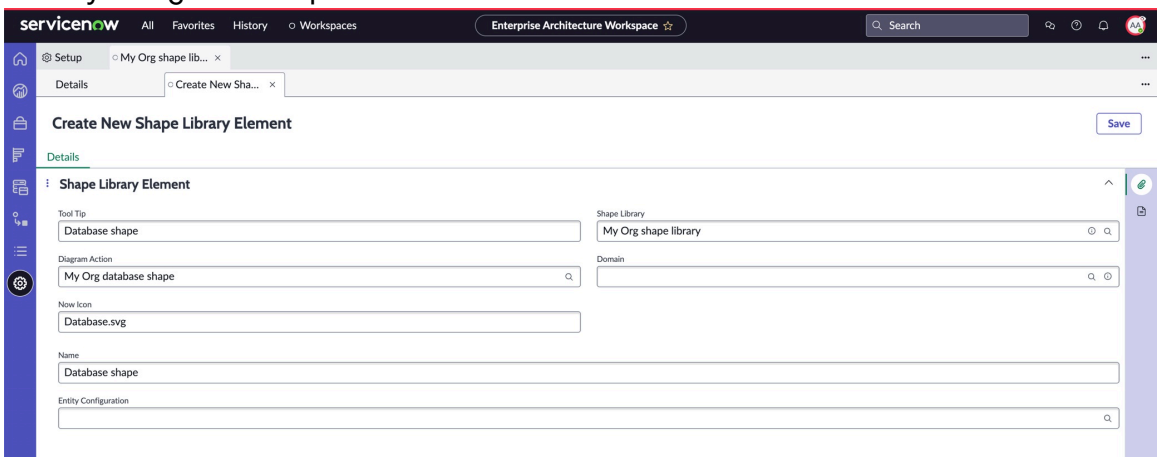
- Tool tip- Enter text that you want to see on hovering the image.
- Diagram action- Select the diagram action that you have created in the previous step.
- Now icon- Enter the name of the shape or image.
- Name- Enter a name for the shape to be displayed in the Enterprise Modeling and Visualization application.
- Shape library- This field is automatically selected.
- Domain- Optional field.
- Entity configuration- Optional field.

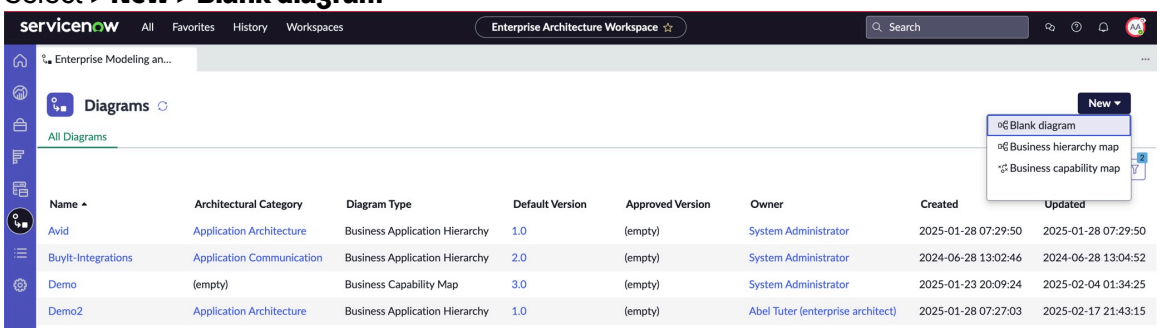


e. Select **Save**.

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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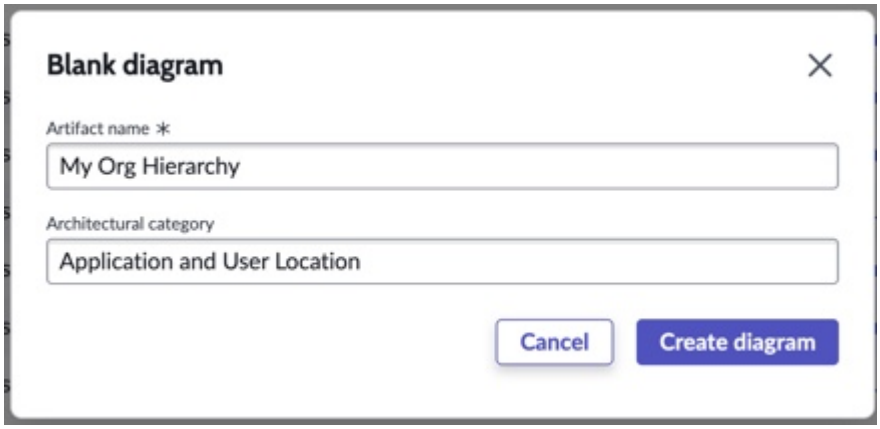
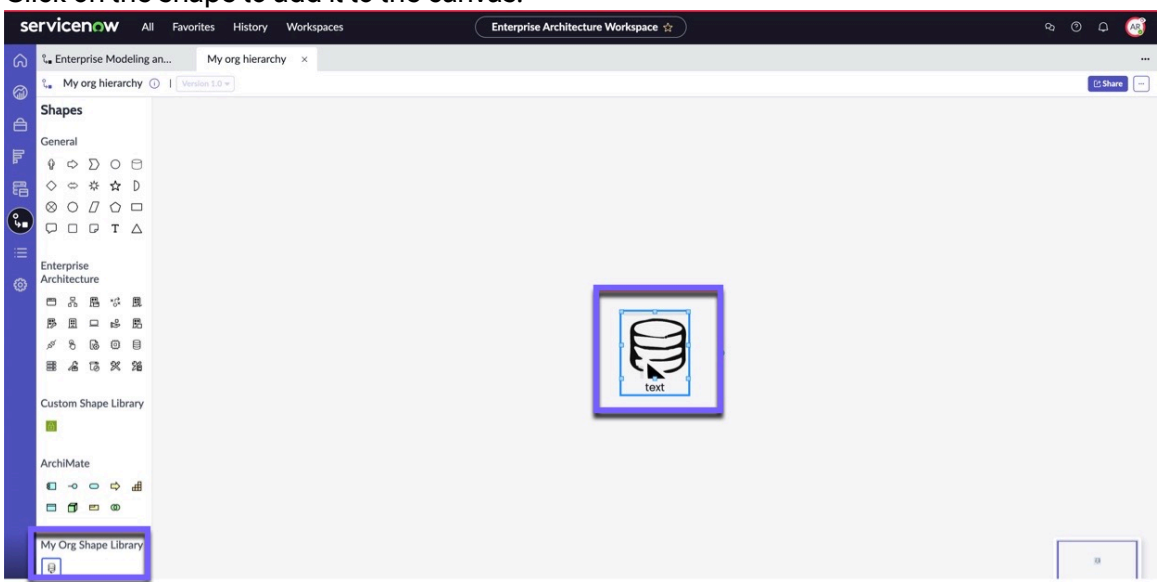


Observe that the shape library that you created appears in the Shapes pallet. It contains the shape that you uploaded.

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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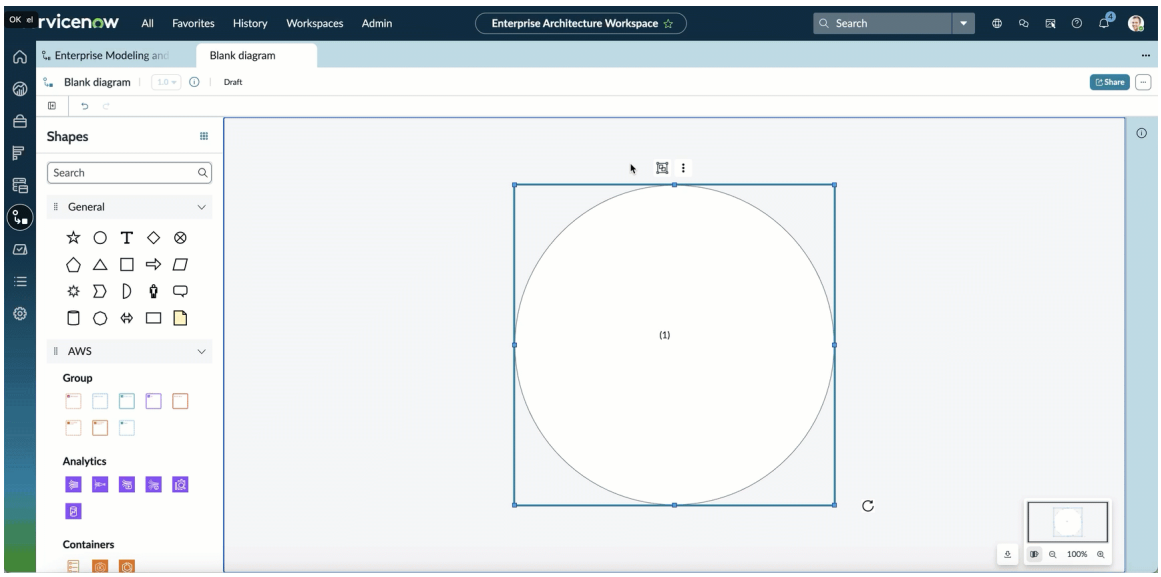
Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Modeling page by selecting the Modeling 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 Modeling 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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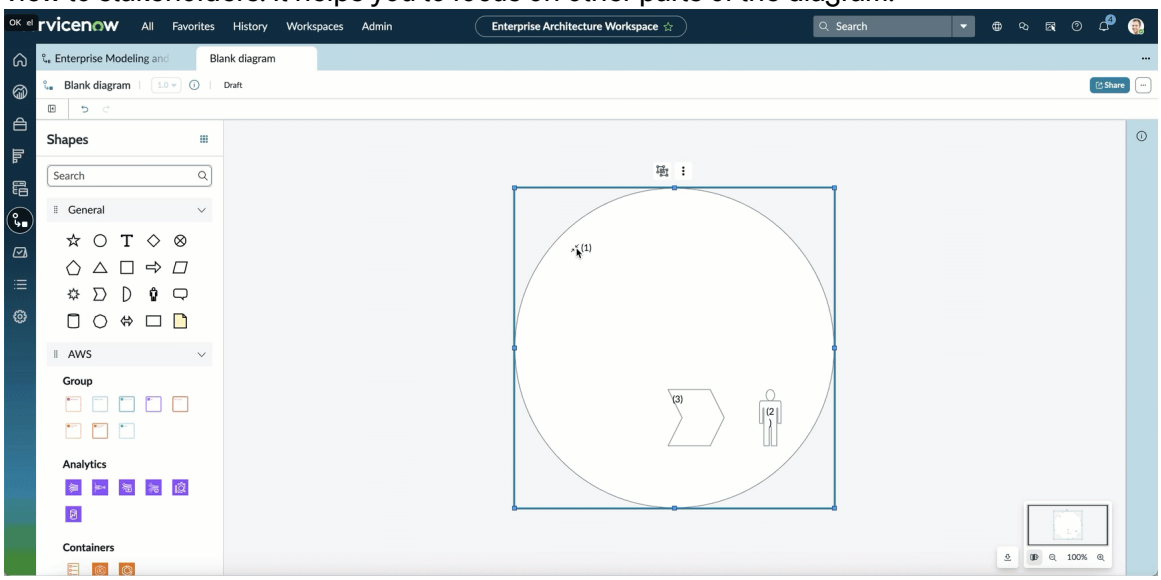
Expanding a shape helps in analyzing dependencies or editing details inside a group. Collapsing a group shape helps in presenting a high-level architecture view to stakeholders. It helps you to focus on other parts of the diagram.



Download a modeling diagram as an image

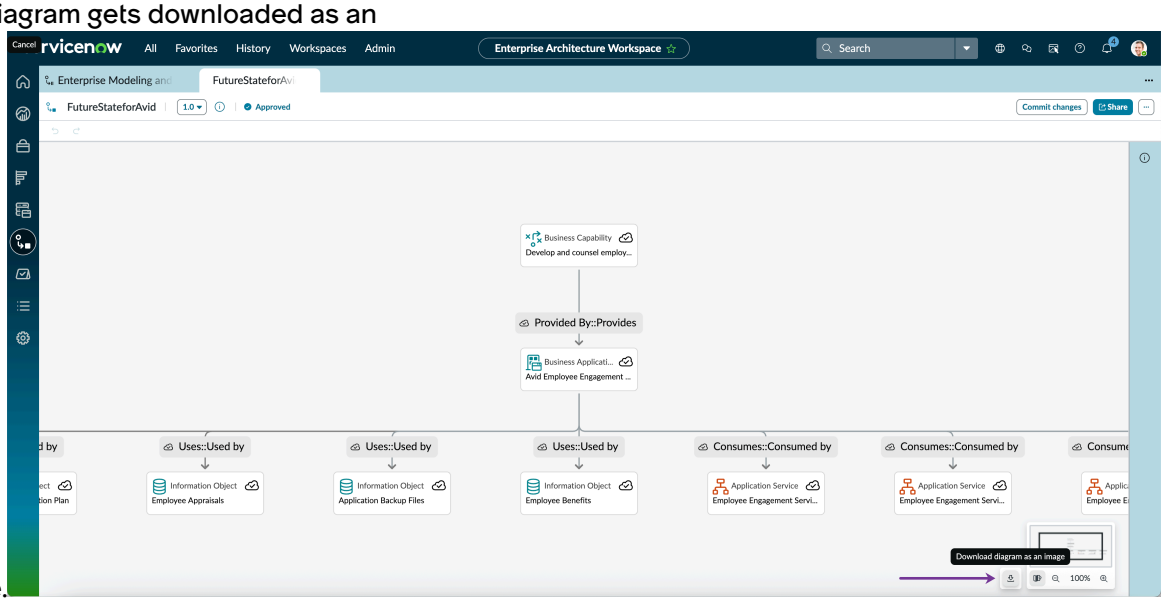
Download a diagram as an image to share it with other stakeholders with offline access or use it in the presentations.

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 Modeling 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

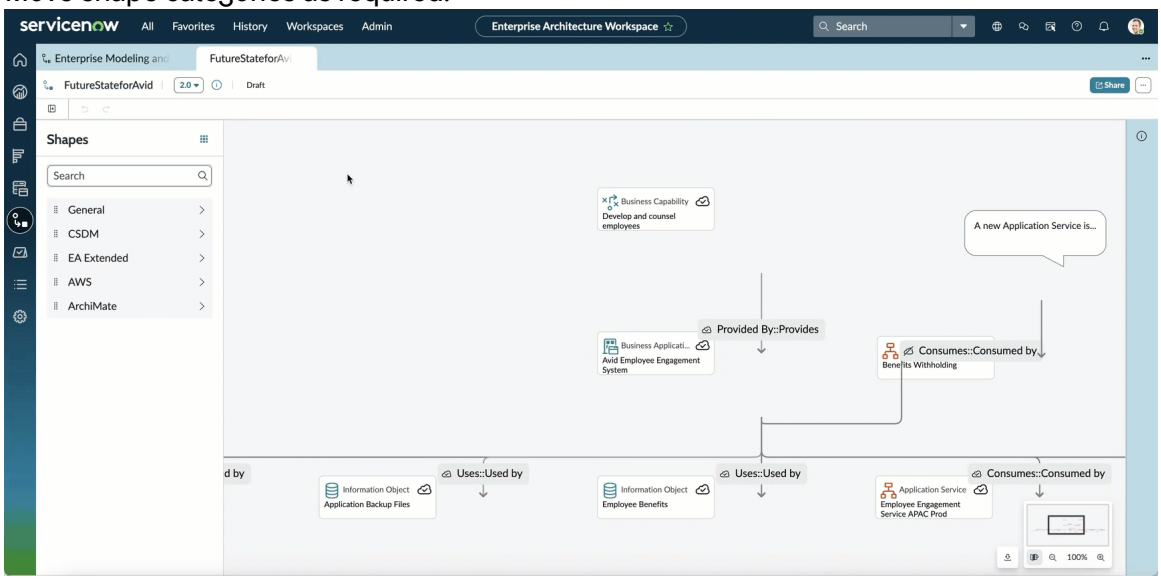
Reordering shape categories helps architects customize the panel for faster access to frequently used shapes.

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 Modeling 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

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 ( ).
3. Select an existing diagram.
4. On the canvas, select two or more shapes that you want to align.

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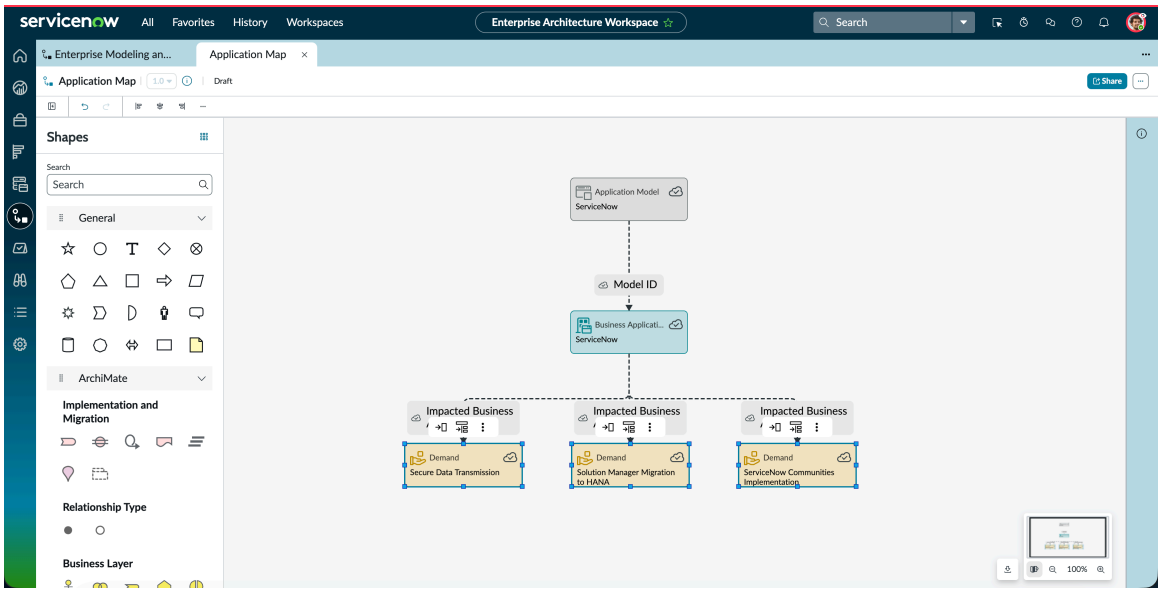
Note: If only one shape is selected, the alignment options are inactive.

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

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.

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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

Show or hide shapes panel
Show or hide the Shapes Panel to optimize your workspace for different tasks.

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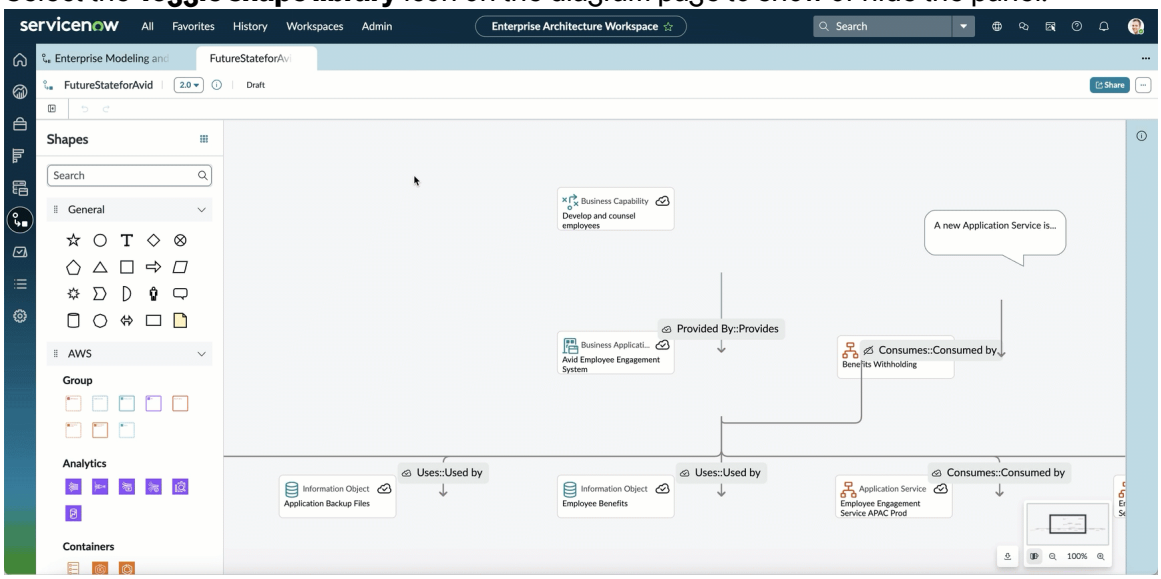
Before you begin
Role required: sn_apm.apm_user

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 Modeling 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 Modeling icon ( ).
3. Create a new diagram or open an existing diagram.

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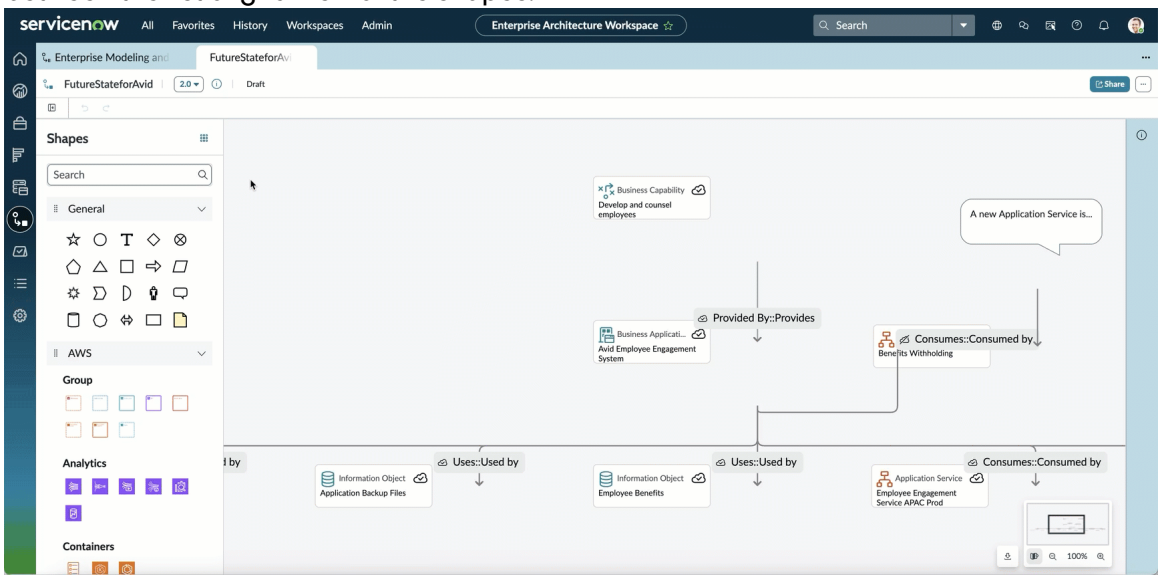
4. Select the **Switch to list view** or **Switch to grid view** icon on the diagram page to switch between the list or grid view of the shapes.



Search shapes in a diagram

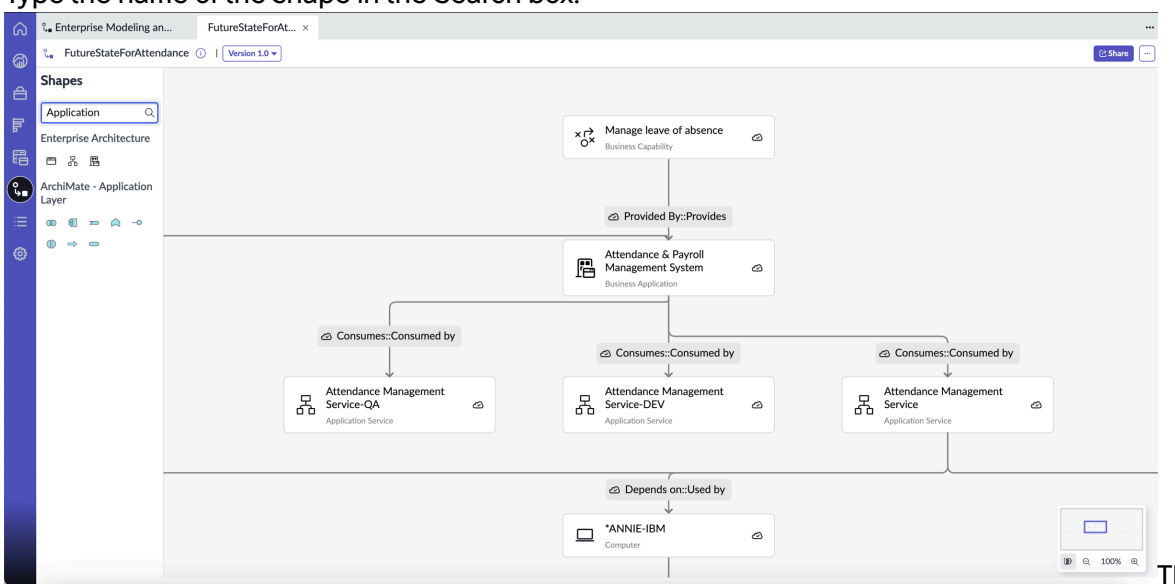
Search for a shape in the Shapes palette of a diagram.

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 Modeling 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

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 and then the More Actions 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 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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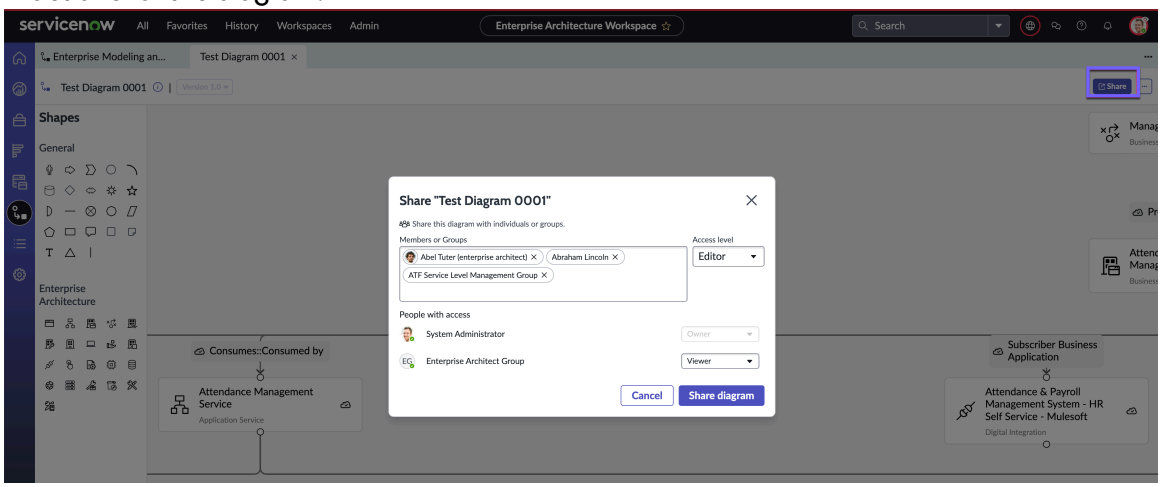
- **Owner**: With this access, you can edit the diagram, share the diagram, and modify access levels for other users (except for the actual owner of the diagram).
- **Editor**: With this access, you can edit the diagram, share the diagram with Editor or Viewer access for other users, and modify access 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 a business capability or business application to the 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 Modeling 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 a business capability or business application to the 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 Modeling 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 a business capability or business application to the 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

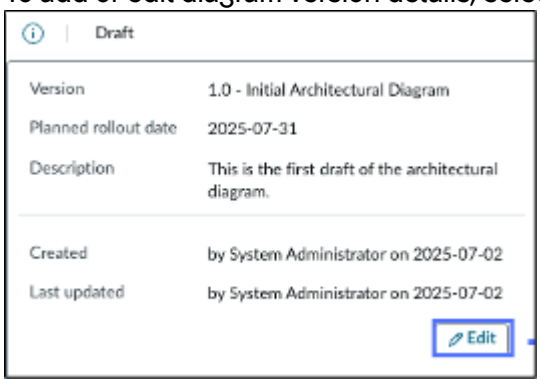
You can add or edit version-specific details for a diagram to improve change management and compliance. Adding diagram version details ensures better clarity between all stakeholders in the context of the diagram and timelines.

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 a business capability or business application to the 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 Modeling 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 a business capability or business application to the 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 Modeling 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 a business capability or business application to the 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 Modeling 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 a business capability or business application to the 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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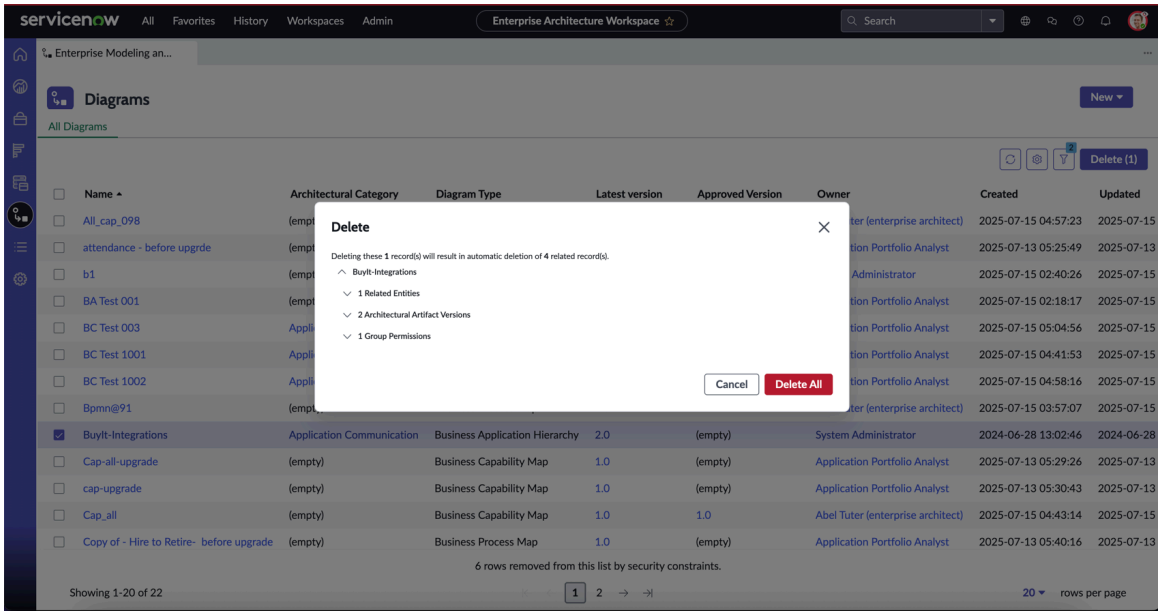


4. Select **Delete All**.

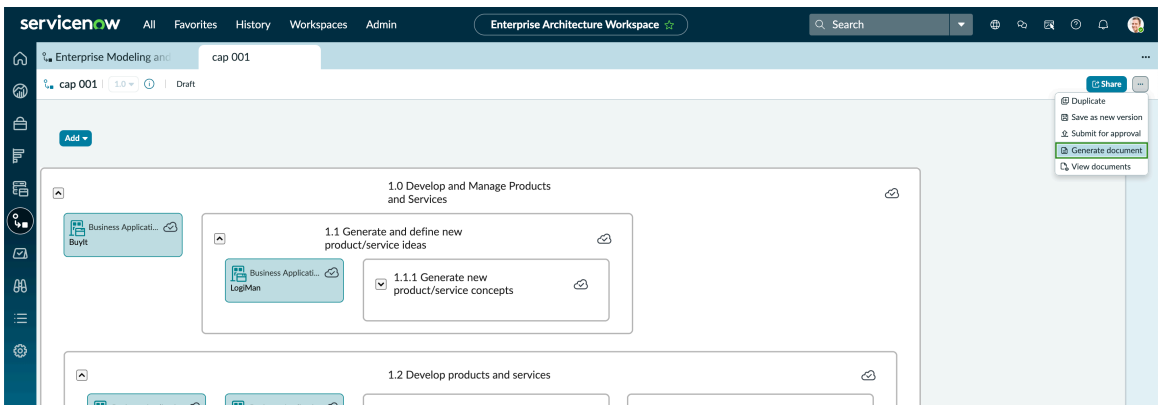
Result
The diagram is deleted from the All Diagrams page.

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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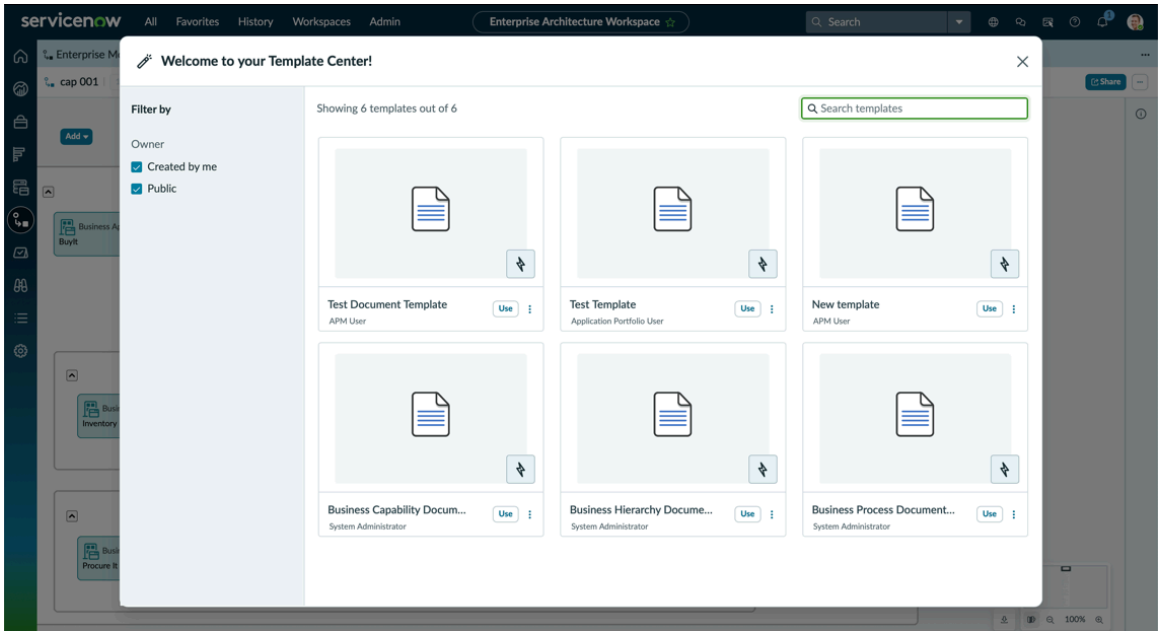

7. Enter a name for the document.
8. Select **Create**.
   A confirmation message appears with a link to the newly created document. You can select the link to open the document.

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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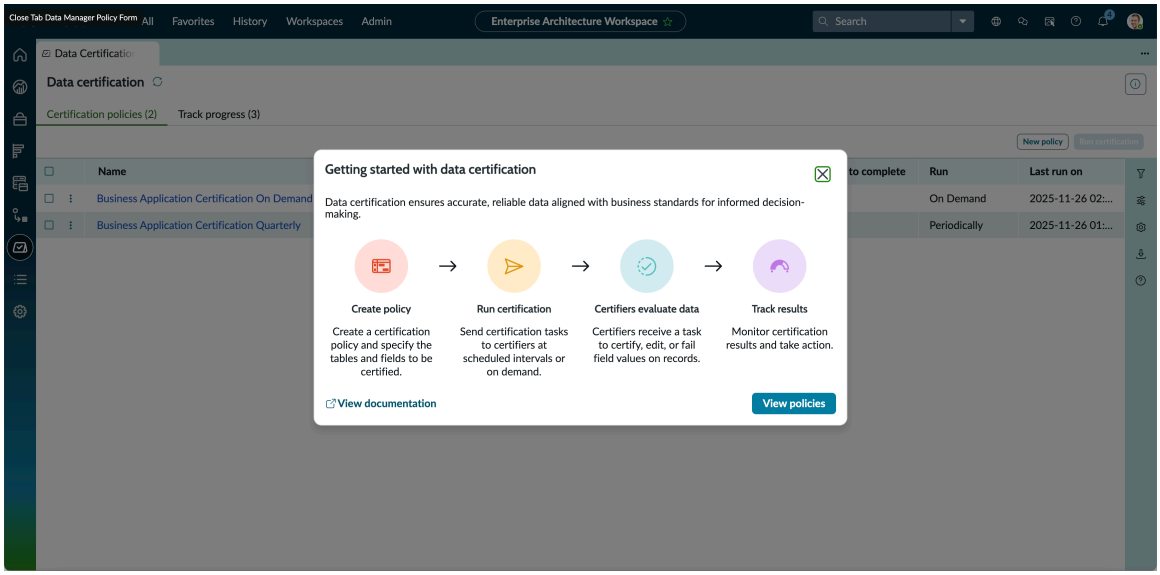
standards), automate recurring checks (daily, monthly, quarterly), assign certifiers to review and approve data. You can highlight overdue certifications and compliance gaps.



Action and required role mapping for certification policies in the Enterprise Architecture Workspace

Action	System admin	cmdb admin + analyst	com.snc_apm_analyst
View list of policies	Yes	Yes	Yes
View track progress	Yes	Yes	Yes
View policy by clicking a link to the policy	Yes	Yes	No
Create policy	Yes	Yes	No
Edit policy	Yes	Yes	No
Delete policy	Yes	Yes	Yes
Activate policy	Yes	Yes	Yes
Deactivate policy	Yes	Yes	Yes
Run certification	Yes	Yes	Yes
Complete certification through Track progress page	Yes	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

Role required: System admin, cmdb admin + 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 certification existing policy details. You can edit the draft or inactive certification policies.

Before you begin

Role required: System admin, cmdb admin + 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 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

View certification policy

View details of a published policy.

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Before you begin
Role required: admin

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: admin

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.

Related topics

- Deactivate a certification policy
- View certification policy

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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

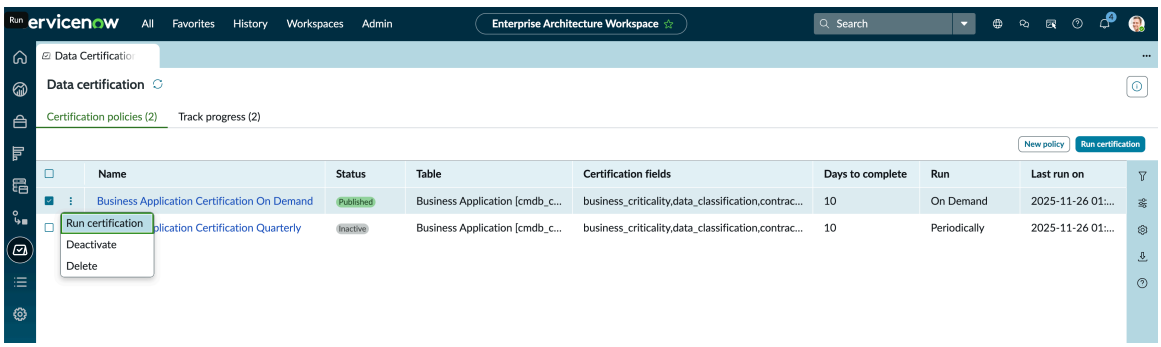
Run certification for published policies to generate a new certification instance for an active policy.

Before you begin

Role required: System admin, cmdb admin + analyst, com.snc_apm_analyst

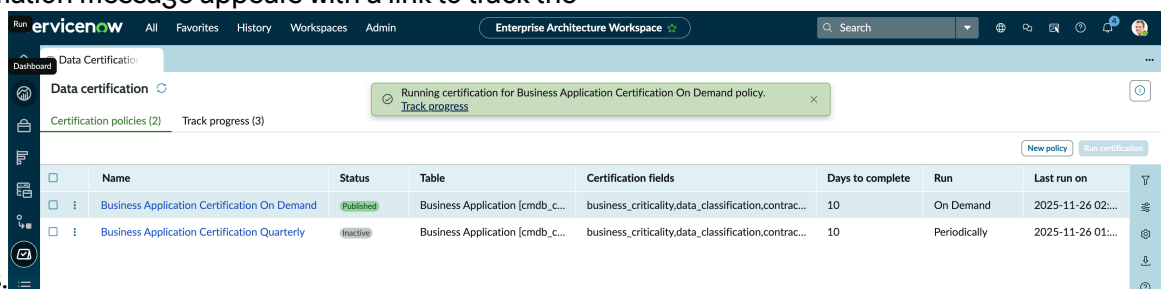
Procedure

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**.

   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

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Track progress of a certification policy

Create a certification policy

Activate a certification policy

Delete a certification policy

Track progress of a certification policy

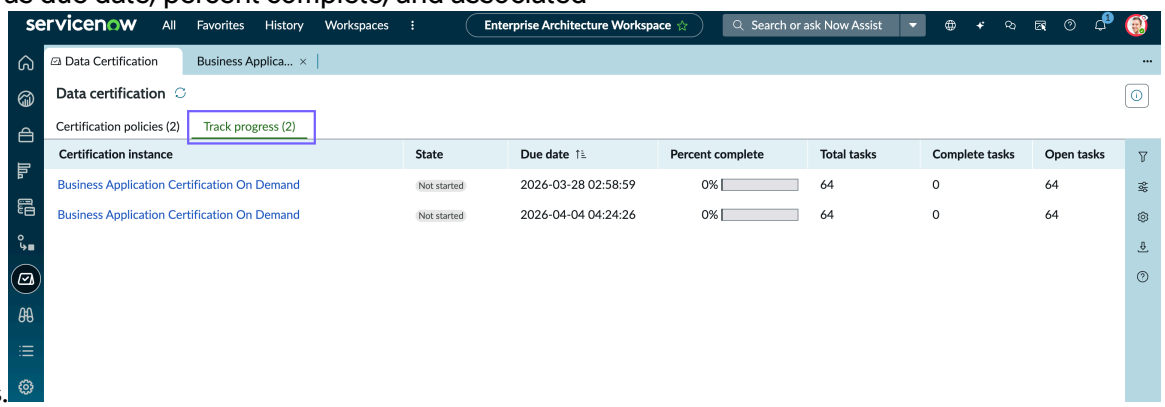
Monitor and review the certification policy status to track completion progress and view details such as total tasks, completed tasks, open tasks, and unassigned tasks.

Before you begin

Role required: System admin, cmdb admin + 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.
   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.

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: System admin, cmdb admin + analyst, com.snc_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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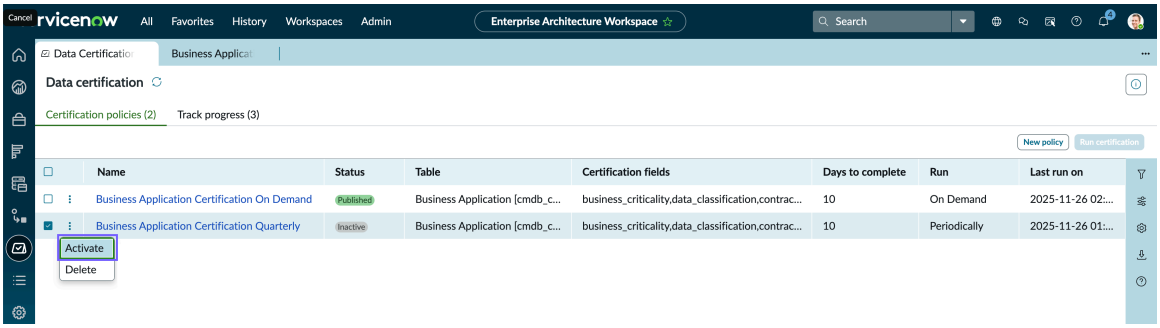
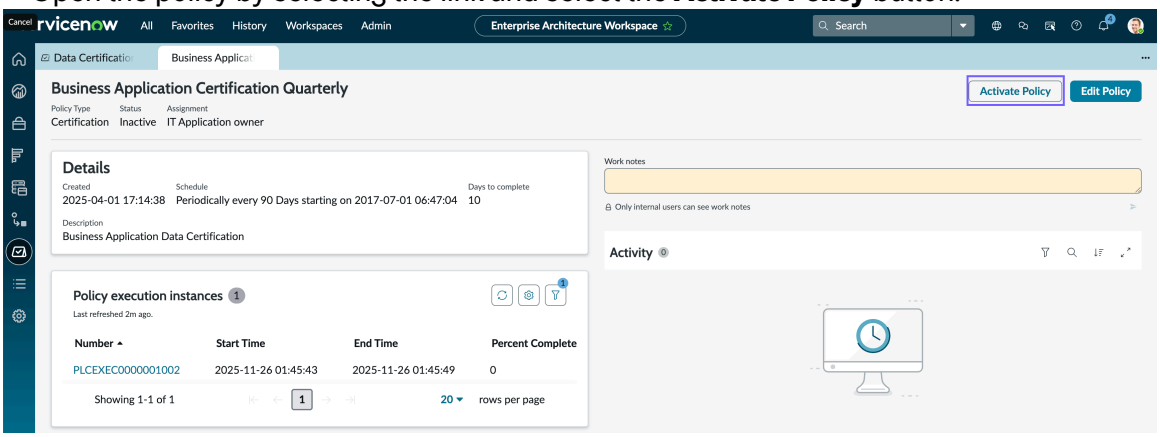


- Open the policy by selecting the link and select the **Activate Policy** button.



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: System admin, cmdb admin + analyst, com.snc_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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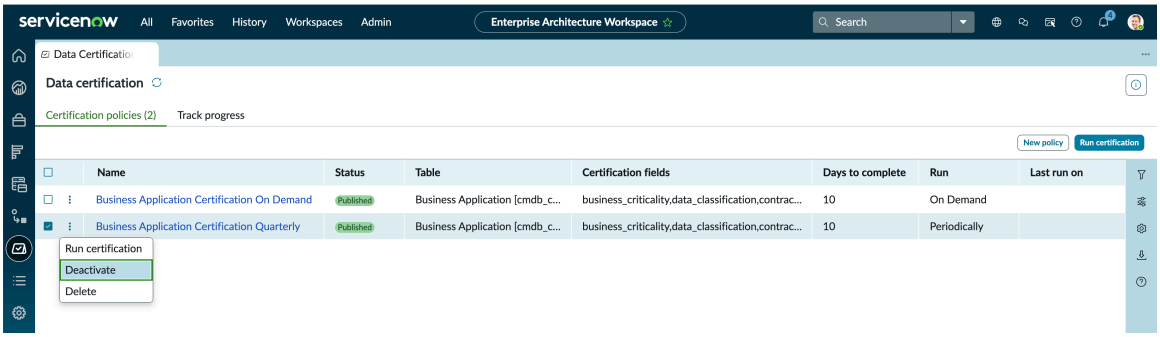
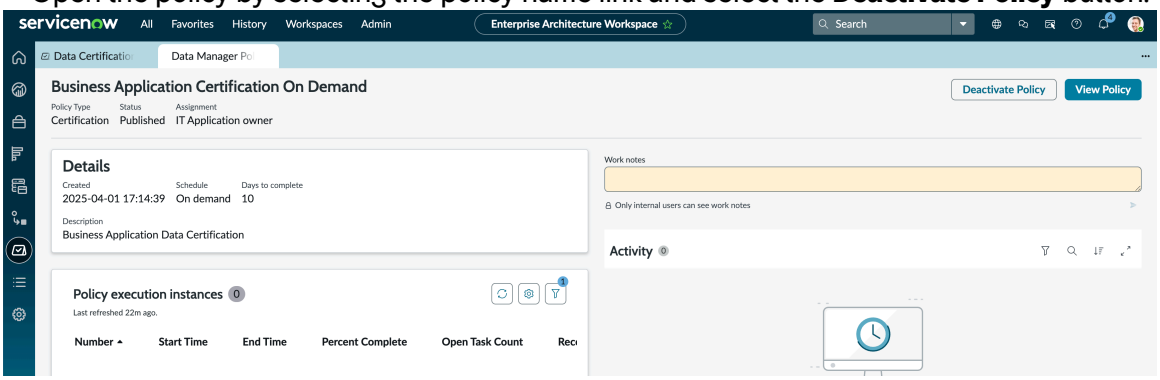


A confirmation message appears.

- 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: System admin, cmdb admin + analyst, com.snc_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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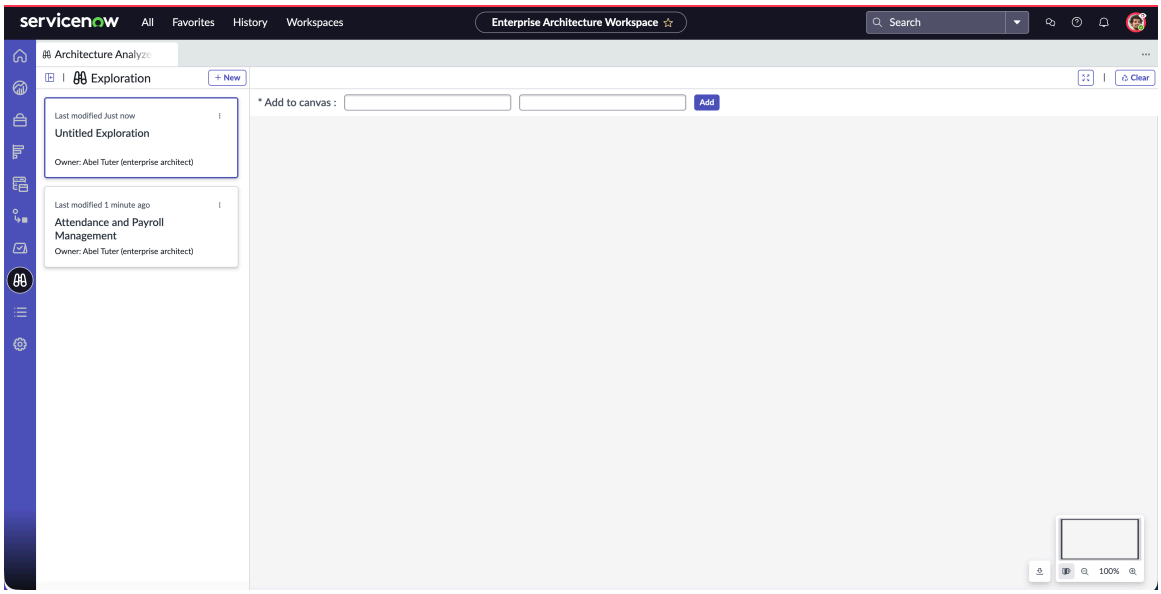
Procedure

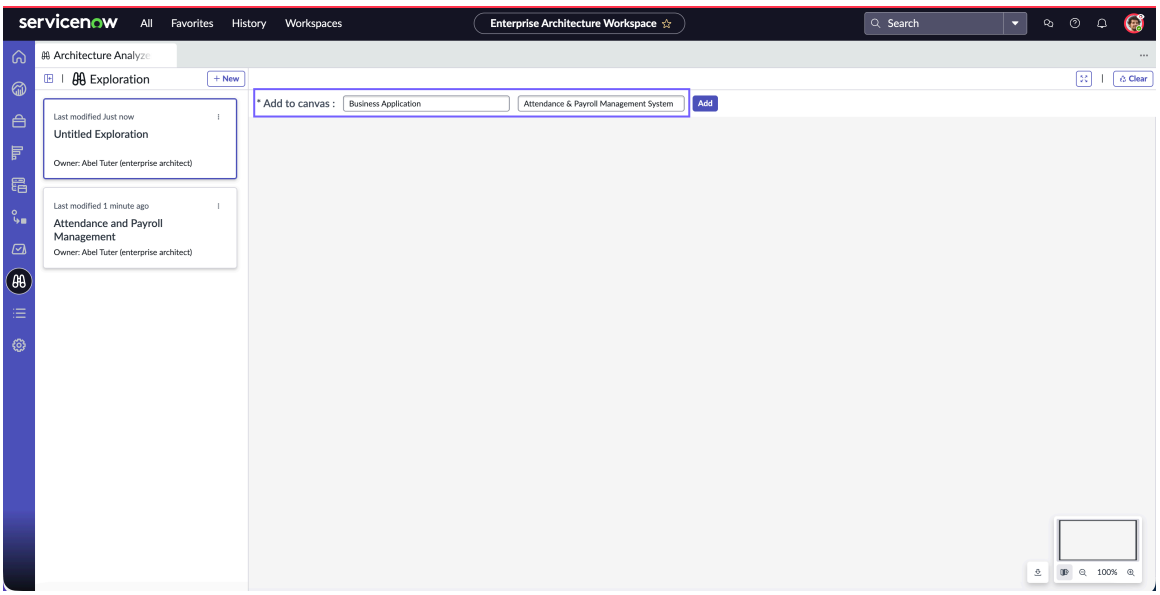
1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Architecture Analyzer page by selecting the architecture analyzer icon ( ).
3. Select **New** or select **+ New exploration**.
   An untitled exploration with an empty canvas is created.



Note:

- You can double click on an existing exploration and then select **+ New exploration** to create a new 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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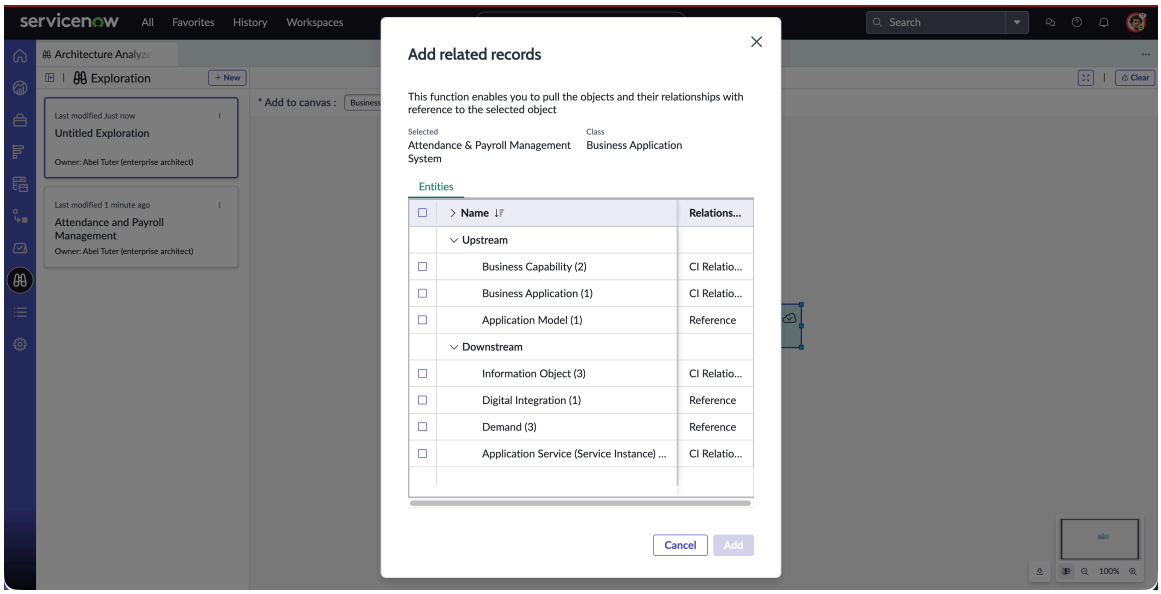
5. Select **Add**.
   The selected entity is displayed on the canvas.

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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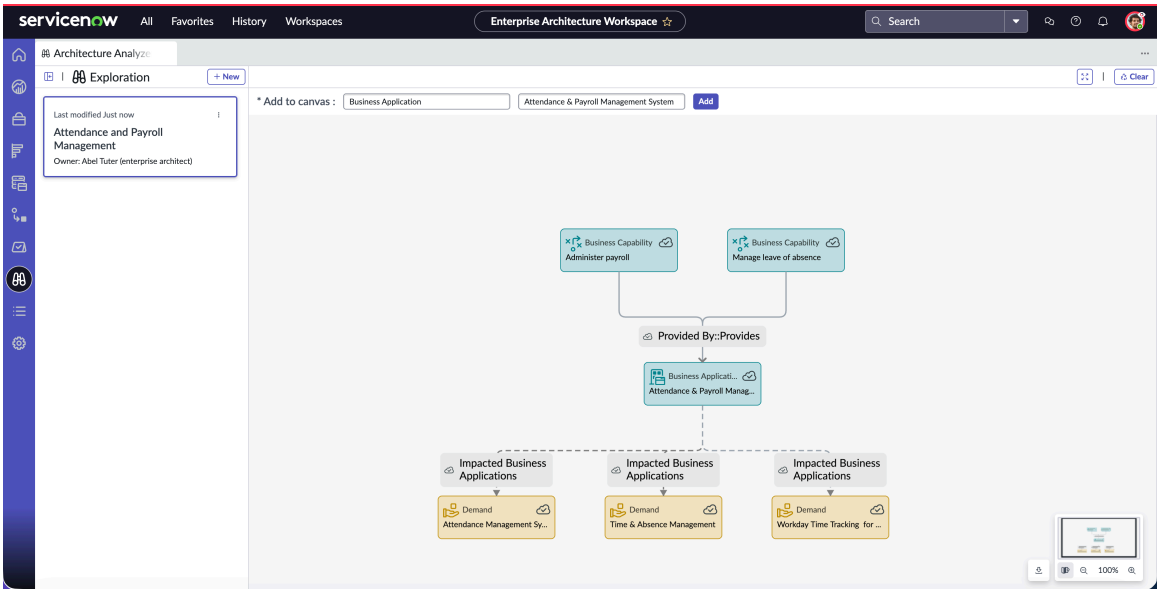

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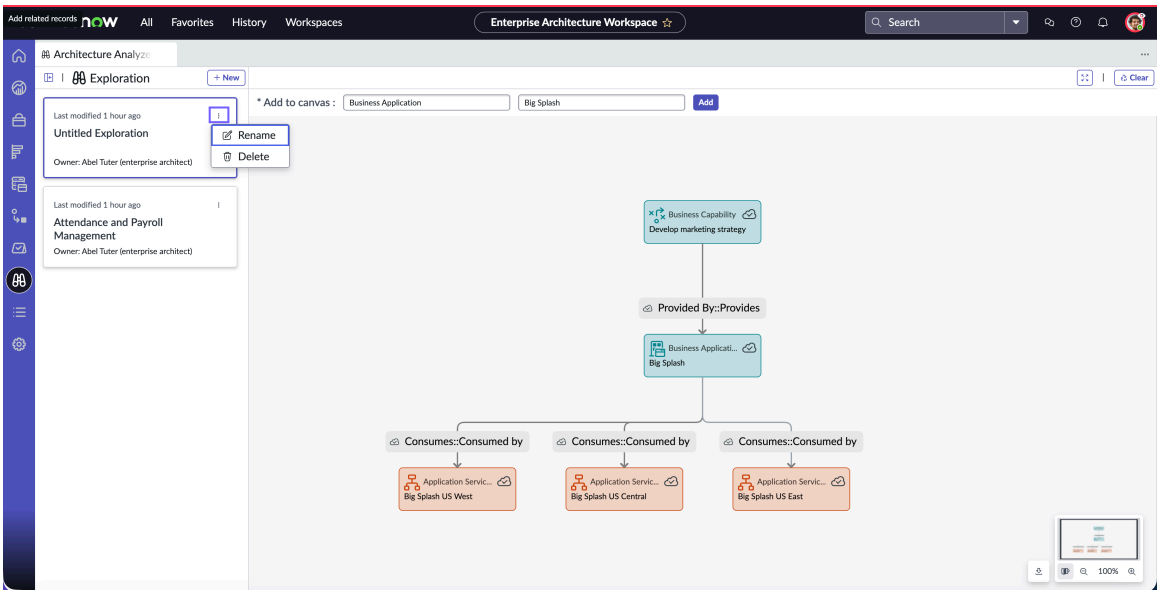
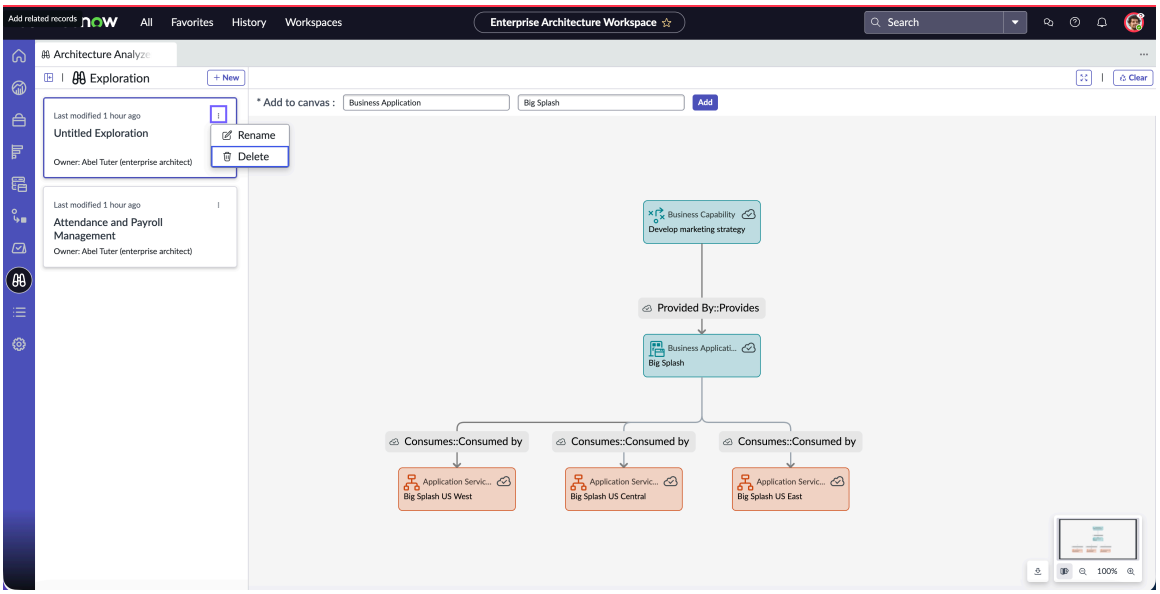
Note:

- 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

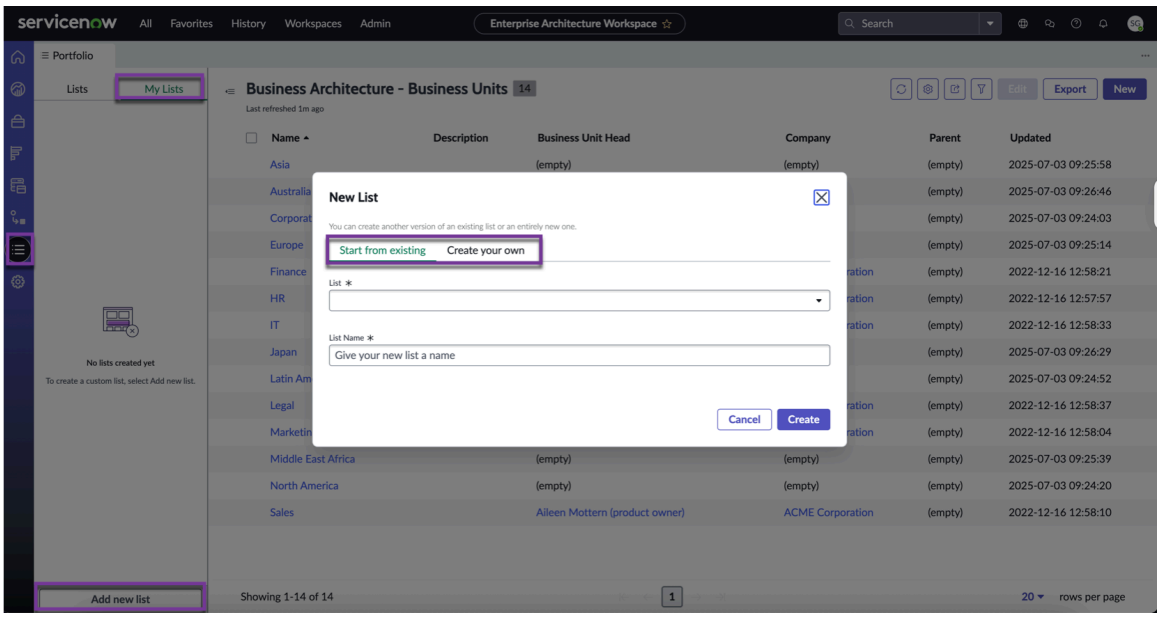
Create your own filtered lists in the Enterprise Architecture Workspace by defining filter conditions and sort criteria that control which records appear in the list and access them under the **My Lists** tab.

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.

  When creating a custom list, you can combine multiple filter conditions using AND or OR. These options control how records are included in the list. Use AND when all conditions must be true for a record to appear in the list. Use OR when any one of the conditions can be true for a record to appear in the list.

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.

Related topics

Exploring business units

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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

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.

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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 **Departments**.

Related topics
Add or edit a department

Add a user to a department

Add or edit a department
You can create or edit departments to effectively manage and optimize business applications by providing a structured approach to align the business applications with the strategic goals of the organization.

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. 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

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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. 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.

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

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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 **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**.

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

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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**.
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.

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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

Manage with 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.

Related topics

Exploring value streams

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.

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Related topics

- Add or edit a value stream
- Add value stream stages to a value stream
- Add 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 .
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 or remove a business process from a value stream stage
- Add 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 and establish 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.

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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

Add 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.

Before you begin

You require the Value stream artifacts (sn_value_stream) plugin to work with value streams in the Enterprise Architecture Workspace.

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 a 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

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.

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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.

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.

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- 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**.

Related topics

View value stream stage details

Add or remove a business process from 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 a business capability from a value stream stage

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Add or remove a business capability 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

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

Add or remove a business process from 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.

Related topics

Exploring product capabilities

View all business capabilities on the Portfolio page

You can view the list of all available capabilities in the Enterprise Architecture Workspace.

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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 **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 in EA 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

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 .
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.

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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 in EA Workspace
- 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**.
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.

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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 in EA 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

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.
6. Select the more actions menu and select **Create Diagram**.
7. On the Create Diagram form, fill in the fields.

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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 in EA Workspace
- 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 in EA Workspace

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.
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**.

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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 associated with 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.

Related topics

- Exploring value stream stages
- Exploring business capabilities

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View value stream stage details

Add or remove a business capability from a value stream stage

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

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.

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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**.

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

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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. 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

Add or remove a business process from a value stream stage

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.

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

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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 **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

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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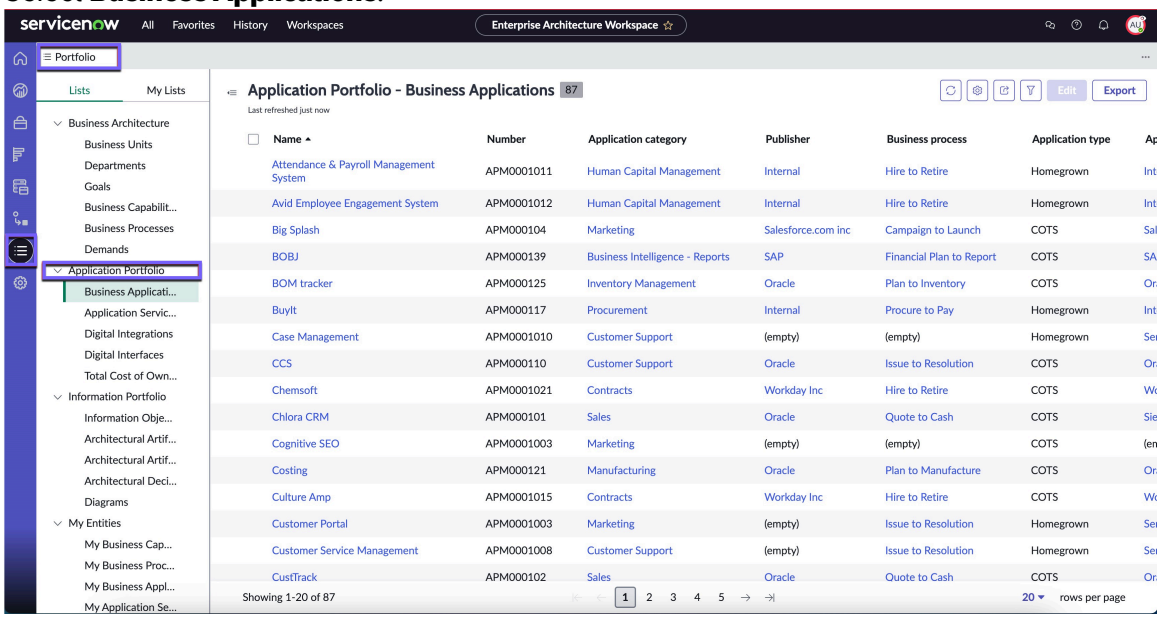
4. Select **Business Applications**.



Related topics

- Add or edit a business application
- View business capabilities associated with a business application
- Add an existing business capability to a business application
- Remove business capabilities associated with a business application
- Create a diagram for a business application in the EA Workspace
- Create a Lucidchart diagram for a business application in the EA Workspace
- 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 of a business application in EA Workspace
- View architectural artifacts associated with a business application
- Create an architectural artifact and associate it with a business application
- Add an existing architectural artifact to a business application
- Remove architectural artifacts associated with a business application

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.

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Note: To approve or reject the requests, you must be part of the Business Application Registration Approval Group.

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 associated with a business application
- Manage information objects of a business application in EA Workspace
- Remove architectural artifacts associated with a business application
- Create an architectural artifact and associate it with a business application
- View architectural artifacts associated with a business application
- Remove business capabilities associated with 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 in the EA Workspace
- Add an existing architectural artifact to a business application
- Create a diagram for a business application in the EA Workspace
- Add an existing business capability to a business application

View business capabilities associated with a business application

You can view the list of business capabilities associated with business applications in the Enterprise Architecture Workspace, to understand the value of the business application in your enterprise architecture landscape and improve decision making.

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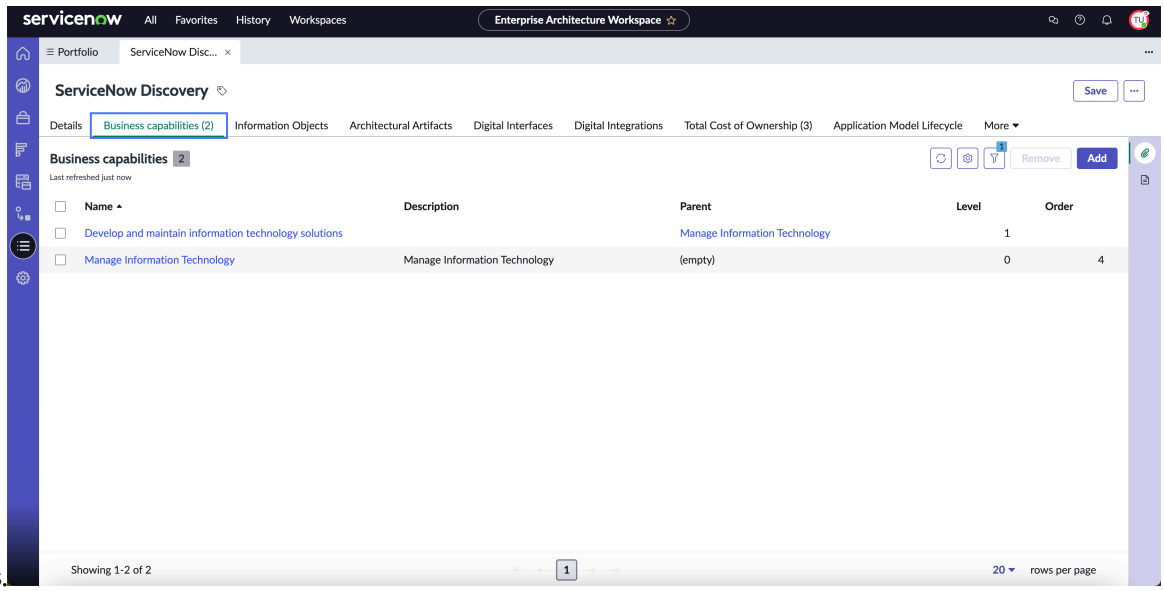
Before you begin

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 **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 of a business application in EA Workspace
- Remove architectural artifacts associated with a business application
- Create an architectural artifact and associate it with a business application
- View architectural artifacts associated with a business application
- Remove business capabilities associated with 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 in the EA Workspace
- Add an existing architectural artifact to a business application
- Create a diagram for a business application in the EA Workspace
- Add an existing business capability to a business application

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Add an existing business capability to a business application

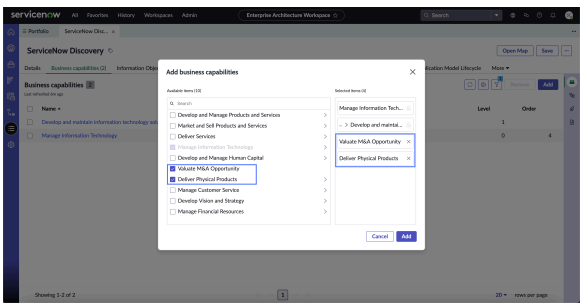
You can add existing business capabilities to business applications in the Enterprise Architecture Workspace, to ensure better alignment with your strategic enterprise architecture goals.

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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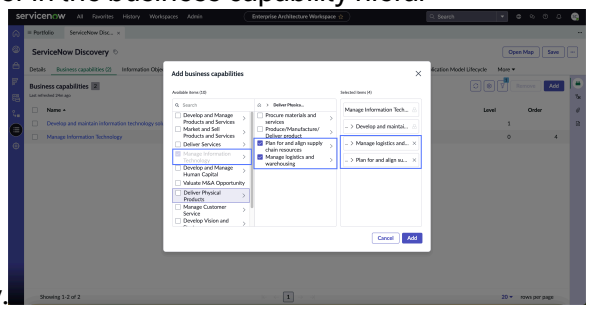
Options	Steps
	view more sub capabilities that are lower in the business capability hierarchy. 

9. Select **Save**.

Related topics

- View roadmap of a business application
- View business capabilities associated with a business application
- Add or edit a business application
- Manage information objects of a business application in EA Workspace
- Remove architectural artifacts associated with a business application
- Create an architectural artifact and associate it with a business application
- View architectural artifacts associated with a business application
- Remove business capabilities associated with 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 in the EA Workspace
- Add an existing architectural artifact to a business application
- Create a diagram for a business application in the EA Workspace
- View all business capabilities on the Portfolio page

Remove business capabilities associated with 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 associated with a business application
- View roadmap of a business application
- View business capabilities associated with a business application
- Add or edit a business application
- Manage information objects of a business application in EA Workspace
- Create an architectural artifact and associate it with a business application
- View architectural artifacts associated with 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 in the EA Workspace
- Add an existing architectural artifact to a business application
- Create a diagram for a business application in the EA Workspace
- Add an existing business capability to a business application

Create a diagram for a business application in the EA Workspace

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 in the EA Workspace
- View roadmap of a business application
- View business capabilities associated with a business application
- Add or edit a business application
- Manage information objects of a business application in EA Workspace
- Remove architectural artifacts associated with a business application
- Create an architectural artifact and associate it with a business application
- View architectural artifacts associated with a business application
- Remove business capabilities associated with 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 existing architectural artifact to a business application
- Add an existing business capability to a business application

Create a Lucidchart diagram for a business application in the EA Workspace

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 in the EA Workspace.

   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 in the EA Workspace

View roadmap of a business application

View business capabilities associated with a business application

Add or edit a business application

Manage information objects of a business application in EA Workspace

Remove architectural artifacts associated with a business application

Create an architectural artifact and associate it with a business application

View architectural artifacts associated with a business application

Remove business capabilities associated with 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 existing architectural artifact to a business application

Add an existing 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 of a business application in EA Workspace

View architectural artifacts associated with a business application

Create an architectural artifact and associate it with a business application

Add an existing architectural artifact to a business application

Remove architectural artifacts associated with a business application

Create a Lucidchart diagram for a business application in the EA Workspace

Create a diagram for a business application in the EA Workspace

Remove business capabilities associated with a business application

Add an existing business capability to a business application

View business capabilities associated with 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

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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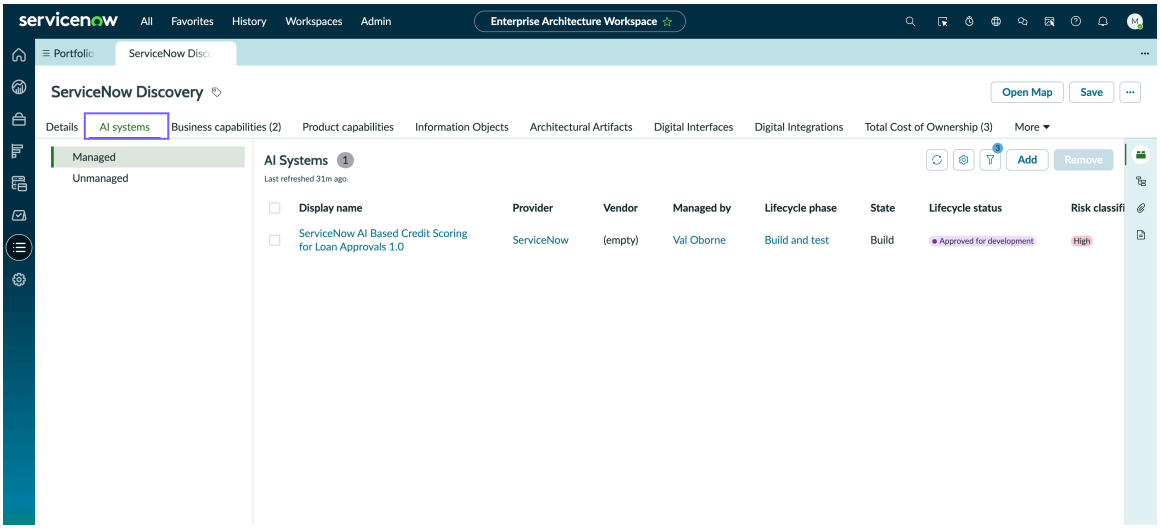

The association also appears under **Workspaces** > **AI Control Tower** > **AI Assets** > **AI systems** > **Select an AI system** > **Details** > **Business applications**.

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. To review the complete governance details of an AI system — such as its related models, datasets, prompts, approval history, and lifecycle tasks— you can open the full AI system record in the AI Control Tower workspace.

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, along with related assets such as 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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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.

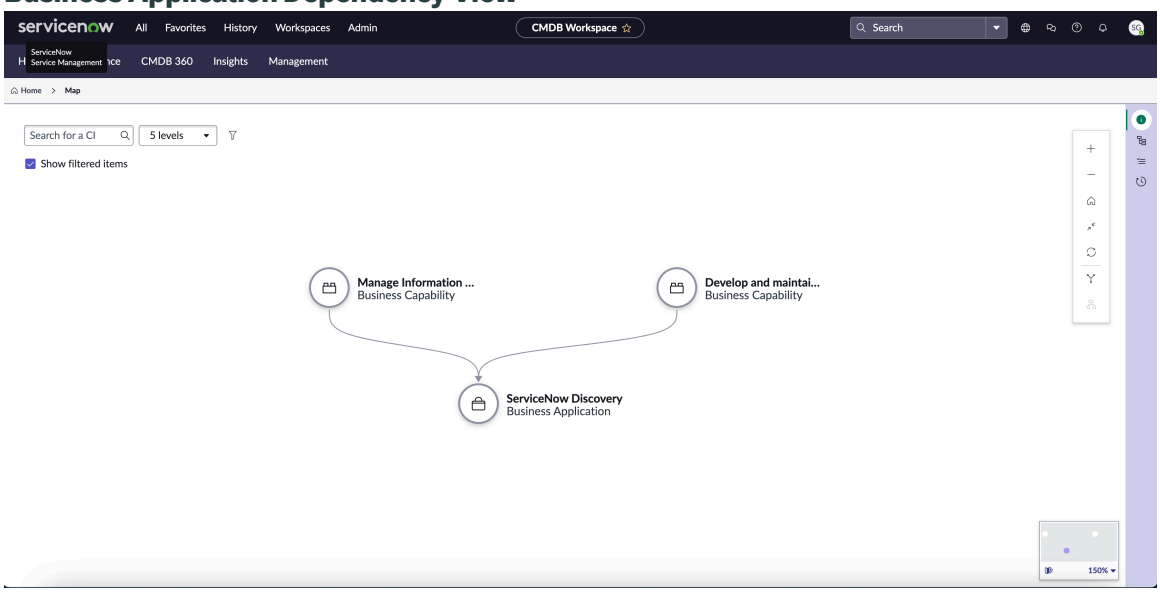
Procedure

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.

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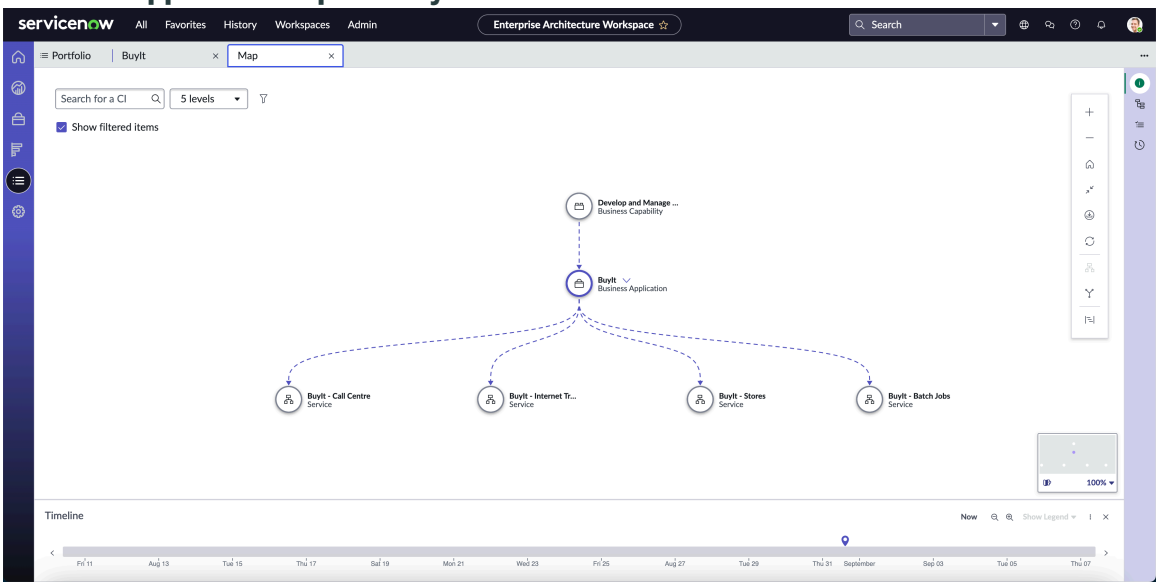
Business Application Dependency View



Related topics

- View roadmap of a business application
- Manage information objects of a business application in EA Workspace
- Create an architectural artifact and associate it with a business application
- Remove architectural artifacts associated with a business application
- View architectural artifacts associated with a business application
- Open business application form in Core UI from EA Workspace
- Add an existing architectural artifact to a business application
- Create a Lucidchart diagram for a business application in the EA Workspace
- Create a diagram for a business application in the EA Workspace
- Remove business capabilities associated with a business application
- Add an existing business capability to a business application
- View business capabilities associated with 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. Using the 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

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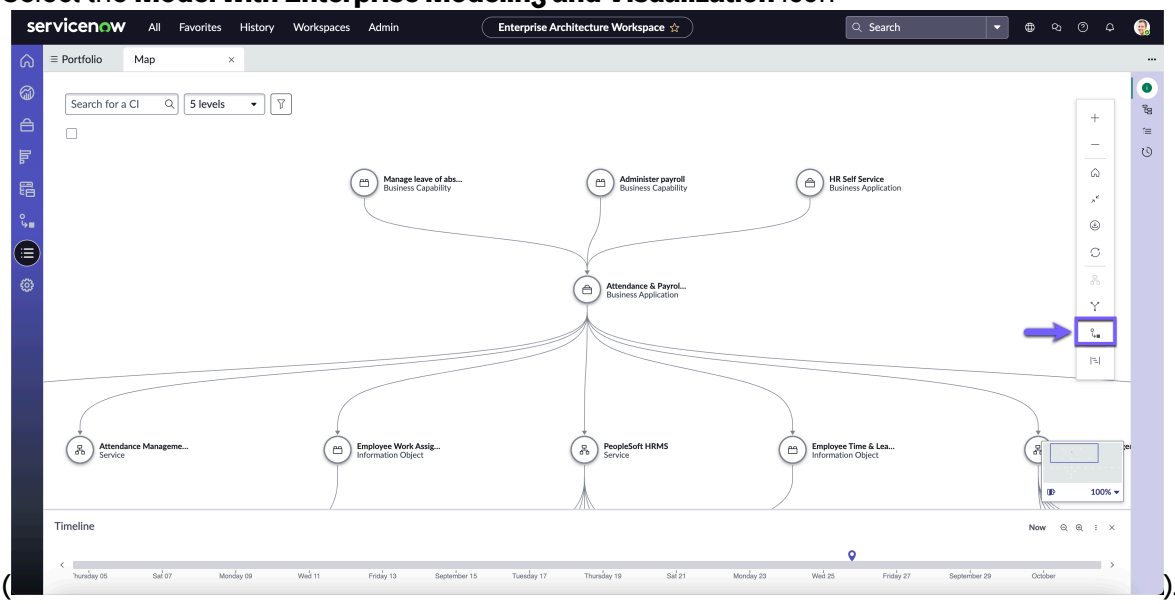
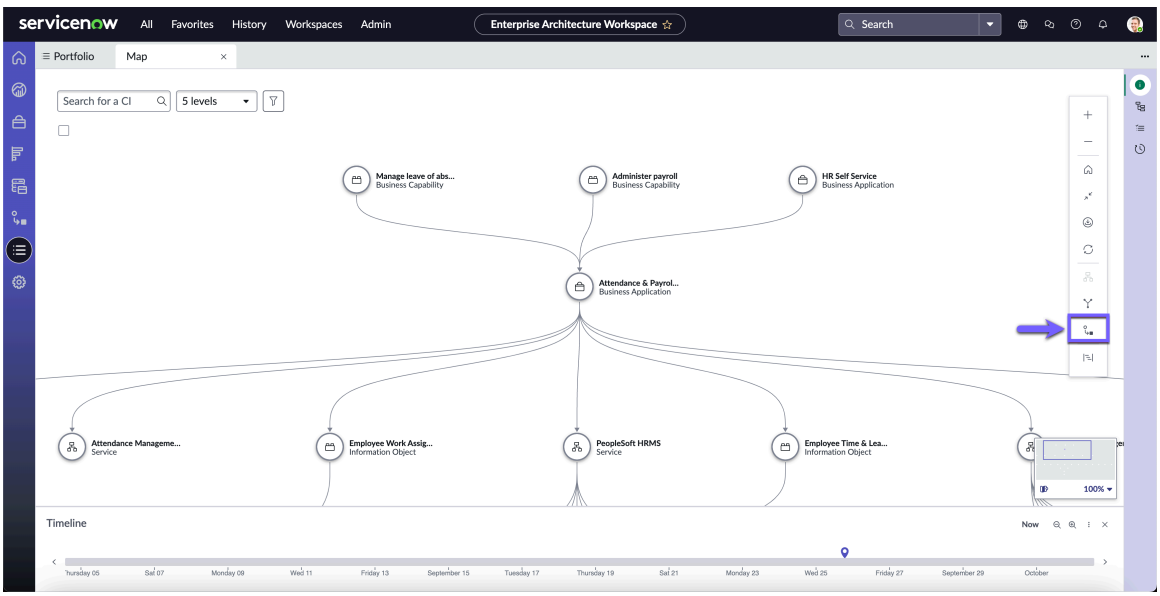
Procedure

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**.
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.

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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

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.

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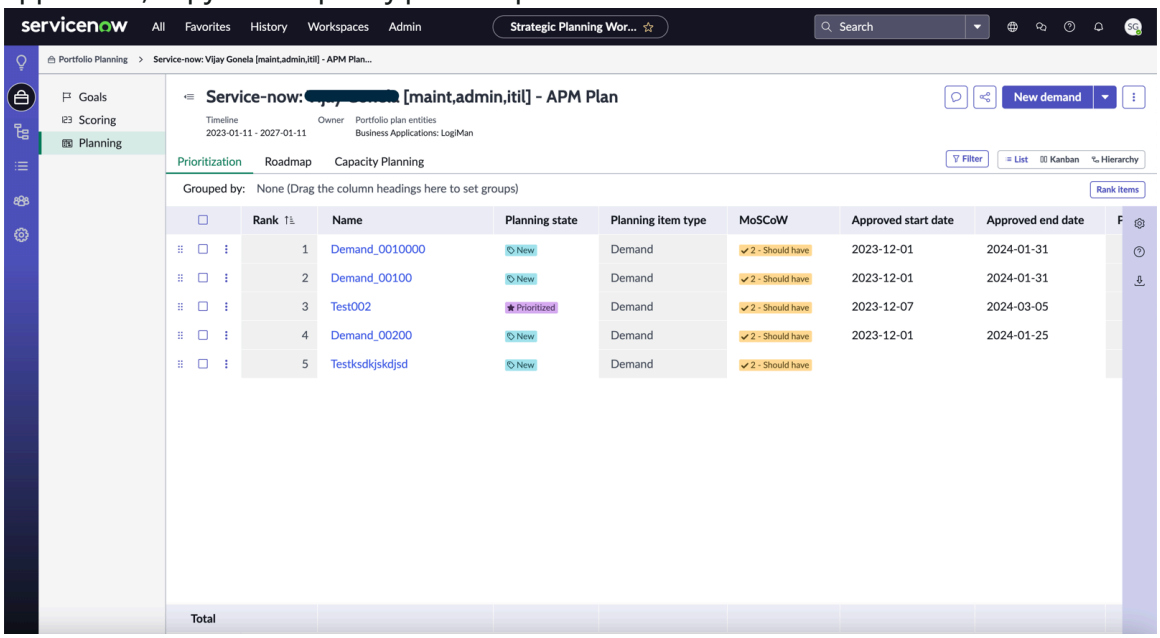
Note: The temporary portfolio plan is meant for preview purpose only. To plan, prioritize, and roadmap the work for your business application, copy the temporary portfolio plan or create one.



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 of a business application in EA Workspace

View architectural artifacts associated with a business application

Create an architectural artifact and associate it with a business application

Add an existing architectural artifact to a business application

Remove architectural artifacts associated with a business application

Open business application form in Core UI from EA Workspace

Create a Lucidchart diagram for a business application in the EA Workspace

Create a diagram for a business application in the EA Workspace

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Remove business capabilities associated with a business application

Add an existing business capability to a business application

View business capabilities associated with a business application

Add or edit a business application

View all business applications

View product capabilities associated with 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

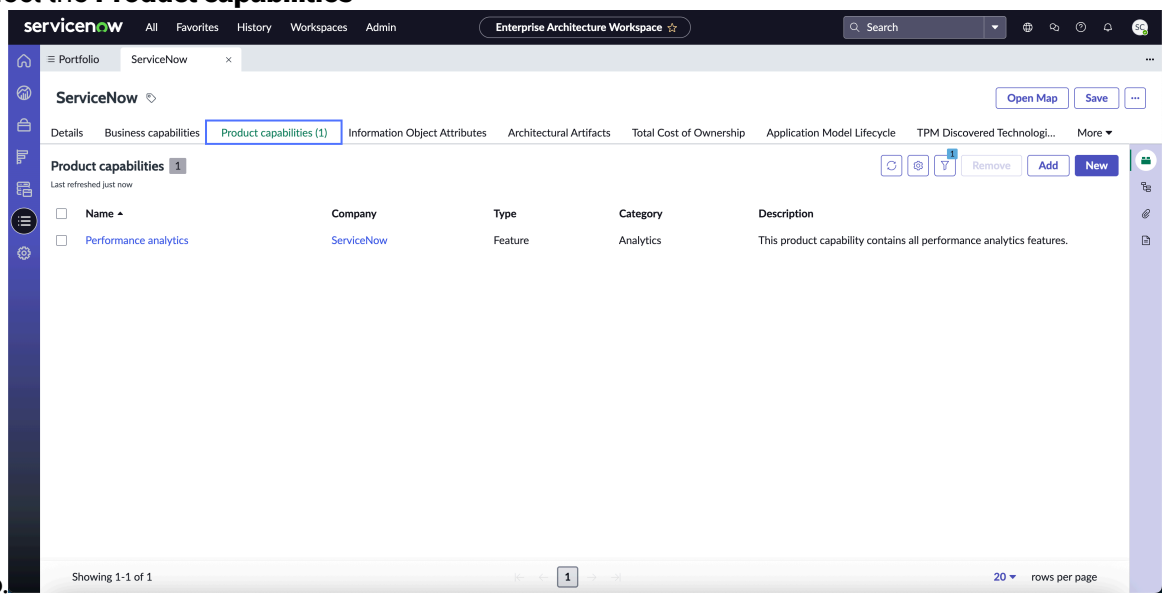
The Product capabilities tab is displayed only when the Model ID detail is also available for the business application.

When the **Model ID** field for a business application is initially empty and later populated, all product capabilities associated with that model ID will automatically appear in the **Product capabilities** related list of the corresponding business application.

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 view the product capabilities for.
6. Select the **Product capabilities** tab.



Result

A list of product capabilities associated with the business application is displayed.

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Related topics

- Exploring product capabilities
- Create a product capability and associate it with a business application
- Add an existing product capability to a business application

Create a product capability and associate it with a business application

You can create product capabilities and associate them with business applications in the Enterprise Architecture Workspace.

Before you begin

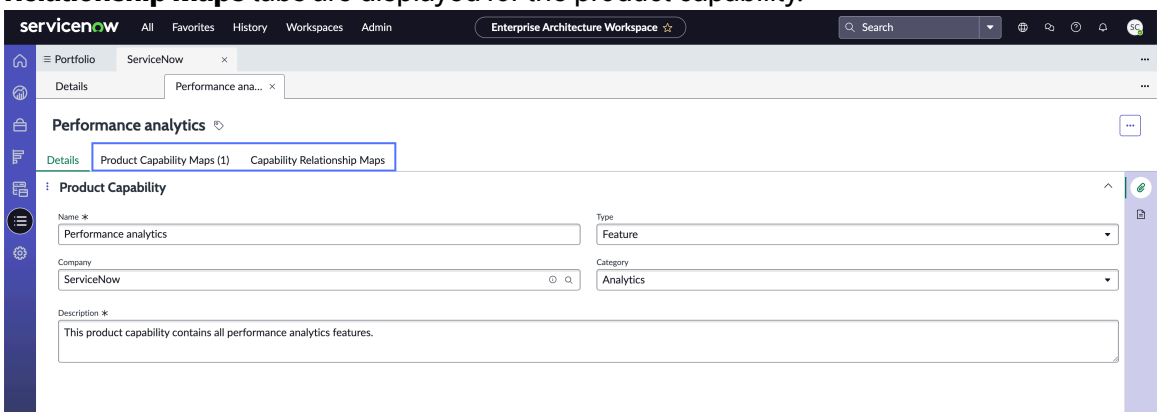
Role required: sn_apm.apm_user

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.
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 associated with a business application
- Add an existing product capability to a business application
- Remove product capabilities associated with a business application

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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**.

Result

The existing product capability is added to the business application.

Related topics

- Exploring product capabilities
- View product capabilities associated with a business application
- Create a product capability and associate it with a business application
- Remove product capabilities associated with a business application

Remove product capabilities associated with a business application

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**.

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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 associated with a business application
- Create a product capability and associate it with a business application
- Add an existing product capability to a business application

Manage information objects of a business application 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

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**.

View architectural artifacts associated with 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.

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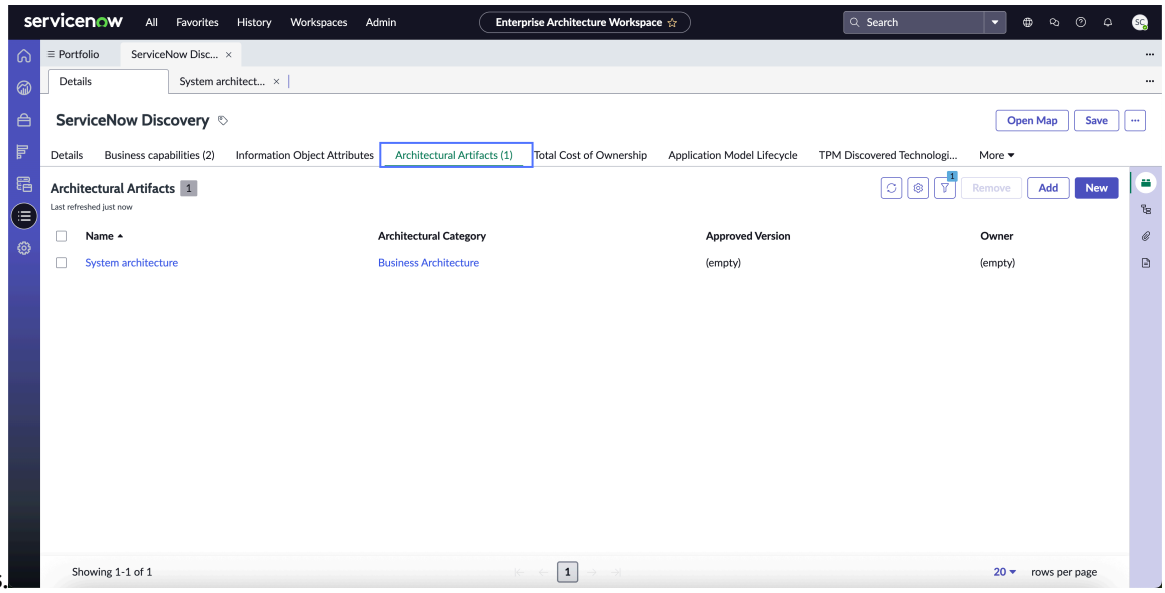
Role required: sn_apm.apm_read

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.
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

- Create an architectural artifact and associate it with a business application
- Add an existing 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 of type URL or Attachment
- Download an architectural artifact version
- Delete an architectural artifact version

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Create an architectural artifact and associate it with a business application

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

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 associated with a business application

Add an existing 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 of type URL or Attachment

Download an architectural artifact version

Delete an architectural artifact version

Add an existing architectural artifact to a business application

You can add existing architectural artifacts to business applications in the EA Workspace.

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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 **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
- Create an architectural artifact and associate it with a business application
- Remove architectural artifacts associated with a business application
- View architectural artifacts associated with 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 of type URL or Attachment
- Download an architectural artifact version
- Delete an architectural artifact version

Remove architectural artifacts associated with 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**.

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4. Select **Business Applications**.
5. Select the business application that you want to remove the architectural artifact for.
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 existing architectural artifact to a business application

Create an architectural artifact and associate it with a business application

View architectural artifacts associated with 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 of type URL or Attachment

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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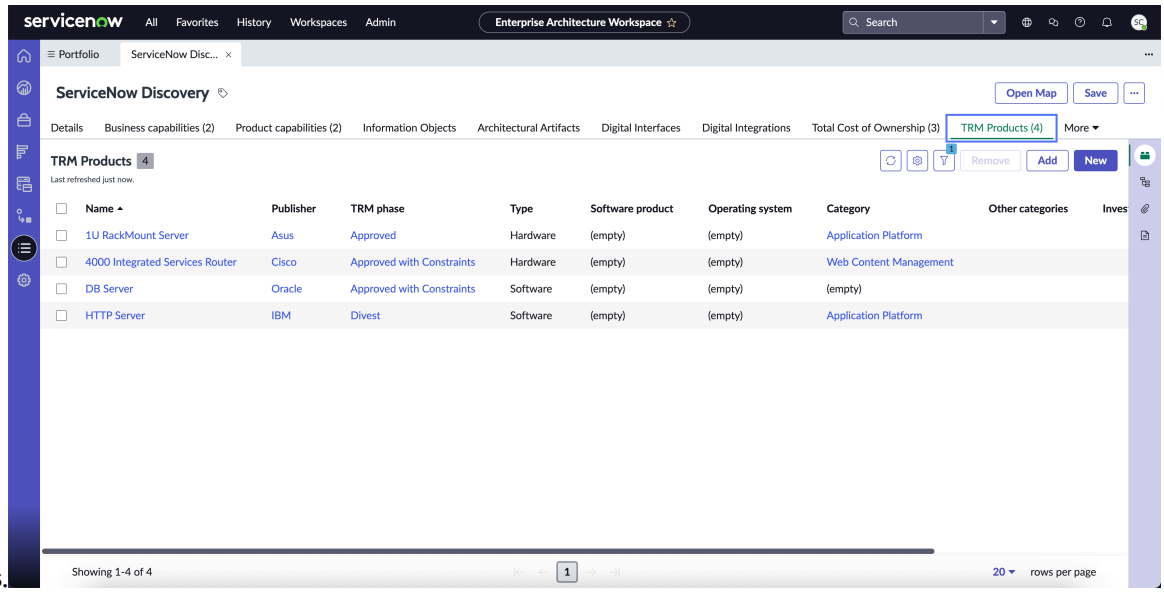
5. Select the business application that you want to view the TRM products for.
6. Select **TRM Products**.



Result

A list of TRM products associated with the business application is displayed.

Related topics

- Exploring the application portfolio
- Manage the Technology Reference Model in Enterprise Architecture Workspace
- Working with Technology Reference Model (TRM) in EA Workspace

View TRM technical debts associated with a business application

View Technology Reference Model (TRM) associated to a business application 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 view the TRM technical debts for.

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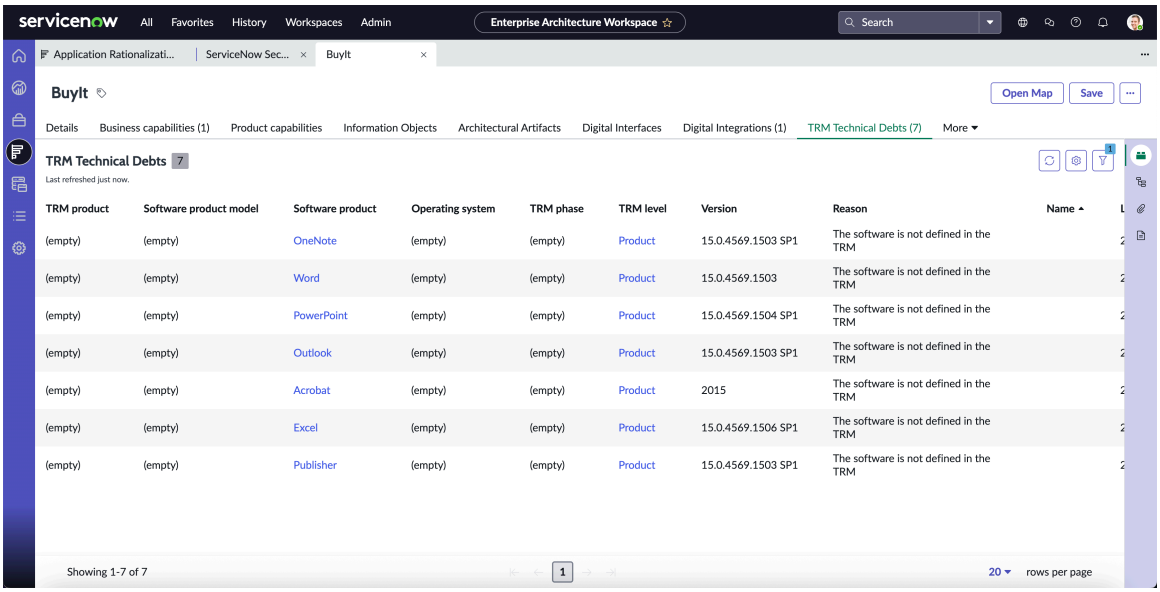
6. Select **TRM Technical Debts**.



Result

A list of TRM technical debts associated with the business application is displayed.

Related topics

Manage TRM technical debt

TRM Technical Debt calculation in Enterprise Architecture Workspace

Create Technology Reference Model products and associate it 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 TRM product form.

9. Select **Save**.

Result

The TRM product is added to the business application.

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Related topics

- Exploring the application portfolio
- Manage the Technology Reference Model in Enterprise Architecture Workspace
- Working with Technology Reference Model (TRM) in EA Workspace

Add existing Technology Reference Model 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

- Manage the 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 Technology Reference Model products associated with 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 ( ).
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 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
- Manage the 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 AI systems to business applications

You can add AI system product models to business applications in the Enterprise Architecture Workspace. Associating AI system product models to business applications enables enterprise architects to monitor AI usage along with your business applications, enabling better lifecycle visibility and tracking, and improving compliance and decision making.

Before you begin
Role required: sn_apm.apm_user

About this task
An AI system product model is an AI-powered system that delivers business outcomes. It is linked to AI models, datasets, and prompts. For information on AI product models, see Exploring the AI Portfolio and Working with an application portfolio.

Adding AI system product models to business applications provides governed and auditable traceability from a business application to a AI capability. This improves impact analysis, risk controls, and portfolio decisions.

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 AI system to.
6. Select **AI Product Models**.

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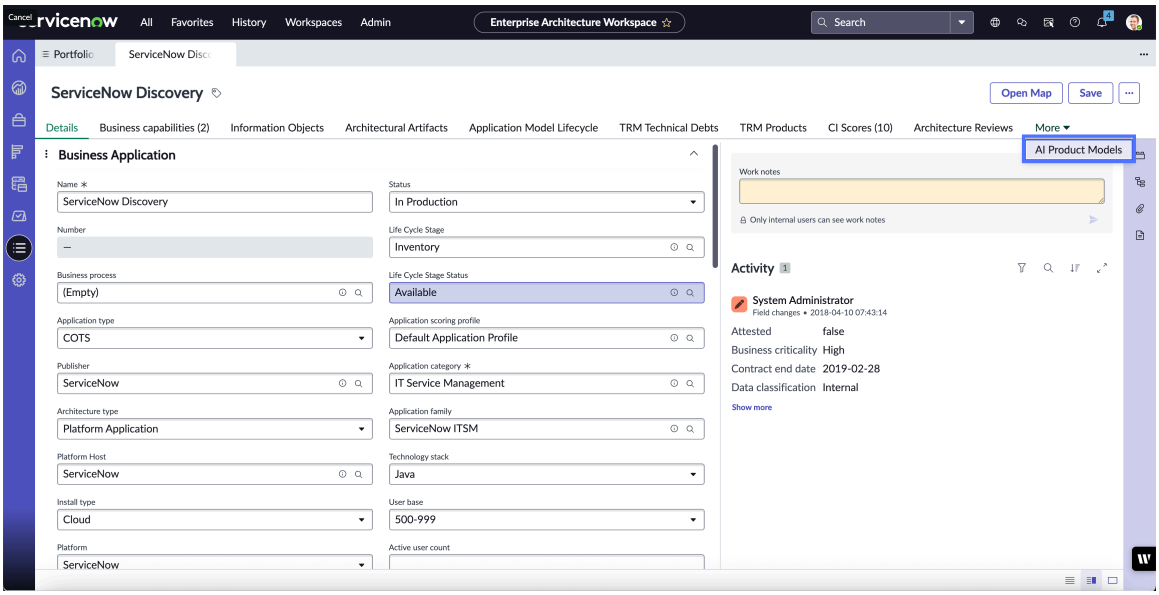
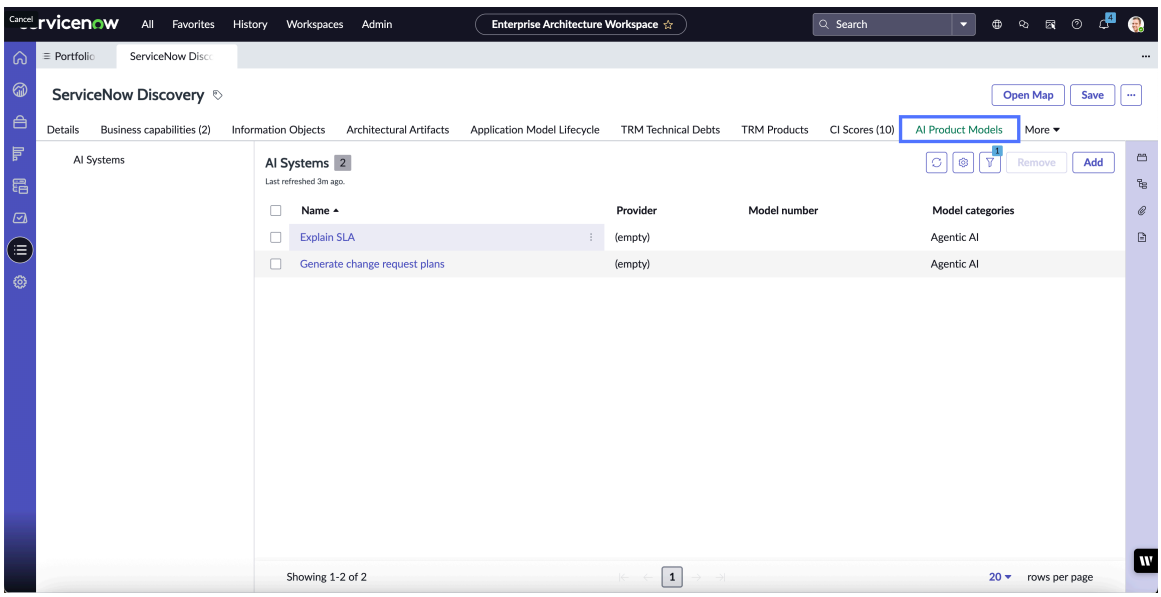
Note: If the **AI Product Models** tab is not visible, select **More** and then select **AI Product Models**.



The AI Product Models tab appears.



7. In the AI Product Models tab, select **Add**.
8. In the **Add AI system** pop-up window, select the existing AI system.
9. Select **Add**.

Result

The AI system is added to the business application.

Related topics

Exploring the AI Portfolio

Working with AI Portfolio

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Remove AI systems associated with business applications

You can remove the AI systems product models associated with business applications in the Enterprise Architecture Workspace, confirming only the relevant and current AI system product models are associated with the business application. You can remove multiple AI system product models simultaneously.

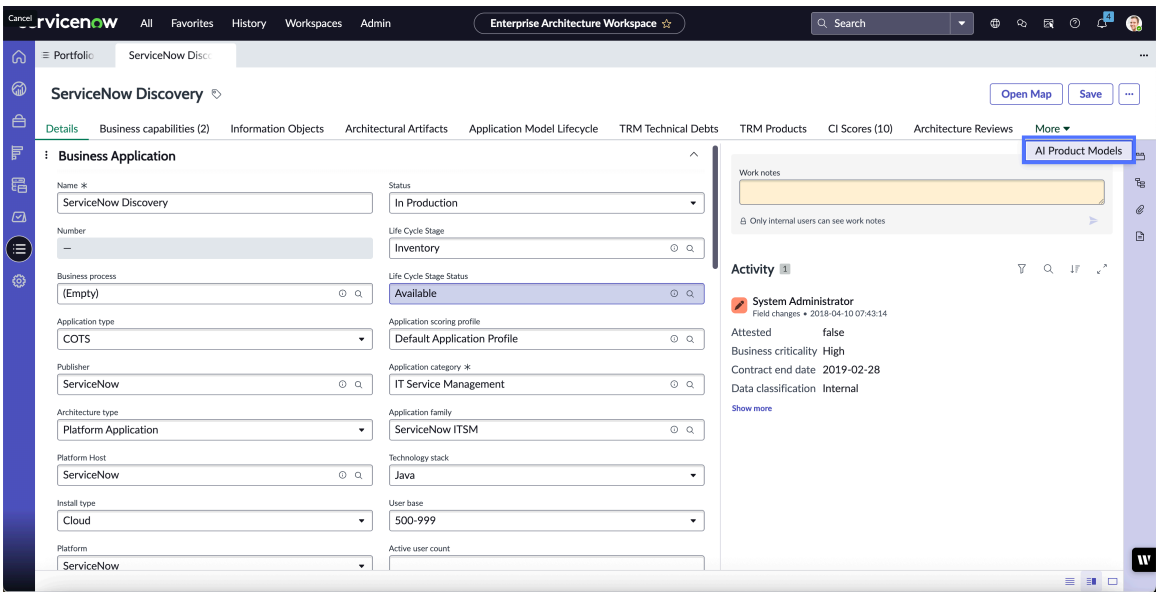
Before you begin

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 AI system product models for.
6. Select **AI Product Models**.

> **Note:** If the **AI Product Models** tab is not visible, select **More** and then select **AI Product Models**.



7. Select the check box next to the AI system product models that you want to remove and select **Remove**.
   A confirmation message appears.
8. Select **Remove**.

Result

The AI system product model is removed from the business application.

Working with product capabilities

Add or edit product capabilities in the Enterprise Architecture Workspace.

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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

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 associated with a business application
- Create a product capability and associate it with a business application
- Add an existing product capability to a business application

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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**.
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

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.

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View all data domains

You can view the list of all data domains in the Enterprise Architecture Workspace.

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.

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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.

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 of a business application 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**.

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Related topics

- View all information objects
- Manage information objects of a business application in EA Workspace
- 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 of type URL or Attachment
- 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

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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 **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 of type URL or Attachment

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.
   - For file type **Architectural decision record**, you are redirected to the newly created architectural decision record page.
   - For file type **URL** or **Attachment**, you are redirected to the architectural version record of the newly created architectural artifact.

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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 of type URL or Attachment
- 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 of type URL or Attachment
- Share an architectural artifact with users or groups
- View all architectural artifact categories
- View all architectural artifacts

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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.

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

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Request approval for an architectural artifact of type URL or Attachment

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.

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**.

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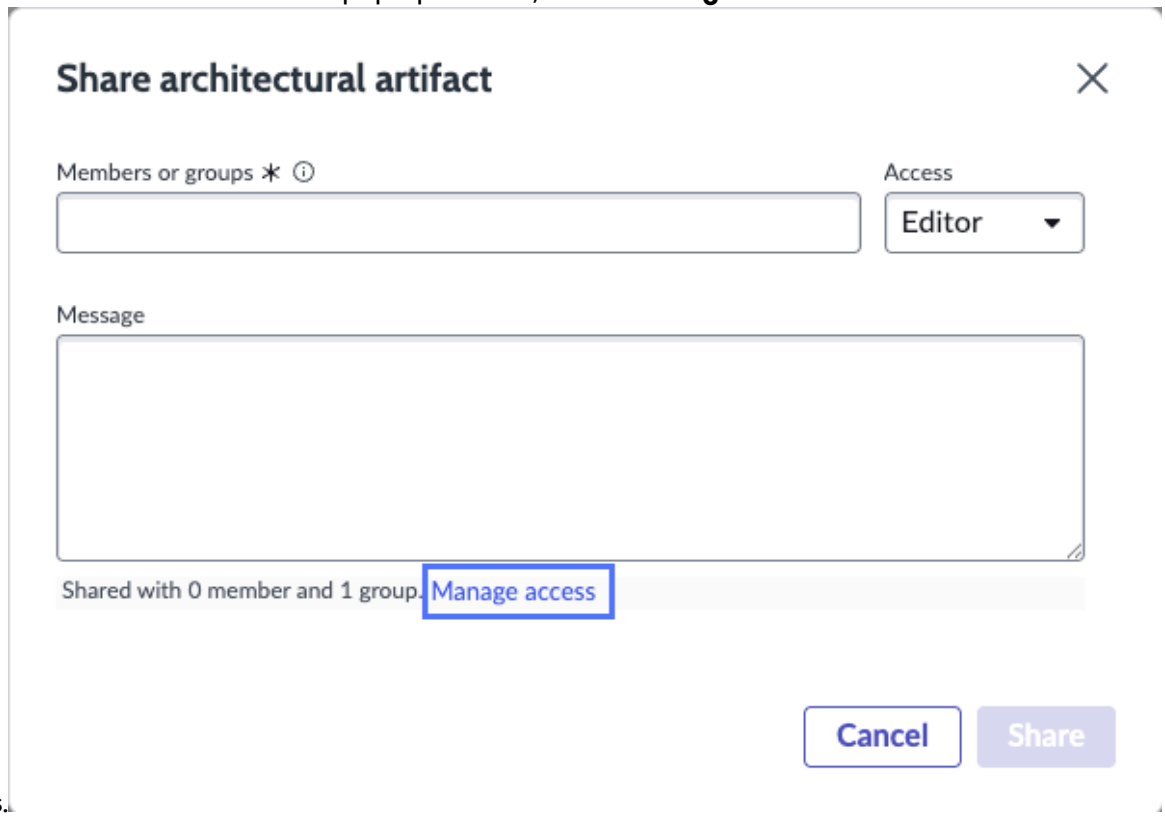
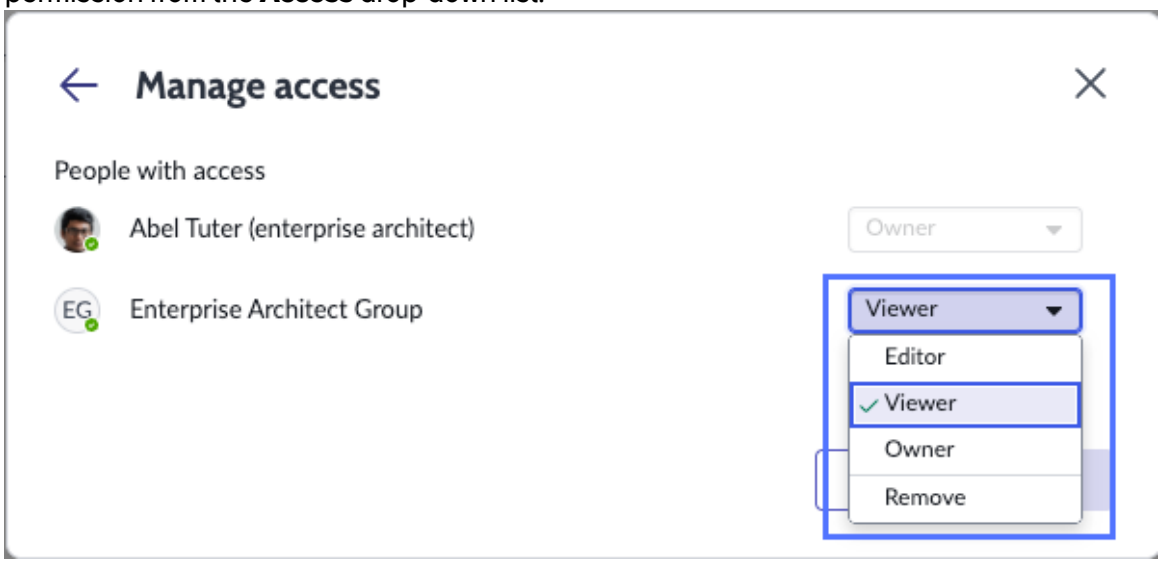
7. In the **Share architectural artifact** pop-up window, select **Manage access**.



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.



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

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Add a related entity to an architectural artifact

Request approval for an architectural artifact of type URL or Attachment

View all architectural artifact categories

View all architectural artifacts

Request approval for an architectural artifact of type URL or Attachment

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.

   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 architectural artifact version of type Architectural Decision Record

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

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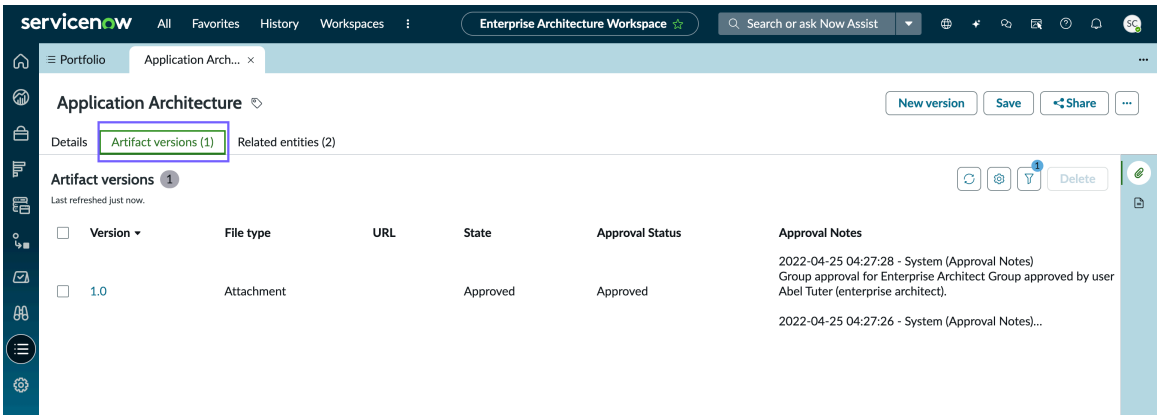
About this task

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**.



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 of type URL or Attachment
- 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

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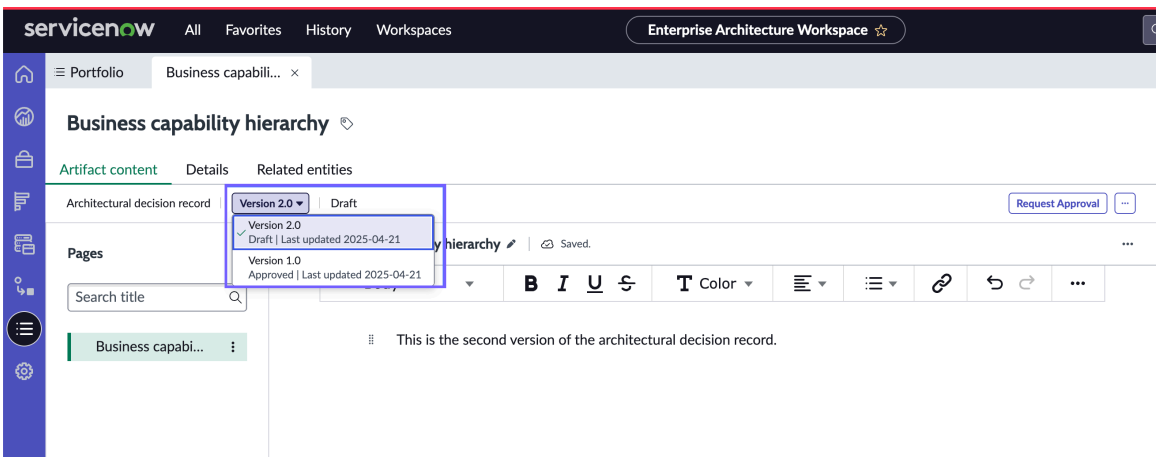
Procedure

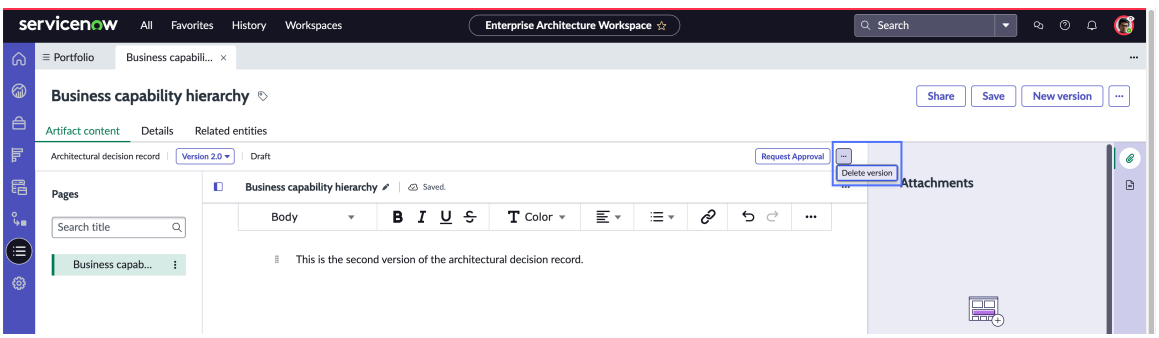
1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Portfolio List view by selecting the Portfolio icon .
3. Select the expand row icon ( ) next to **Information Portfolio**.
4. Select **Architectural Artifacts**.
5. Open the architectural artifact for which you want to delete 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.
     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**.

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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
- Request approval for an architectural artifact of type URL or Attachment
- 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**.

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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 of type URL or Attachment
- Add a related entity to an architectural artifact
- Create and manage pages and subpages for architectural decision records
- Tag users or records in Architectural Decision Records
- Enable referencing additional records in architectural decision records
- Add an architectural decision record version
- Request approval for an architectural artifact version of type Architectural Decision Record

Create and manage pages and subpages for architectural decision records

Flexibly organize information for your architectural decision records (ADR) by creating, duplicating, and deleting pages and subpages in the Enterprise Architecture Workspace.

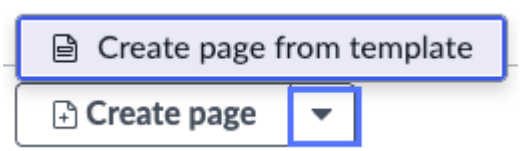
Before you begin
An ADR can have multiple doc pages associated with it to help you organize key architectural artifact details. Predefined ServiceNow Docs component (sn_docs) templates are available. You can create ADR pages using one of these templates or start with a blank page.

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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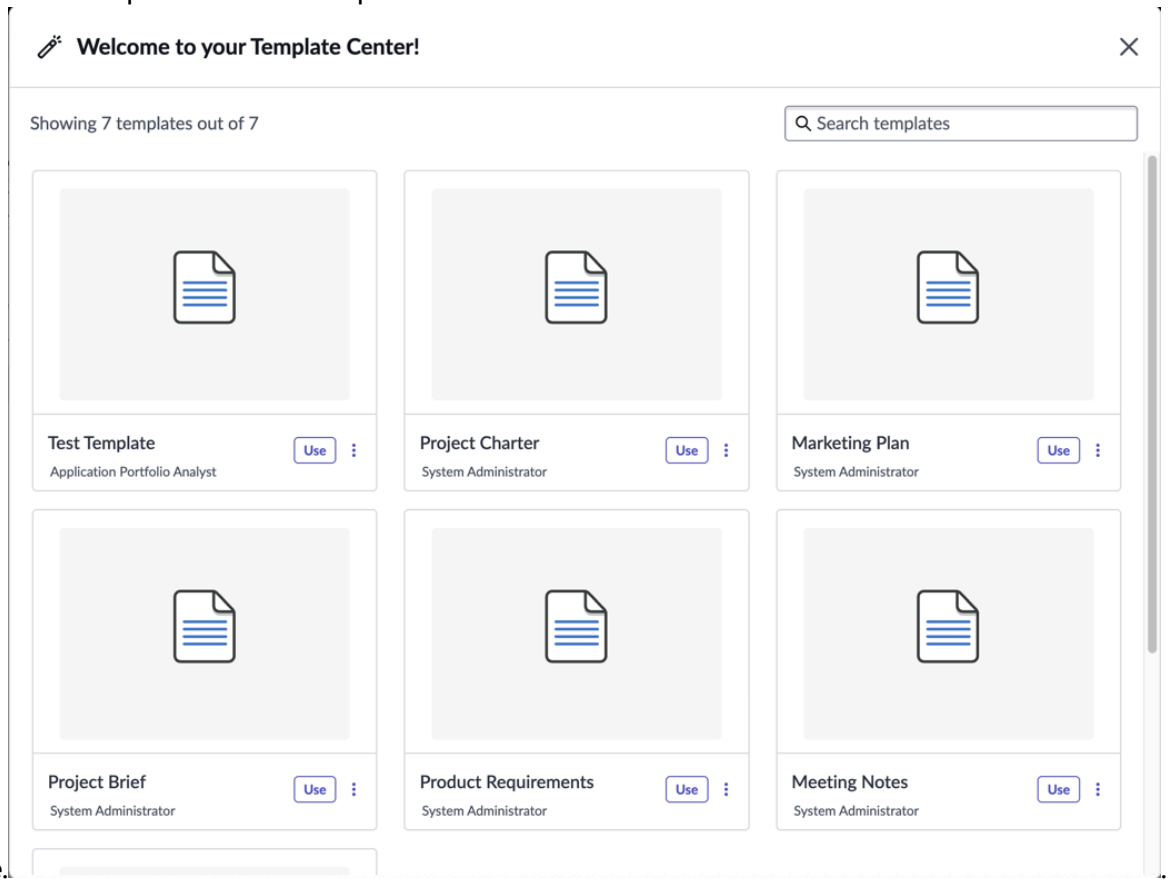
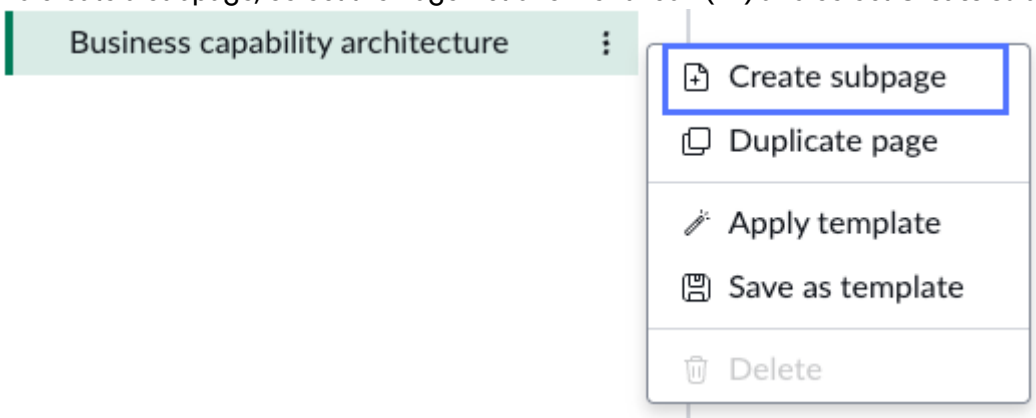
b. Choose a template from the Template Center and select **Use**.



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 the Architectural Decision Records (ADRs)
- Add or edit an architectural decision record (ADR)
- Request approval for an architectural artifact version of type Architectural Decision Record

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Add an architectural decision record version

Enable referencing additional records in architectural 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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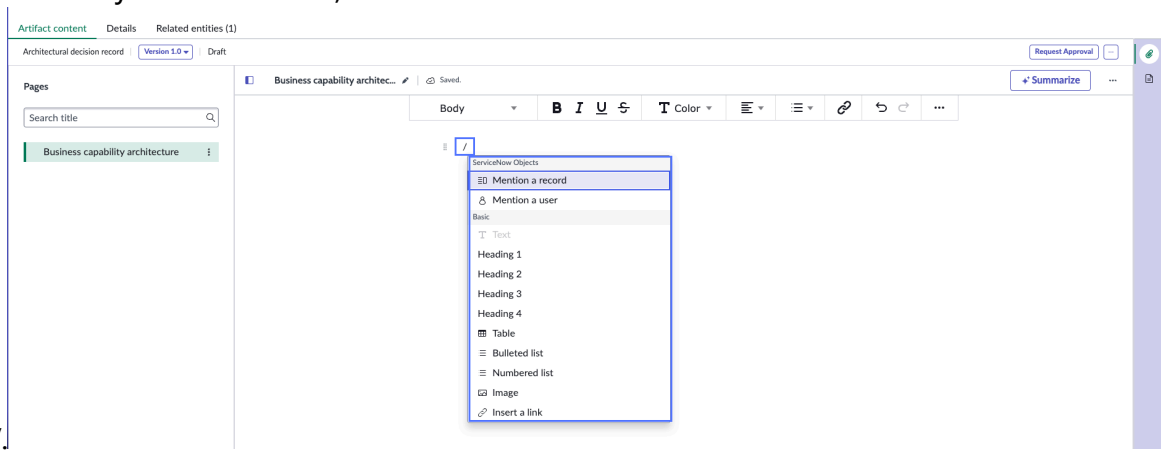
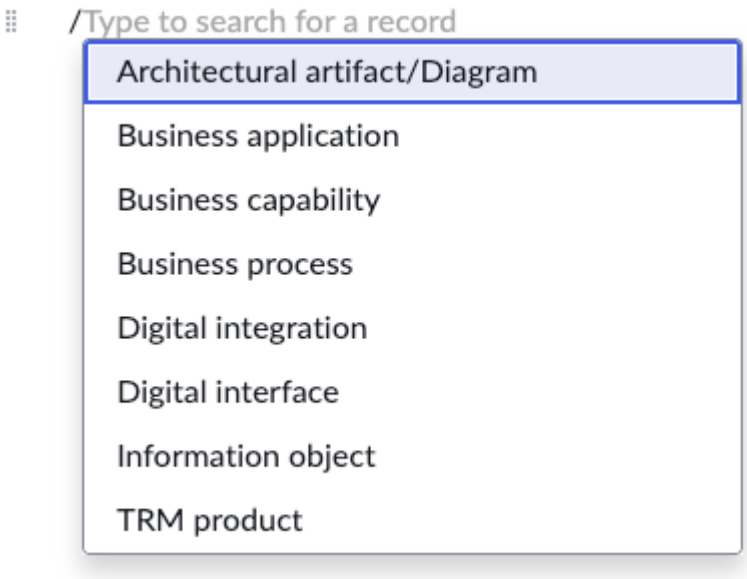
6. In the body of the ADR docs, enter /.



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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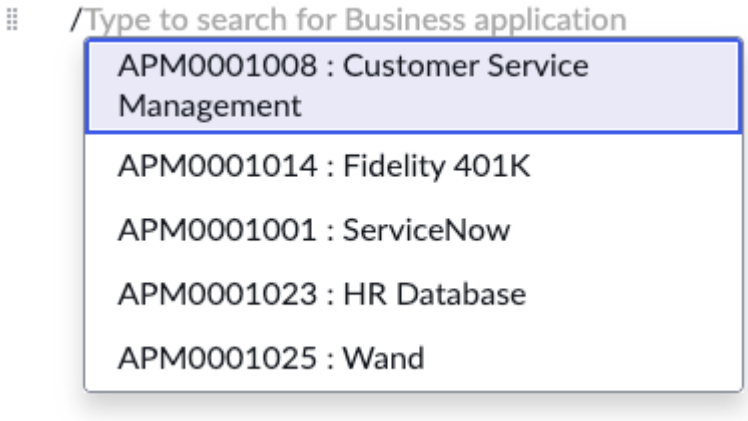


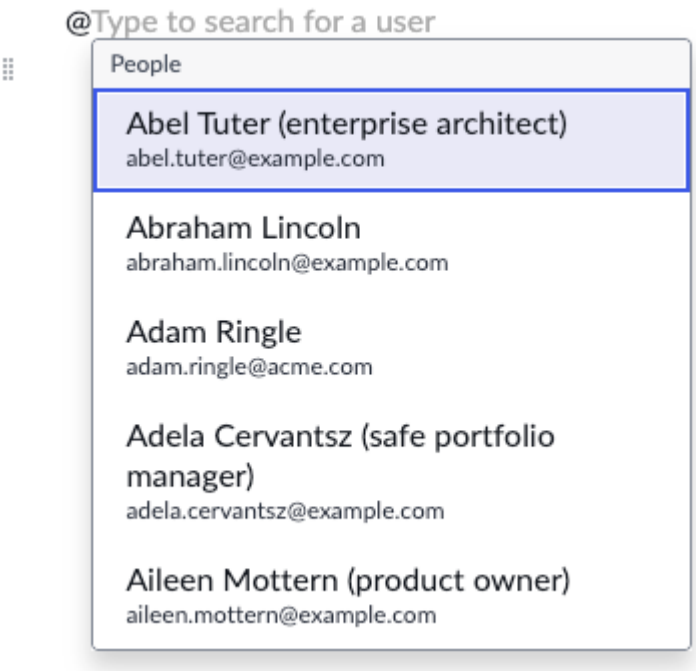
c. Select the relevant record.

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 the Architectural Decision Records (ADRs)
- Add or edit an architectural decision record (ADR)
- Request approval for an architectural artifact version of type Architectural Decision Record
- Create and manage pages and subpages for architectural decision records

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Add an architectural decision record version

Enable referencing additional records in architectural decision records

Enable referencing additional records in architectural 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 architectural artifact version of type Architectural Decision Record

Create and manage pages and subpages for architectural decision records

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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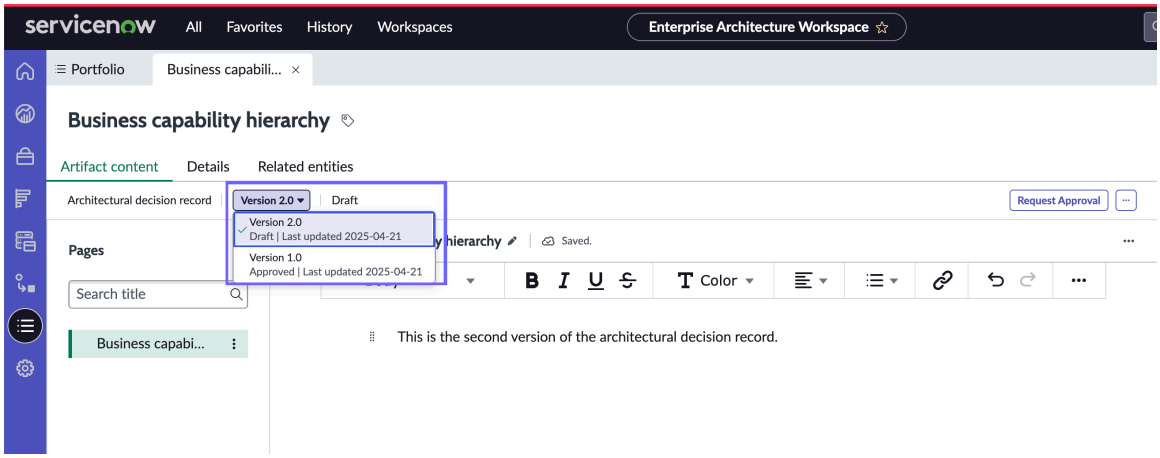

Related topics

- 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 architectural artifact version of type Architectural Decision Record
- Create and manage pages and subpages for architectural decision records
- Enable referencing additional records in architectural decision records

Request approval for an architectural artifact version of type Architectural Decision Record

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 architectural decision records
- Tag users or records in Architectural Decision Records

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Enable referencing additional records in architectural 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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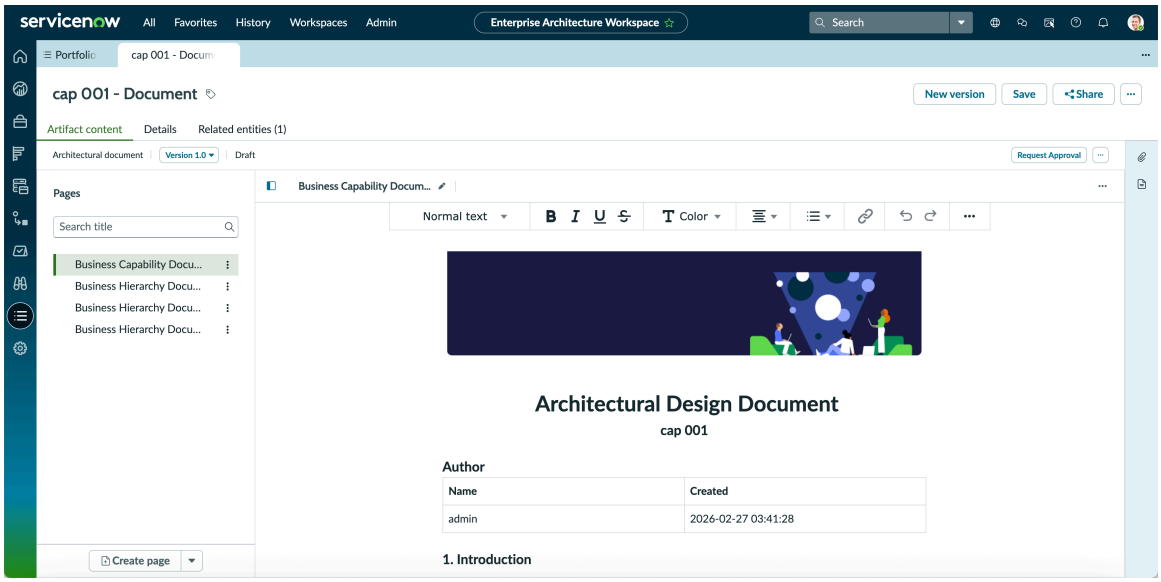
7. Select **Create**.
   An artifact gets created.

   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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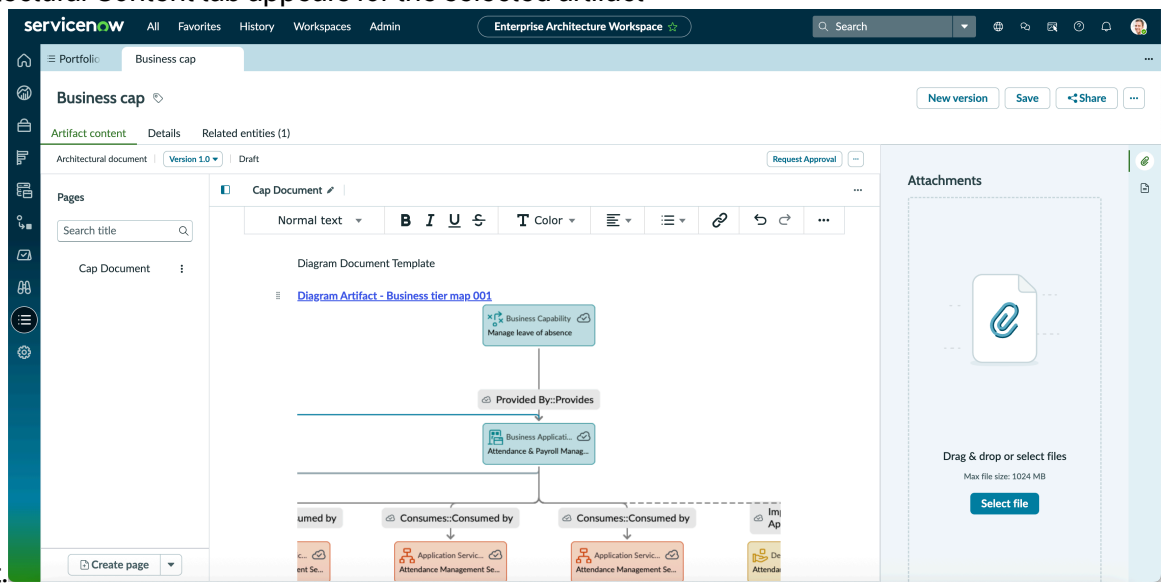
4. Select **Architectural Documents**.
5. Select an existing architectural document.
   The Architectural Content tab appears for the selected artifact document.



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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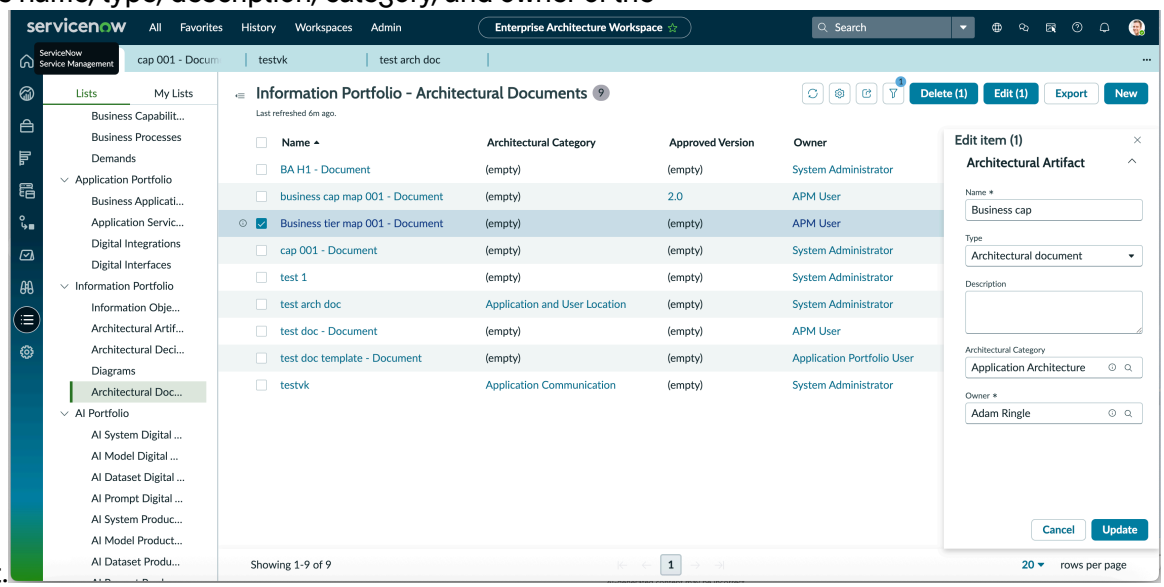
The artifact details opened in the right panel. Modify details such as name, type, description, category, and owner of the artifact.



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 of type URL or Attachment.
- **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 AI Portfolio

Manage AI portfolio assets in the Enterprise Architecture Workspace.

Related topics

Exploring the AI Portfolio

View all AI system digital assets

You can view the list of all available AI system digital assets 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 **AI Portfolio**.
4. Select **AI System Digital Asset**.

Result

A list of AI system digital assets is displayed.

Related topics

Exploring the AI Portfolio

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View all AI model digital assets

You can view the list of all available AI model digital assets 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 **AI Portfolio**.
4. Select **AI Model Digital Asset**.

Result
A list of AI model digital assets is displayed.

Related topics

Exploring the AI Portfolio

View all AI dataset digital assets

You can view the list of all available AI dataset digital assets 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 **AI Portfolio**.
4. Select **AI Dataset Digital Asset**.

Result
A list of AI dataset digital assets is displayed.

Related topics

Exploring the AI Portfolio

View all AI Prompt Digital Assets

You can view the list of all available AI prompt digital assets 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 .

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3. Select the expand row icon ( ) next to **AI Portfolio**.
4. Select **AI Prompt Digital Asset**.

Result
A list of AI prompt digital assets is displayed.

Related topics
Exploring the AI Portfolio

View all AI System Product Models

You can view the list of all available AI system product models 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 **AI Portfolio**.
4. Select **AI System Product Models**.

Result
A list of AI system product models is displayed.

Related topics
Exploring the AI Portfolio

View all AI Model Product Models

You can view the list of all available AI model product models 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 **AI Portfolio**.
4. Select **AI Model Product Models**.

Result
A list of AI model product models is displayed.

Related topics
Exploring the AI Portfolio

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View all AI Dataset Product Models

You can view the list of all available AI dataset product models 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 **AI Portfolio**.
4. Select **AI Dataset Product Models**.

Result
A list of AI dataset product models is displayed.

Related topics

Exploring the AI Portfolio

View all AI Prompt Product Models

You can view the list of all available AI prompt product models 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 **AI Portfolio**.
4. Select **AI Prompt Product Models**.

Result
A list of AI prompt product models is displayed.

Related topics

Exploring the AI Portfolio

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

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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 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 associated with a business application

Add an existing business capability to a business application

Remove business capabilities associated with a business application

Add or edit your business capabilities

Add or edit a business capability to align your organization's business goals.

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 .

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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

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

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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 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.

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 in the EA Workspace
- 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 of a business application in EA Workspace

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View architectural artifacts associated with a business application

Create an architectural artifact and associate it with a business application

Add an existing architectural artifact to a business application

Remove architectural artifacts associated with 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**.

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**.

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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**.

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**.

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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**.

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 of type URL or Attachment
- 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.

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- 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 of type URL or Attachment
- 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
- Request a TRM product lifecycle
- Add a TRM product in Enterprise Architecture Workspace

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Associate an Architectural Artifact to a TRM product

Add a TRM product lifecycle

View TRM technical debts

Run a scheduled job to update TRM technical debt data in EA Workspace

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**.
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

Request a TRM product lifecycle

Add a TRM product in Enterprise Architecture Workspace

Associate an Architectural Artifact to a TRM product

Add a TRM product lifecycle

View TRM technical debts

Run a scheduled job to update TRM technical debt data in EA Workspace

View your digital integrations

View the list of all digital integrations created by you in the Enterprise Architecture Workspace.

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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 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

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.

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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

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 in EA Workspace
- 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

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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**.

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 in EA Workspace

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 to evaluate the cost of business applications and leverage the 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**.

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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 duration of a 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

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 duration of a 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.

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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.

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**.

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**.

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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. In the case where 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

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**.

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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**.
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

Working with digital interfaces

Add or edit a digital interface, connect a digital interface to a CMDB API, manage artifacts, relate an SDLC component, information object, and credentials to a digital interface 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 in EA Workspace
- 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 in 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

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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 helps you find out which digital integration uses which API, which APIs are built out of the design specs of the digital interface, and what environments are deployed. The relationship helps to 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.

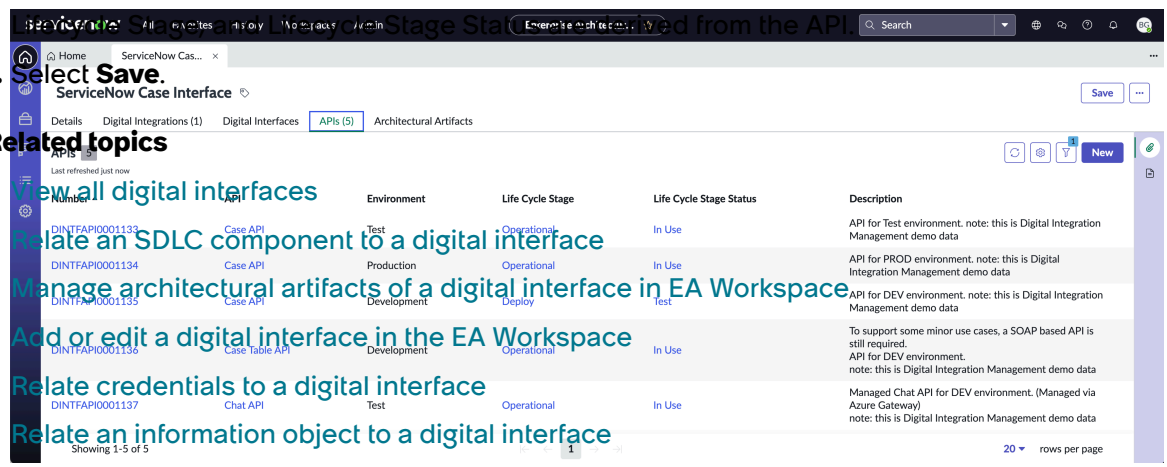
Role required: sn_apm.apm_analyst

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 derived 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 in EA Workspace

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 in EA Workspace

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**.

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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.

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 in EA Workspace
- 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 in EA Workspace
- 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 in EA Workspace
- 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
- Manage the 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

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 the links to modify the article configuration and life cycle configuration. For more details, see Edit a published TRM catalog configuration.

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- **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 structureusing AND/OR operators, modify display fields, and 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

When you publish a TRM catalog, the details such as products, lifecycle phases, and standards are transformed into structured Knowledge Base articles that 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 new configuration to publish.
   For instructions to create a new 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

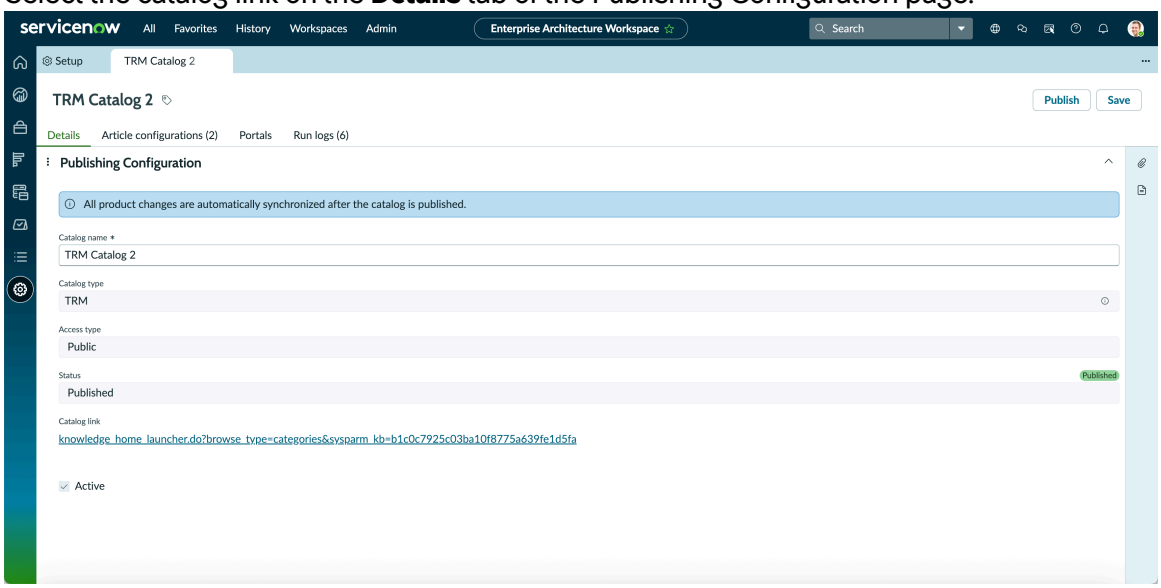
Role required: sn_apm.apm_user

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.

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

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.

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Related topics

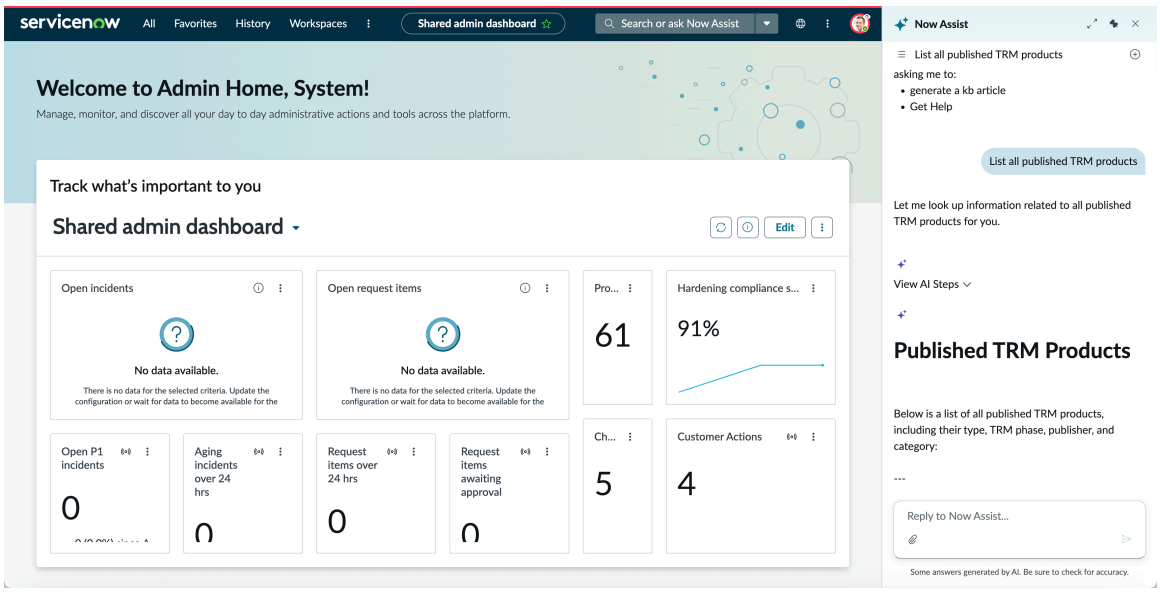
- Publish a TRM catalog to the knowledge base
- Create a configuration to publish TRM data
- Access the published TRM catalog knowledge base

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 Now Assist 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 and get 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?

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:

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- 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**.
- 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 Now Assist panel standard chat.
- Install the Now Assist for EA plugin. For instructions, see Configure Now Assist 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**.
- 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 Now Assist panel standard chat.
- Install the Now Assist for EA plugin. For instructions, see Configure Now Assist for Enterprise Architecture (EA).
- Install the EA Workspace May 2026 update from the ServiceNow Store.

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.

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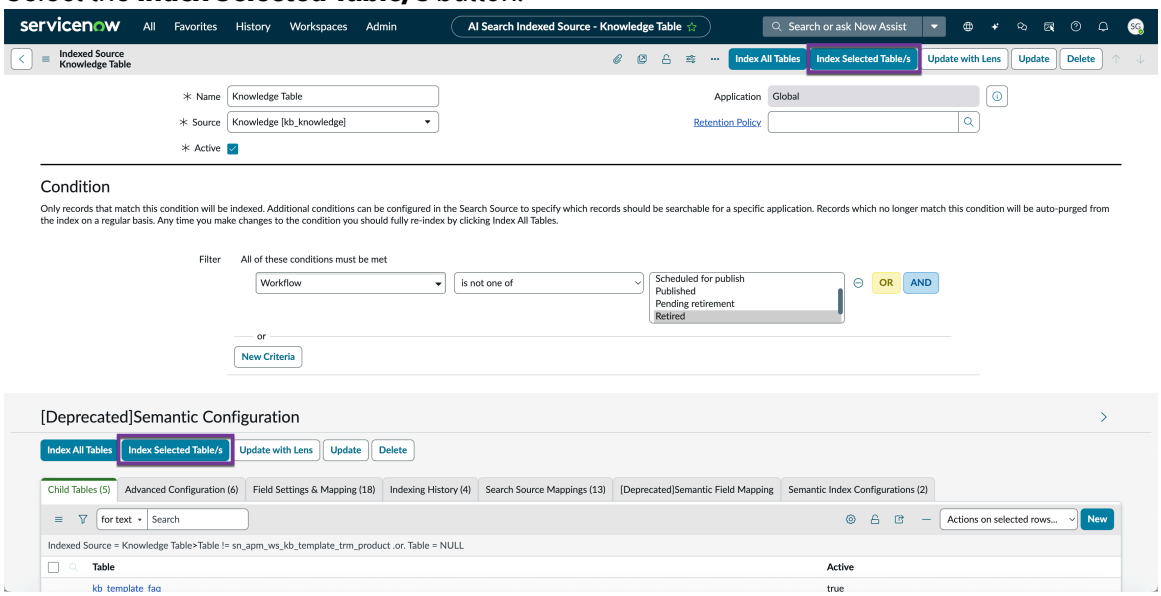
Procedure

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, and the lifecycle of those articles (active, retired, or archived) is managed through Knowledge Management, not through the Publishing Center.

Retiring or archiving Knowledge Base content does not delete or disable the publishing configuration.

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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 the application across various dimensions such as cost, quality, technical risk, business value, to gather real-time insights into the performance of applications and take immediate action, if necessary.

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 and 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

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
- Add or edit a capability indicator
- Activate or turn off an application or capability indicator

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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 with an application 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

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 **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.

Related topics

- View all document templates

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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
- Generate a document from a diagram
- View all architectural documents

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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.

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:

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- 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 in the EA Workspace

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.

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.

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Field	Description
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**.
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

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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

Create TRM product form

As an Enterprise Architect, you can add a new software product to the TRM library. It creates the record directly without sending a request for approval.

TRM Product form fields

Field	Description
Publisher	Publisher of the software product. Look up and select a publisher from the Companies page.
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 choice list:

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Field	Description
	• Approved • Approved with Constraints • Divest • Evaluation • Unapproved
Investment direction	Purpose for the investment. Use the following choice list: • Divest • Eliminated • Invest • Maintain
Business Justification	Business justification for the product request.

Related topics

- Add or edit your TRM products
- Add a TRM product in Enterprise Architecture Workspace

Create TRM product lifecycle form

Add a new lifecycle for a TRM product. It creates the record directly without sending a request for approval.

TRM Product Lifecycle form fields

Field	Description
TRM Product	Name of the TRM product. Look up and select the product from the TRM Products page.
Version	The version of the TRM software product. This field appears only when a TRM product of type software is selected in the **TRM product** field. To create a TRM software product lifecycle with wildcard, end the version with a '*'.
Edition	The edition of the TRM software product. This field appears only when a TRM product of type software is selected in the TRM Product field.
TRM Phase	Phase of the product. Look up and select a phase from the TRM Phases page.
Phase start date	Start date of the product lifecycle phase.
Phase end date	End date for the product lifecycle phase.
Description	Description about the product lifecycle request.

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Related topics

Add a TRM product lifecycle

Request TRM product lifecycle form

Add a new request to create a lifecycle for a TRM product. An email notification is sent to the approver for approval. The approver belongs to the Enterprise Architect group.

Request TRM product lifecycle form fields

Field	Description
Number	A unique, auto-generated identification number for the product lifecycle request.
TRM Product	Name of the TRM product. Look up and select the product from the TRM Product page.
Version	The version of the TRM software product. This field appears only when a TRM product of type software is selected in the **TRM product** field. To create a TRM software product lifecycle with wildcard, end the version with a '*'.
Edition	The edition of the TRM software product. This field appears only when a TRM product of type software is selected in the TRM Product field.
Approval	The approval status of the TRM product lifecycle.
Requested TRM Phase	Phase of the product. Look up and select a phase from the TRM Phases as defined in the Setup page (Enterprise Architecture Workspace > Setup > TRM Phases).
Phase start date	Start date of the product lifecycle phase.
Phase end date	End date for the product lifecycle phase.
Business Application	Name of the business application. Look up and select a business application from the Business Applications page to associate it to the TRM product lifecycle.
Short Description	Description about the product lifecycle request.
Business Justification	Business justification for the product lifecycle request. It helps the approver to better understand the request.

Related topics

Add a TRM product lifecycle

TRM technical debt form

The Technology Reference Model (TRM) technical debts that are created for the products that aren't aligned with the TRM phases and standards.

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Technical Debt form fields

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.
Server	Name of the server related to the TRM product. **Note:** This field is available from Technology Portfolio Management (TPM) plugin version 1.7.1.
Software product model	Name of the software product model related to the TRM product.
Software product	Name of the software product related to the TRM product.
Operating system	The operating system on which the TRM product can be deployed. This field appears on when **Software** is selected in the **Type** field.
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. • 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**
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 timestamp when the custom scheduled job *`Populate TRM technical debts in the EA Workspace`* is run to update the table with technical debt.

Related topics

View TRM technical debts

Manage TRM technical debt

Technology portfolio audit form

You can use the Technology portfolio audit table to view audit information for your applications.

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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

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.

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Field	Description
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.
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. The indicator frequency must match the fiscal period being scored for the **Target maximum** and **Target minimum** values to be applied during normalization. If the frequencies don't match, the system uses dynamic normalization instead.
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.

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Field	Description
	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. When the check box is cleared, values for target maximum and target minimum are considered based on the intelligent logic. The target maximum and target minimum values are applied only when the indicator frequency matches the fiscal period being scored. If the frequencies don't match, the system uses dynamic normalization regardless of whether this check box is selected.

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. • **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. To view results of survey assessments within Enterprise Architecture, see Generate survey assessments and view results within APM. • **Indicators**: Allows you to add dependent child indicators. Through the child indicators, data is gathered to the parent indicator.

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Datasource Configuration section form fields (continued)

Field	Description
	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`. For more information, see Collection of PA indicator score data.
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 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.

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Datasource Configuration section form fields (continued)

Field	Description
	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

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.

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Field	Description
	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.

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 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.

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Field	Description
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 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.
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.
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
- Elaborate or shorten content in form fields

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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.
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.

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Field	Description
	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. • **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

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Field	Description
	• Days • Weeks • Months • Quarters • Years • On Demand • Real Time.
Description	Description about the digital integration. Describe in detail why the integration is being created between two business applications or between an external service provided interface and a business application and what 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.

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.

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Digital Integration form (continued)

Field	Description
	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.
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:

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Digital Integration form (continued)

Field	Description
	• 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 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. Describe in detail why the integration is being created between two business applications or between an external service provided interface and a business application 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:

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Functional section fields (continued)

Field	Description
	• **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: • 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.

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Functional section fields (continued)

Field	Description
	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: • 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

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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.

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.

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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 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

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** • **Retired** • **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.
Retired	Date when the business application is going to be retired.
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

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Planned disposition section form fields (continued)

Field	Description
	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.
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.

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Owners section form fields (continued)

Field	Description
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 decision
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

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.

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.

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Related topics

- Create an architectural artifact and associate it with a business application
- Create or edit an architectural artifact from Portfolio page

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.

Related topics

- Share an architectural artifact with users or groups
- Manage access to architectural artifacts

Application model life-cycle details form

The application model life cycle helps you to better manage the life cycle of a business application.

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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 the bubble chart

Add business application lifecycle data using the 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.

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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.
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

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Field	Description
	• 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.
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:

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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 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.

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

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Planned Disposition section form fields (continued)

Field	Description
	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 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).

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Owners section form fields (continued)

Field	Description
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 decision
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.
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,

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Compliance section form fields (continued)

Field	Description
	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 it with a Technology Reference Model product

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.

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.

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Related topics

- Create a product capability and associate it with a business application
- Exploring product capabilities

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.
Department	Department in a business unit that the demand submitter belongs to.

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Details section form fields (continued)

Field	Description
	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.
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

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

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.

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Field	Description
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. **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.

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Field	Description
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: • 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

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Field	Description
	Architects to decide which interface version they want to use.

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.

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Authentication section form fields (continued)

Field	Description
	Use the following options: • Basic Auth • OpenID Connect • Certificate • 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 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.

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Field	Description
	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

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.

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Ownership section form fields (continued)

Field	Description
Owned by	User responsible for the business process. This user is a member of the **Managed by Group**.

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

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Business Impact section form fields (continued)

Field	Description
	businesses and employees, including fines and damage to your brand, reputation, and people. The available options are: • **1- High** • **2- Medium** • **3- Low**

Related topics

Exploring business processes

Add or edit a business process

View all business processes

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	A unique, descriptive name that identifies the application service and distinguishes it from other services supporting the same business application.
Location	Specifies where the application service is hosted or primarily operated, such as a data center or geographic location.
Short Description	Briefly describes what this application service delivers or supports, such as the capability or function it enables.
Created	Date and time when the application service record was created. These fields are system#generated and read#only.
Created by	This is field is non-editable field.
Updated	Date and time when the application service record was last updated. These fields are system#generated and read#only.
Updated by	Name of the user who updated the application service.
Support group	The group responsible for supporting this application service during normal operations.
Supported by	Name of the user who supports the application service.
Managed by	Name of the user who manages the application service.

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Key Attributes section form fields (continued)

Field	Description
Managed by group	Name of the user group who manages the application service.
Environment	Indicates the deployment environment of the service, such as Development, Test, or Production.
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-populated as Business Service.
Sub-category	This field is auto-populated as Service.
Department	Name of the department.

Discovery Attributes section form fields

Field	Description
Discovery source	Identifies the source that populated or last updated this application service record, such as ServiceNow Discovery or Service Mapping.
First discovered	Date when the application service was first identified by discovery processes. These values are typically system#managed.
Most recent discovery	Date when the application service was most recently identified by discovery processes. These values are typically system#managed.
Correlation ID	Enter the co-relation ID.
Skip sync	Option to select to skip the sync. This is a read-only field.

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.

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Operational Attributes section form fields (continued)

Field	Description
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, MAC Address, and DNS Domain	Network attributes associated with the application service. These fields are usually populated automatically from the CMDB and are not manually maintained in Enterprise Architecture.
Serial number	Enter the serial number.
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

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.
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.

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Field	Description
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.

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 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

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Related topics

Exploring departments

Add or edit a department

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.
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:

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Create user form fields (continued)

Field	Description
	• **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.

Related topics

Exploring departments

Add a user to a department

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:

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Create goal form fields (continued)

Field	Description
	• **(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**.
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.

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Create goal form fields (continued)

Field	Description
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.

Related topics

- Exploring goals
- Add or edit a goal
- Create a sub-goal

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`

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Create target form fields (continued)

Field	Description
	If the **Type** field is set to **Minimize**, then the progress value is calculated using the following formula. `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 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.
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.

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Create demand form fields (continued)

Field	Description
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** • **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.

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Create demand form fields (continued)

Field	Description
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. • 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**

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Create demand form fields (continued)

Field	Description
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. 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 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 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

Create application model form

Add an application model to a value stream for better management of your application portfolios.

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.

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Create application model form (continued)

Field	Description
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
- Add an application model to 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.
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.
Value stream	The name of the value stream with which the value stream stage is associated.

Related topics

- Exploring value stream stages
- Add or edit a value stream stage

Create application category form

Create an application category to categorize applications and rationalize decisions on their usage.

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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.

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

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Create application family form fields (continued)

Field	Description
	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 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.

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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.
	• **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;`

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Data source configuration section fields (continued)

Field	Description

	``
	applications.push(appInfo);
	}
	results.applications =
	applications;
	results;
	``
	• **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. To view results of survey assessments within APM, see Generate survey assessments and view results within APM.
	• **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`. For more information, see Collection of PA indicator score data.

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Data source configuration section fields (continued)

Field	Description
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.

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 scoring profile form

Create an application score profile and update the default application profile with new profile indicators per your requirements.

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

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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.
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.

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Field	Description
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.
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.

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Certification Instances section fields (continued)

Field	Description
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 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

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.

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.

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Modeling configuration form

The modeling configuration form helps you to configure UI options for Enterprise Modeling and Visualization.

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.

Entity configuration form

The entity configuration form helps you to configure entities that can be used in the Enterprise Modeling and Visualization.

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.

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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.

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.

Digital interface SDLC component form

The SDLC components represent the artifacts or configurations that are used to implement an Interface.

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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 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 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 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.

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Field	Description
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 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:

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	• 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.
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

Edit version detail form

Add version labels, descriptions, and rollout dates to an Enterprise Modeling and Visualization diagram to improve traceability and ensure 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.

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Edit version detail form fields (continued)

Field	Description
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

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.
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**.

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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 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 have access to the artifacts associated with those business entities.
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

Associate an Architectural Artifact to a TRM product

Create related entities form

Enterprise Architecture Workspace enables the Enterprise Architects to associate an architectural artifact to existing elements in the ServiceNow AI Platform, such as business capabilities, business applications, digital integrations, digital interfaces, and TRM products. These associations creates a relationship between the artifact and related entities.

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.

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Related topics

Add a related entity to an architectural artifact

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: • 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

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.

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.

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Field	Description
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

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

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.

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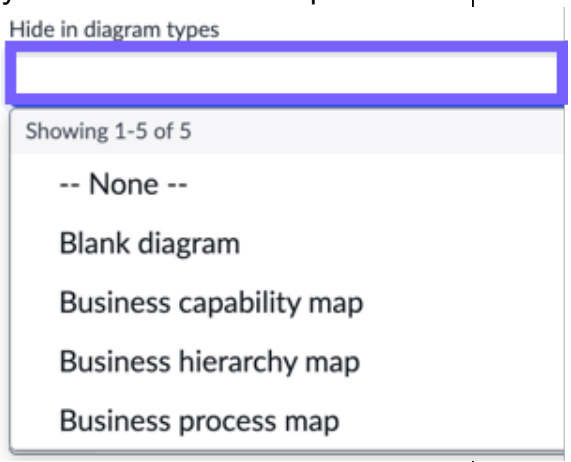
Field	Description
Diagram Action	Select the diagram action that you have created to associate it with this shape element.
Now Icon	Enter name of the icon or image with its extension details.
Application	Name of the application that the shape library is associated with. This is field is auto-populated 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

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Create a diagram action for a custom shape

Add a custom shape library

Create a business process map form

Create a business process map and associate an artifact for the map using Enterprise Modeling and Visualization.

Create a business process map form fields

Field	Description
Link to business process	Define 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	Select an existing business process. 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 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 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.

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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: • **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

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Field	Description
	• 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. **Note:** This field appears only when you select Lucidchart in the Diagramming tool field.

Related topics

Create a Lucidchart diagram for a business application in the EA Workspace

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

General information form

Learn about the fields of the General information form. Use this form to provide details for the new policy.

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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

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: • 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.

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Field	Description
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.

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.

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 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.

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.

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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

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.

Document template form

Use the document template form to create document template that can be used in the Enterprise Architecture Workspace.

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Create document template form

Field	Description
Name	Unique name for your template.
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.

Now Assist for Enterprise Architecture (EA)

Use the ServiceNow® Now Assist for Enterprise Architecture (EA) application to summarize Architectural Decision Records (ADR) and help gather insights into business applications in the Enterprise Architecture Workspace.

Get started

Explore	Configure	Use AI agents
Learn more about Now Assist for Enterprise Architecture (EA)	Configure the Now Assist for Enterprise Architecture (EA) application to get started	Use the AI agent use cases in Now Assist for Enterprise Architecture (EA)

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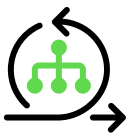
Use	Reference	
 Use the generative AI capabilities offered by Enterprise Architecture (EA)	Learn about forms and fields of Now Assist for Enterprise Architecture (EA)	

Important:

- Not all model providers are available for customers with in-country SKUs, and some Now Assist 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 Now Assist 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 Now Assist 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.

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For more information, see the Now Assist documentation.

Exploring Now Assist for Enterprise Architecture (EA)

With the Now Assist for Enterprise Architecture (EA) application, you can generate a summary of Architectural Decision Records (ADR) or gather insights into business applications in the Enterprise Architecture Workspace.

Now Assist for Enterprise Architecture Overview

The Now Assist for EA application includes the skills and features of generative AI that enable you to summarize text in Architectural Decision Records (ADR) or help gather insights into business applications.

Skills

The Now Assist for Enterprise Architecture (EA) application includes the generative AI skills and features that enable Enterprise Architecture Workspace users to leverage Now Assist skills for artifacts.

Architectural Decision Record (ADR) summarization

Provides you with a concise and informative summary of the selected or complete text by using#Now Assist#n Docs. Use the ADR doc summarization and actions skill in the Enterprise Architecture Workspace to summarize text in ADR artifacts. You can also further shorten or elaborate the summary using the context menu option available on selection of the text in the ADR doc. You can insert summary, shorten text, or elaborated text in the ADR document to update it.

Business application insights

Learn the details of business applications and gather concise and actionable insights on business applications from the summary that is generated by Now Assist for Enterprise Architecture (EA). Help minimize the time that you spend to learn about critical details of business applications like purpose, risk, cost, and recommendations for rationalization.

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. You can compare business application hierarchy, business capability map, and business process map diagrams.

Elaborate or shorten content in form fields

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

You can use Now LLM Service, Now LLM Long Term Stable models (LTS), Azure OpenAI, Google Gemini or Anthropic Claude on AWS as the AI model provider for all Now Assist 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 Now Assist Admin console. For more information, see Large language models on the ServiceNow AI Platform®.

Supporting information for Now Assist for Enterprise Architecture (EA)

Get a quick overview of the important information that is related to the Now Assist for Enterprise Architecture (EA) application.

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Supported versions

The Now Assist for EA application is supported starting with the Yokohama release.

Supported user interfaces

The Now Assist for EA application is supported for the Enterprise Architecture Workspace.

Application information

Activate the latest Now Assist for Enterprise Architecture (EA) (sn_ea_gen_ai) store app to use the Now Assist skills.

This store app has the dependency on Now Assist for Platform (sn_genai_platform) (v6.0.0).

For more information, see Configure Now Assist for Enterprise Architecture (EA).

Related topics

- Exploring Now Assist for Enterprise Architecture (EA)
- Configure Now Assist for Enterprise Architecture (EA)
- Using Now Assist for Enterprise Architecture (EA)
- Now Assist for Enterprise Architecture reference

Configure Now Assist for Enterprise Architecture (EA)

If you have the admin role, you can configure the Now Assist for Enterprise Architecture (EA) to enable generative AI skills in Enterprise Architecture Workspace (EA).

Before you begin

Role required: admin

About this task

Use the Now Assist Admin console to configure Now Assist for EA. While all Now Assist 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 Now Assist Admin.

You can use Now LLM Service, Now LLM Long Term Stable models (LTS), Azure OpenAI, Google Gemini or Anthropic Claude on AWS as the AI model provider for all Now Assist 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 Now Assist Admin 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 Now Assist Admin console.

Enterprise Architecture features and skills in the Now Assist Admin console

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)

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Enterprise Architecture features and skills in the Now Assist Admin console (continued)

EA feature	Skill
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)

Note: Now LLM Service is the default provider for this Now Assist application's skills.

The Now Assist for Enterprise Architecture (EA) system requirements are as follows:

- Now Assist for Platform (v7.0.1)
- Enterprise Architecture Workspace (v3.4.0)

Procedure

1. Install the Now Assist for Enterprise Architecture (EA) plugin (sn_ea_gen_ai).
   - For information about the application dependencies, see Supporting information for Now Assist for Enterprise Architecture (EA).
   - For information about the installation process, see Install Now Assist plugins.
2. Navigate to **All** > **Now Assist Admin** > **Skills** to access the **Now Assist Skills** tab of the Now Assist Admin console.
   If you're already in the Now Assist Admin console, you can select the **Now Assist Skills** tab on the screen.
3. Select the expand row icon next to **Technology**.
4. Select **EA**.
5. Activate and configure the skill for Now Assist for Enterprise Architecture (EA).

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.** In the **Choose input** tab, view the table, fields, and related list details that Now Assist leverages to generate business application insights. **c.** In the **Define availability** tab, configure when and under what conditions the skill will be available and select **Save and continue**. The available options are:

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Skill	Action
	▪ **Skill is always available**: Select this option if you want the skill to be available at all times. ▪ **Customize skill availability**: Select this option if you want to define specific conditions for the availability of the skill. For example, you can define whether you want this skill to be available for active business applications. **d.** In 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 Now Assist for Enterprise Architecture (EA). For information on how to change the application scope, see Select an ap **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 enables you to add specific roles in the **Roles** field. **e.** Select **Apply**. The new role is added to the access list. **Note:** The **Role restrictions to skill** section displays the roles that have access to the skill, by default. **f.** Select **Activate**. The Business application insights skill is activated. **Note:** An admin user can also define and configure custom parameters for the prompt. To define and configure custom parameters, select the context menu icon ( ) next on the **Business applications insights** card and then select **Make a copy**.

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Skill	Action
Diagram change analysis	**a.** Select **Activate Skill**. **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: **i.** Select the edit icon . **ii.** Verify that your application scope is set to Now Assist for Enterprise Architecture (EA). For information on how to change the application scope, see Select an ap **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 **Activate**. The diagram change analysis skill is activat ed.
Refine text	**a.** Select **Activate Skill**. **b.** Select **Define access** and 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 Now Assist for Enterprise Architecture (EA). For information on how to change the application scope, see Select an application from the 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 Now Assist AI agents with access control lists (ACLs), see Implement access control in Now Assist 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.

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

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.

   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.

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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

Now Assist for Enterprise Architecture (EA) access roles

The following roles help you to configure and use each Now Assist for Enterprise Architecture (EA) skill.

Access to Now Assist 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.

Now Assist for Enterprise Architecture (EA) skills and required roles

Skill	Configure role	Use role
Configure Now Assist 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)

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Configuration

All Now Assist for EA skills are configured from the Now Assist Admin console. Configuration requires the admin role or, for AI Data Explorer skills, the now_assist_explorer_admin role.

Capability	now_assist_admin	now_assist_explorer_admin	Notes
Activate and configure all Now Assist for EA skills from the Now Assist 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	✓		
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 summarization, Refine text in exploration, Data visualization generation)		✓	
Configure AI Search for dashboard insight generation		✓	

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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.[illegible]assist_exp	[illegible]apm.[illegible]apm.[illegible]assist_explor	Notes
Generate a Now Assist 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 Now Assist Admin console.

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.[illegible]assist_exp	[illegible]apm.[illegible]apm.[illegible]assist_explor	Notes
Generate insights from the business application details page		✓	

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Capability	nor						Notes
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			✓				

Compare Enterprise Modeling and Visualization diagrams

The diagram change analysis skill generates an AI summary of changes between two diagram versions, including an executive summary and a breakdown of added, modified, and removed shapes and relationships.

Capability	nor						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.

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Capability	nowassist_explor	sn_apm.apm_user	sn_apm.apm_read	nowassist_explor	Notes
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.
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	nowassist_explor	sn_apm.apm_user	sn_apm.apm_read	nowassist_explor	Notes
Elaborate or shorten text in the Description field of a business application		✓			

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Capability	now_assist_explorer_user	sn_apm.apm_user	sn_apm.apm_read	now_assist_explorer_user	Notes
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_user	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 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.

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Capability	now_assist_explorer_user	now_assist_explorer_admin	now_assist_explorer_app_owner	now_assist_explorer_app_admin	now_assist_explorer_app_owner_admin	Notes
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 Now Assist 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 Now Assist 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.

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	now_assist_explorer_user	now_assist_explorer_admin	now_assist_explorer_app_owner	now_assist_explorer_app_admin	now_assist_explorer_app_owner_admin	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 Center must be

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Capability	now.ai_assist_explorer.admin	now.ai_assist_explorer.approver	now.ai_assist_explorer.author	now.ai_assist_explorer.user	Notes
					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 Now Assist for Enterprise Architecture (EA)
- Configure AI Data Explorer and Query Generation skills
- Now Assist for Enterprise Architecture (EA)
- Enterprise Architecture Workspace access roles
- Enterprise Architecture AI agent generate enterprise architecture diagram agentic workflow

Using Now Assist for Enterprise Architecture (EA)

With the Now Assist for Enterprise Architecture (EA) application, you can summarize Architectural decision records (ADR) and help gather insights into business applications in the Enterprise Architecture Workspace.

You can use Now LLM Service, Now LLM Long Term Stable models (LTS), Azure OpenAI, Google Gemini or Anthropic Claude on AWS as the AI model provider for all Now Assist 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 Now Assist Admin console. For more information, see Large language models on the ServiceNow AI Platform®.

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Elaborate or shorten content in the Architectural Decision Records (ADRs)

Elaborate or shorten the Architectural Decision Records (ADR) content using the Now Assist in the Enterprise Architecture Workspace.

Before you begin

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

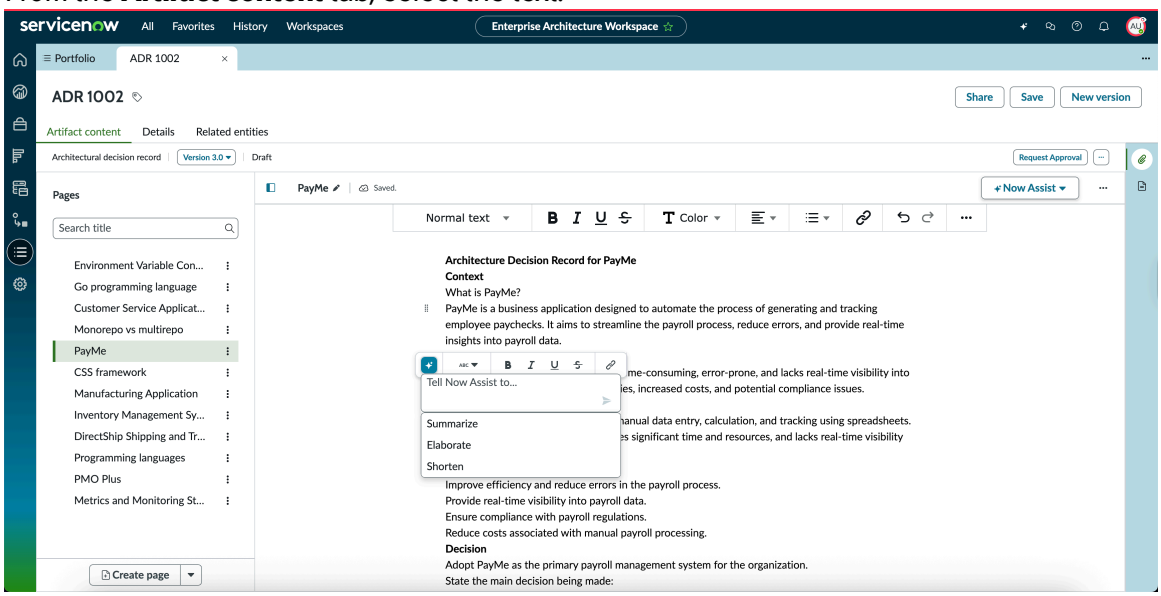
Note: The ADR feature in Enterprise Architecture Workspace uses the ServiceNow Docs component (sn_docs) to create pages in the Artifacts section. Docs component v6.0.0 is automatically installed with Enterprise Architecture Workspace v3.4.0.

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.

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 **Now Assist** icon from the context menu to perform any of the following tasks.
   - Text box: Use the text box to enter any prompts and derive the required information from the Architectural Decision Records (ADR) artifact content.
   - **Summarize**: Summarizes the entire ADR doc content or the selected text.

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- **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

Generate a summary for Architectural Decision Records (ADRs)

Add or edit an architectural decision record (ADR)

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 Now Assist in the Enterprise Architecture Workspace. Minimize the time that you spend in reading large Architectural Decision Records (ADR) artifacts that helps you to understand the background of a specific architectural decision by using a summary that is generated by Now Assist.

Before you begin

Note:

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

You can use Now LLM Service, Now LLM Long Term Stable models (LTS), Azure OpenAI, Google Gemini or Anthropic Claude on AWS as the AI model provider for all Now Assist 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 Now Assist Admin console. For more information, see Large language models on the ServiceNow AI Platform®.

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 helps to quickly generate a summary of the content in the ADR document. It helps you to save time in reading large documents by generating a quick summary of it.

You can also use the text field to ask a question about the Architectural Decision Records (ADR) 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 **Information Portfolio**.

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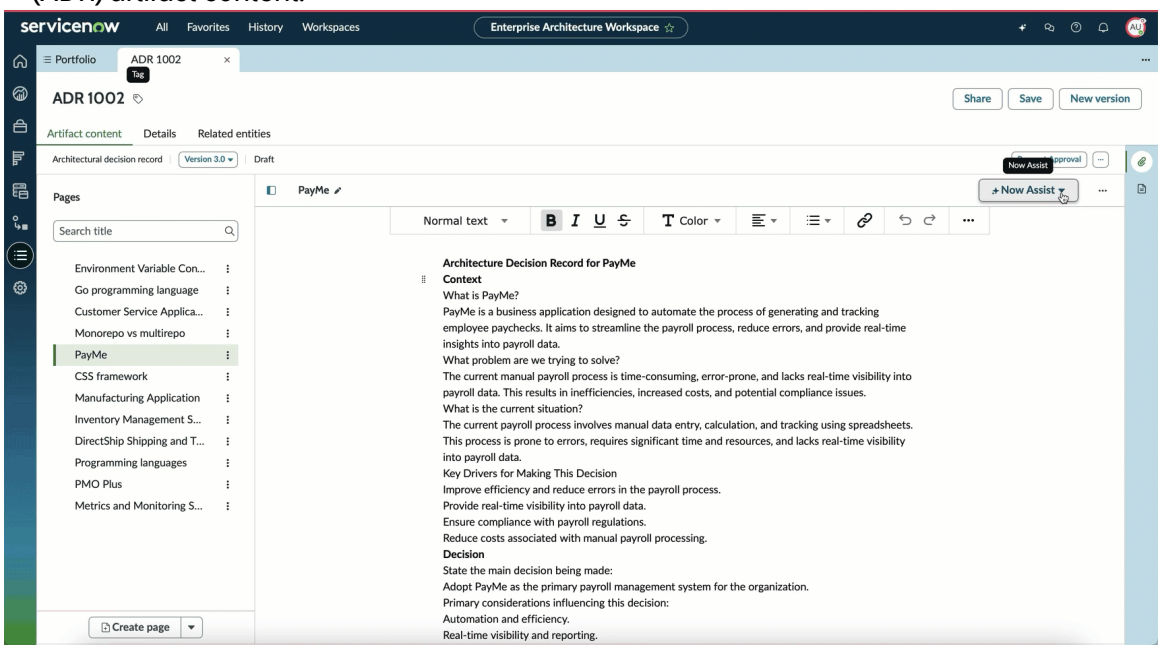
4. Select **Architectural Decision Records**.
5. Select the ADR that you want to summarize the content for.
6. In the **Artifact content** tab, select **Now Assist** drop-down menu and then use either of the following options.
   - Text box- use this option to ask any question related to the Architectural Decision Records (ADR) artifact content and get the required information. This option helps you get a particular information about the ADR content.

     Example queries:

     - What is the problem being solved?
     - What are the limitations for implementing this business application?
   - **Summarize**- use this option to generate a summary of the Architectural Decision Records (ADR) artifact content.



7. Select **Done** to complete the summarization.
   You can also copy the summarized text.

Related topics

Elaborate or shorten content in the Architectural Decision Records (ADRs)

Add or edit an architectural decision record (ADR)

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 Now Assist 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

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

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You can use Now LLM Service, Now LLM Long Term Stable models (LTS), Azure OpenAI, Google Gemini or Anthropic Claude on AWS as the AI model provider for all Now Assist 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 Now Assist Admin console. For more information, see Large language models on the ServiceNow AI Platform®.

Note: The Business application insights Now Assist skill is currently not supported by the Now LLM Long Term Stable models (LTS) AI model provider.

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. Help minimize the time that you spend to learn about critical details of business applications like purpose, risk, cost, and recommendations for rationalization.

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** > **Now Assist Admin** > **Skills** > **Now Assist Skills** > **Technology** > **EA** > **Business application insights** > **Choose input**. For more details, see Configure Now Assist 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:

- 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 and mention that the application is also 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

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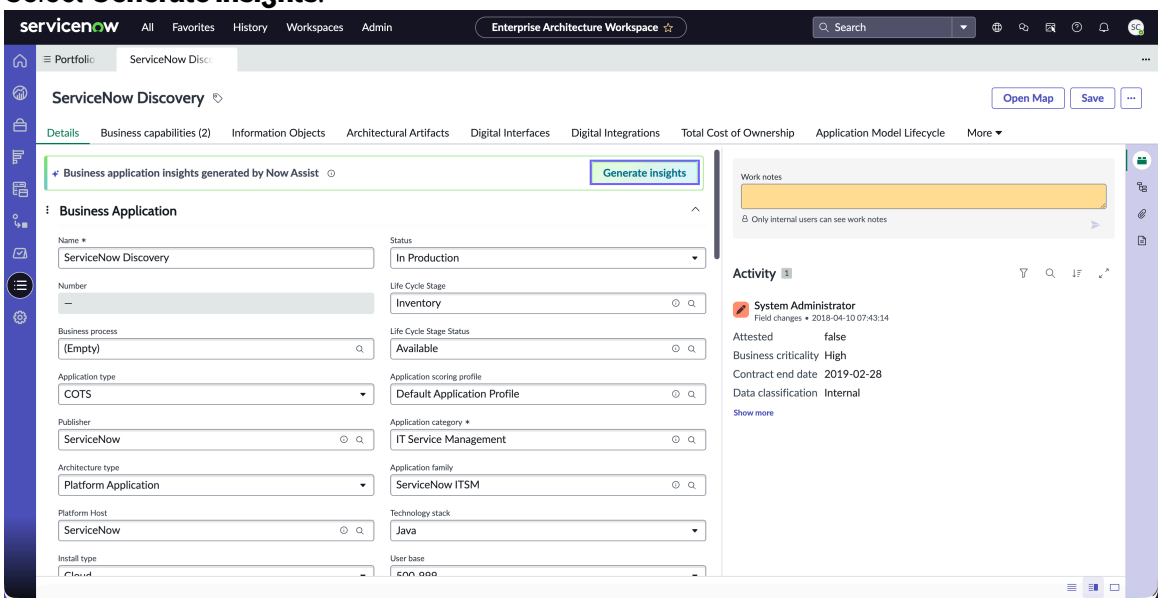
  - Axis information: Which metrics are plotted on the X and Y axes for the business application
  - Quadrant position: Which quadrant the business application is positioned in (for example, top-right quadrant)
  - Bubble size: Metric configured for bubble size
  - Planned disposition: If set for the business 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 are generated using only the default configuration fields and lists without additional contextual data. For information on the default configuration, see Configure Now Assist 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.

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. Select **Generate insights**.



The insights for the business application are generated.

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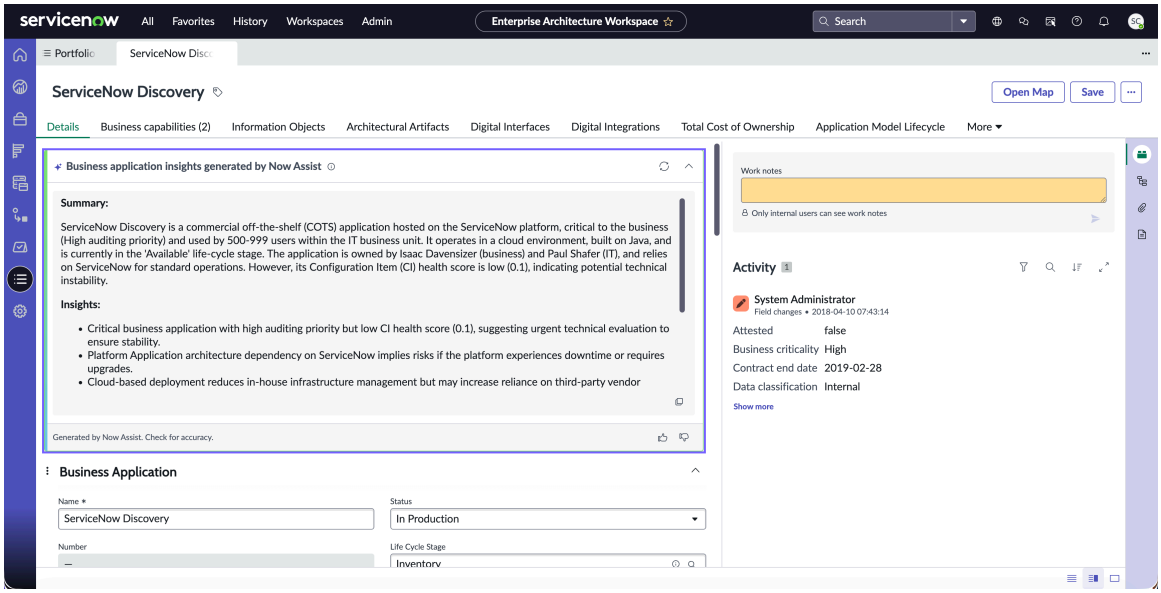
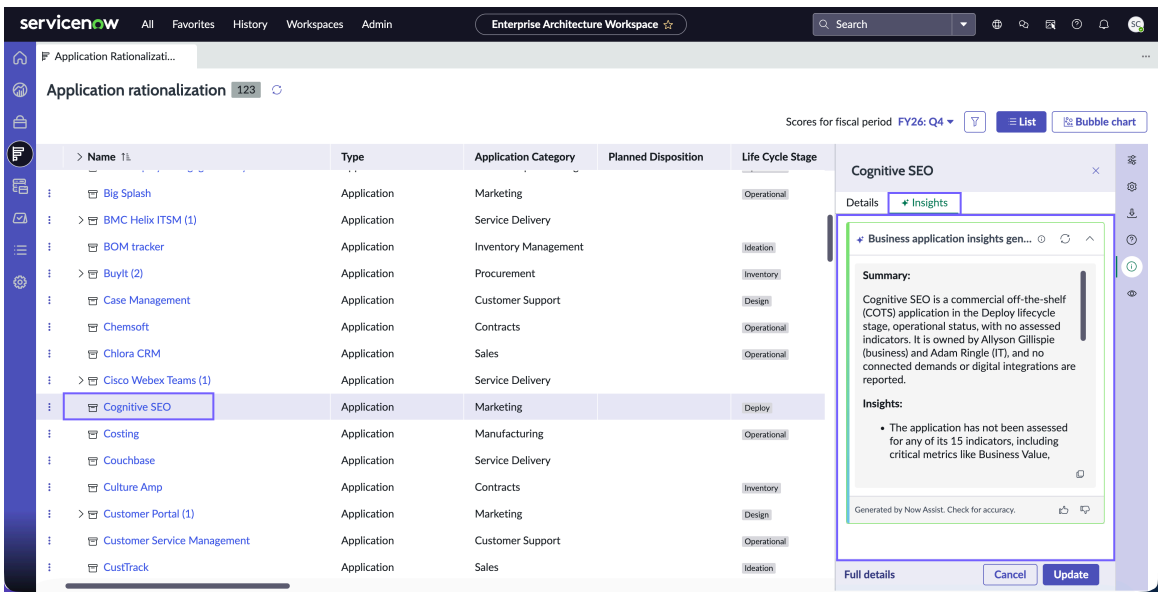


You can also view insights into a business application wherever business application details are displayed in a side panel, for example of the application rationalization page.



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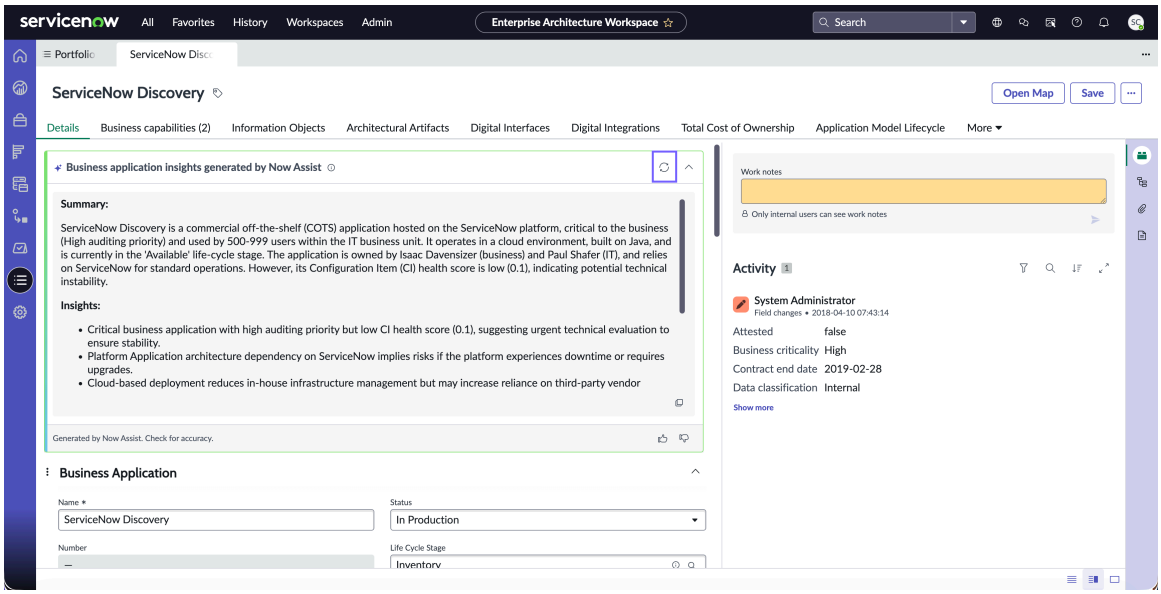
7. Generate a new version of the business application insights by selecting the Refresh icon , in case you changed any details associated with the business application.



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

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 Now Assist in the Enterprise Architecture Workspace.

Before you begin

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

You can use Now LLM Service, Now LLM Long Term Stable models (LTS), Azure OpenAI, Google Gemini or Anthropic Claude on AWS as the AI model provider for all Now Assist 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 Now Assist Admin console. For more information, see Large language models on the ServiceNow AI Platform®.

Role required: sn_apm.apm_read and sn_apm.apm_user role

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-

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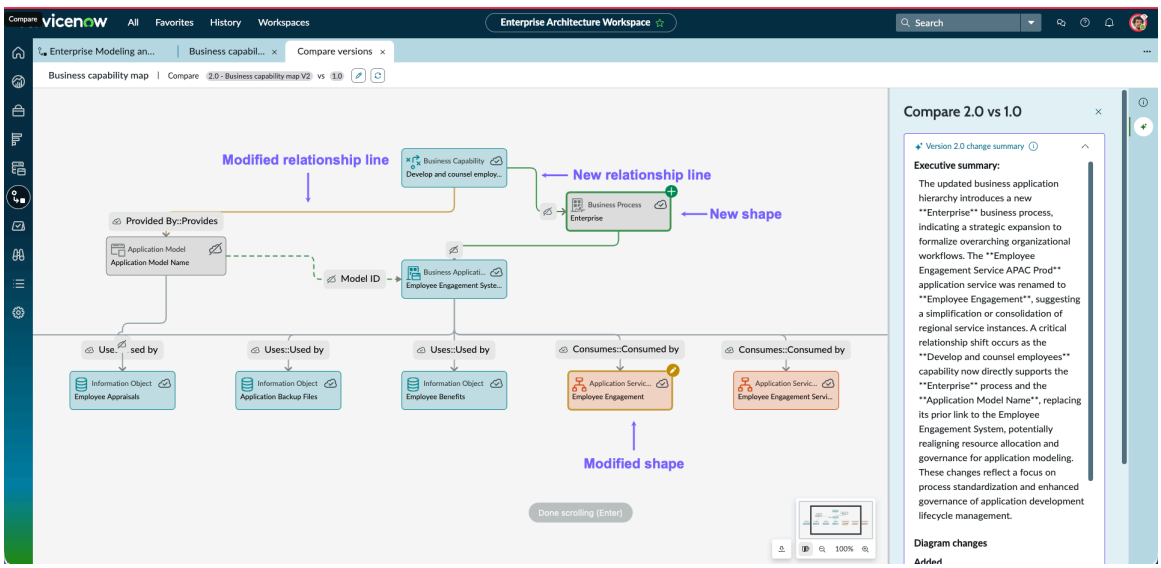
consuming or error-prone. Using the diagram change analysis Now Assist skill, you can quickly generate a change summary.

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 Now Assist 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.
- 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.

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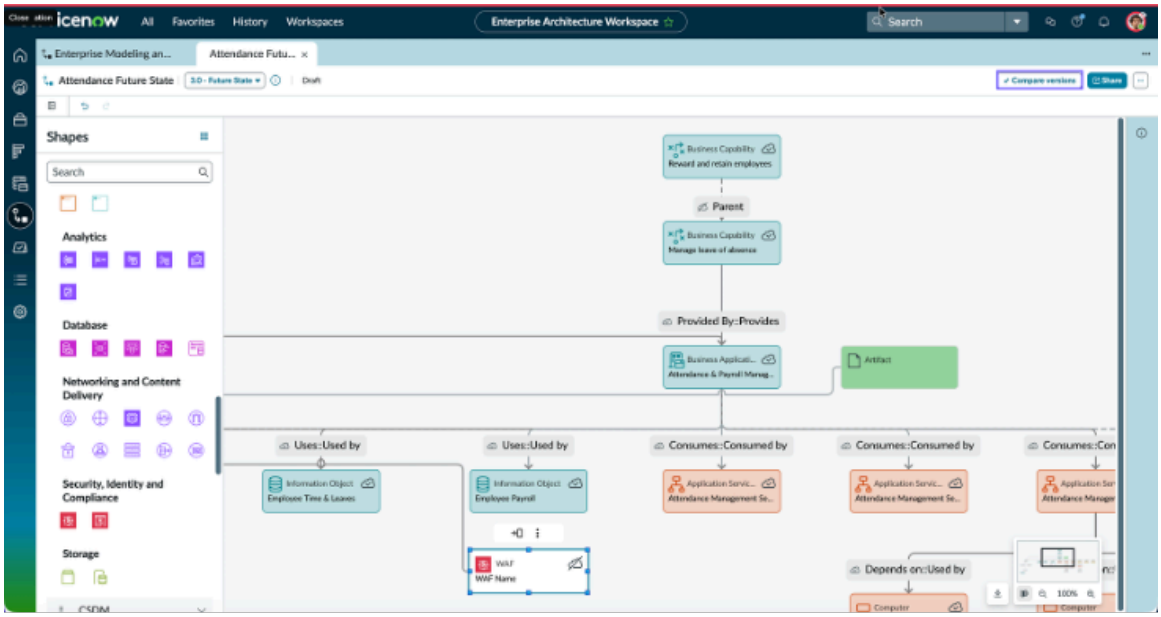
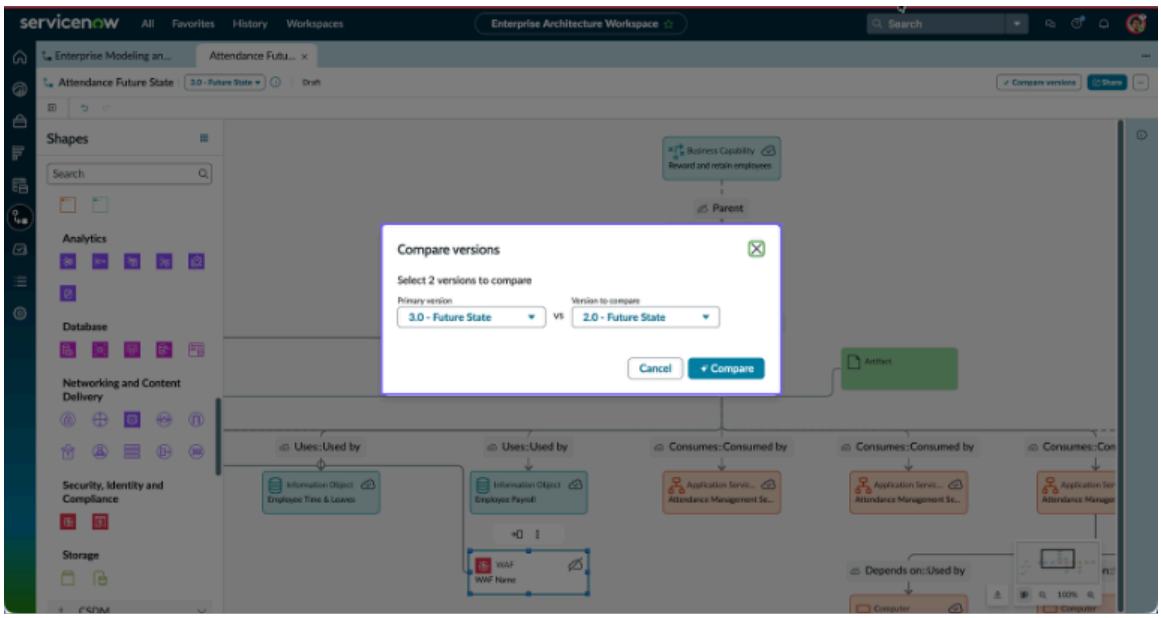


The **Compare versions** pop-up window appears.



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 Now Assist side panel. The Now Assist side panel displays the following sections:
   - **Executive summary**: A Now Assist 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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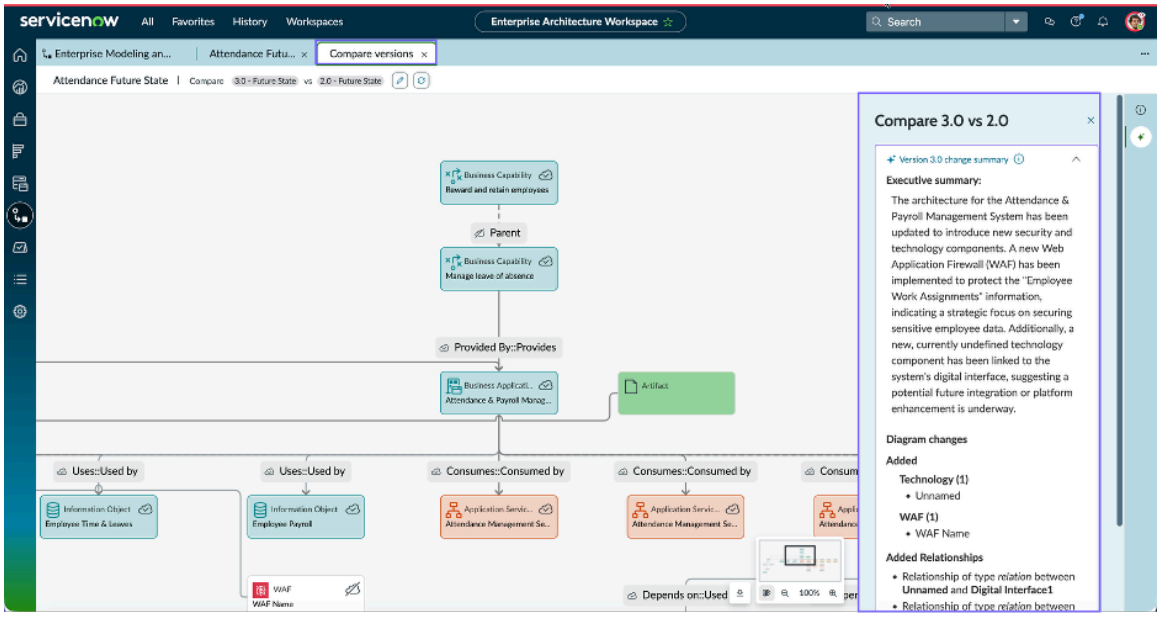

Note:

- Select the edit icon ( ) in case that you want 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 Now Assist. This feedback helps Now Assist to generate better change summaries.
- Select the copy summary icon ( ) to copy the diagram change summary created by Now Assist.
- Select the Now Assist icon ( ) to close the Now Assist side panel.

Elaborate or shorten content in form fields

Elaborate or shorten text in the description or reasoning fields in forms using Now Assist 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

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

Role required: sn_apm.apm_user

About this task

Description and reasoning fields often require clear, concise, and contextually accurate information. You can use Now Assist 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:

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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**.

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.

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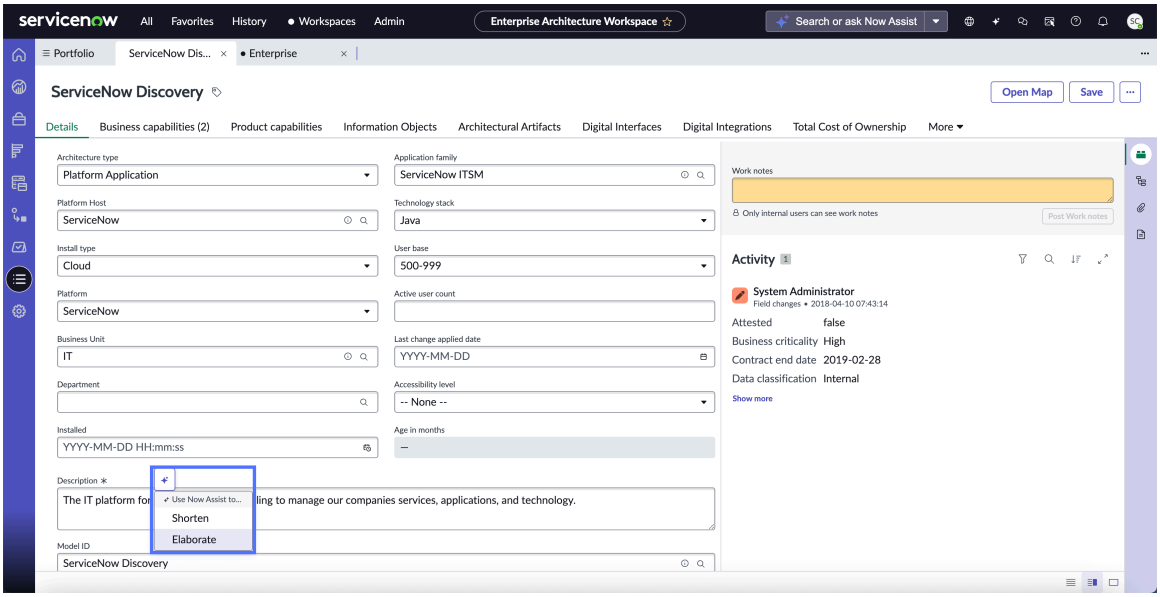

7. Select the **Reasoning** field to perform any of the following tasks.
   - Text box: Use the text box to enter any prompts and derive the required information from the existing business application content.
   - **Elaborate**: Elaborates the selected text.
   - **Shorten**: Shortens the selected text.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

Generate insights for Enterprise Architecture Workspace dashboard widgets

You can use the conversational interface provided by AI Data Explorer Now Assist 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

AI Data Explorer, Query Generation Now Assist 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:

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- 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.

- 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 cannot 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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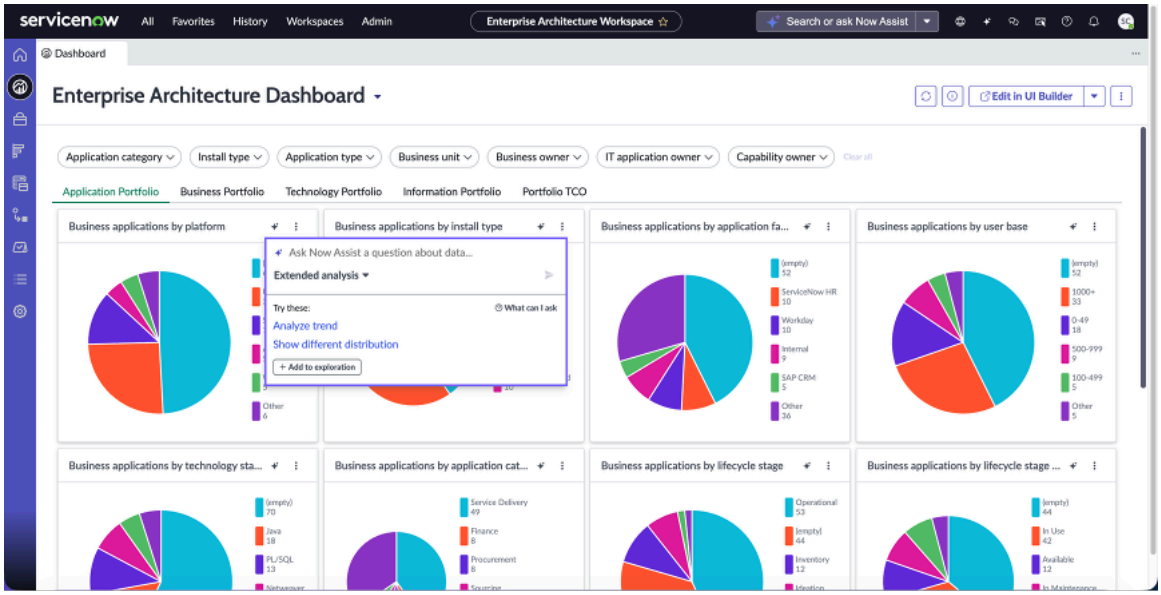

3. On the pop-up window, perform any of the following options.

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 Now Assist to gener ate 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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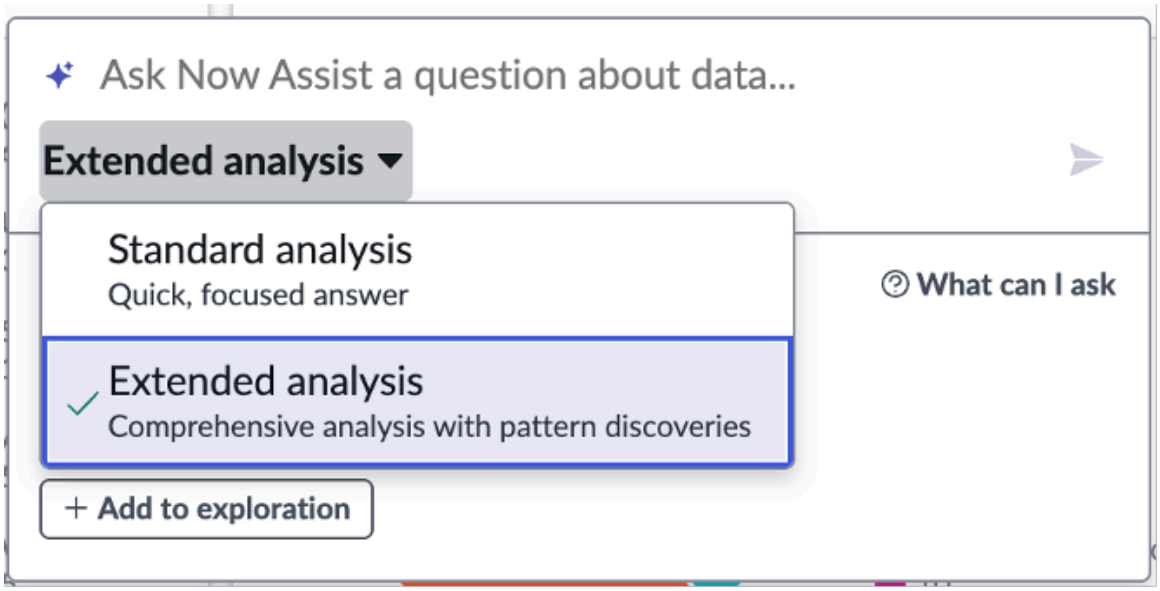
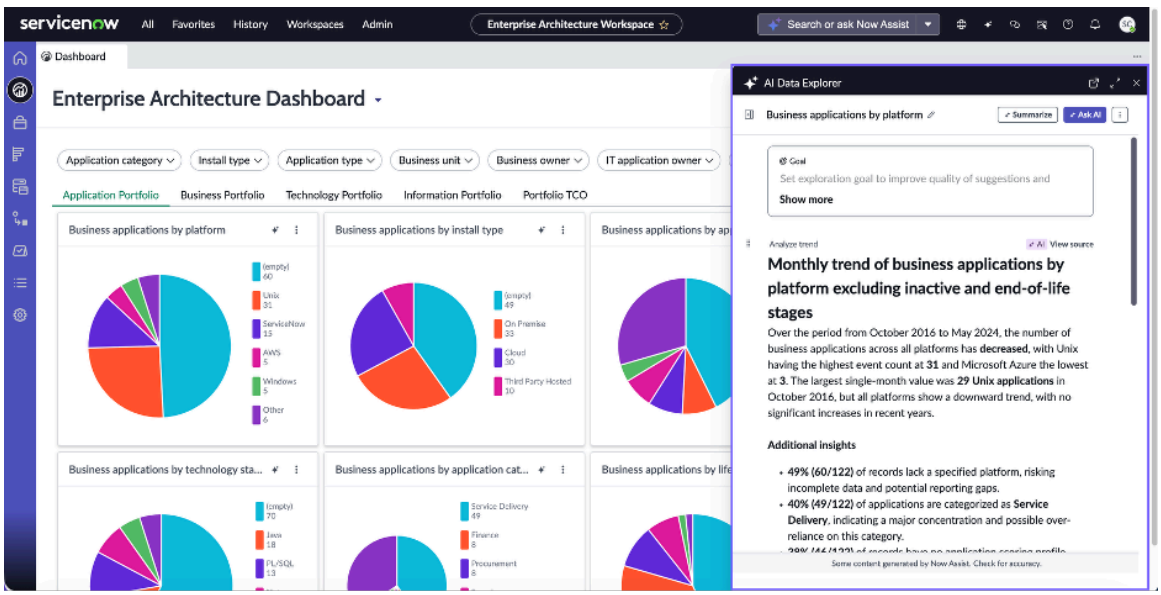


4. Enter your query or select any of the available options.
   The AI Data Explorer pop-up window appears displaying insights on the widget data. It also generates graphs or charts to complement the insights.



5. View the AI Data Explorer insights and take further actions.
   You can perform the following:

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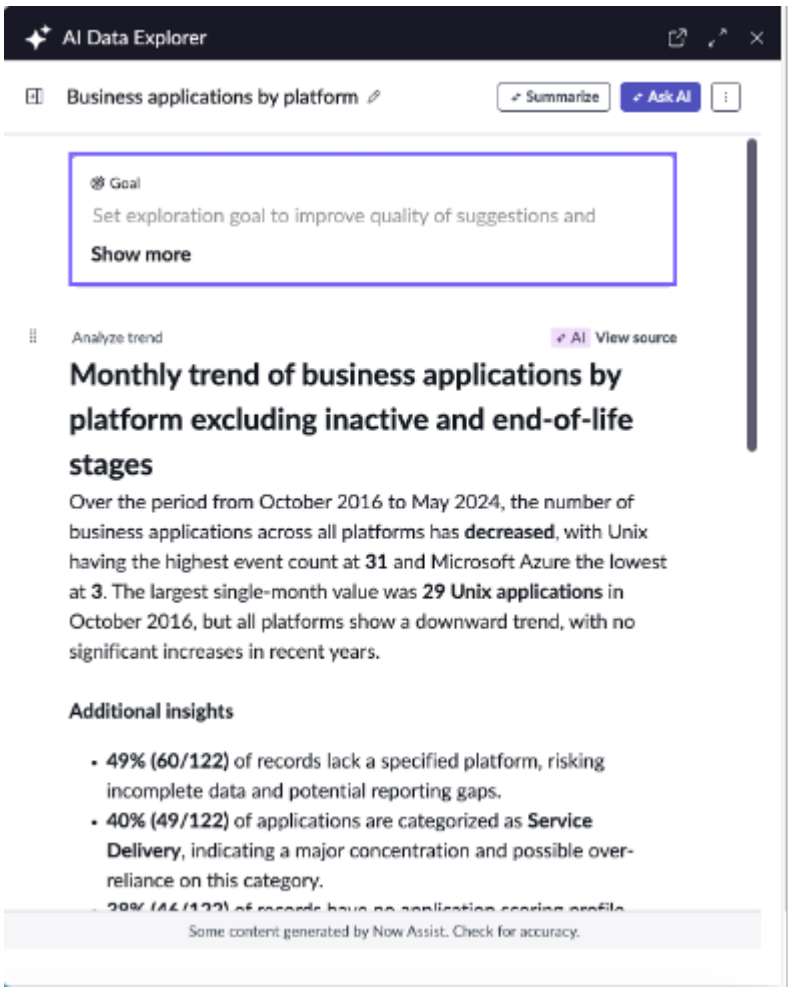
- Define a goal in the **Goal** box for Now Assist to improve the quality of insights and suggestions.



- Ask follow-up questions based on suggestions provided by Now Assist

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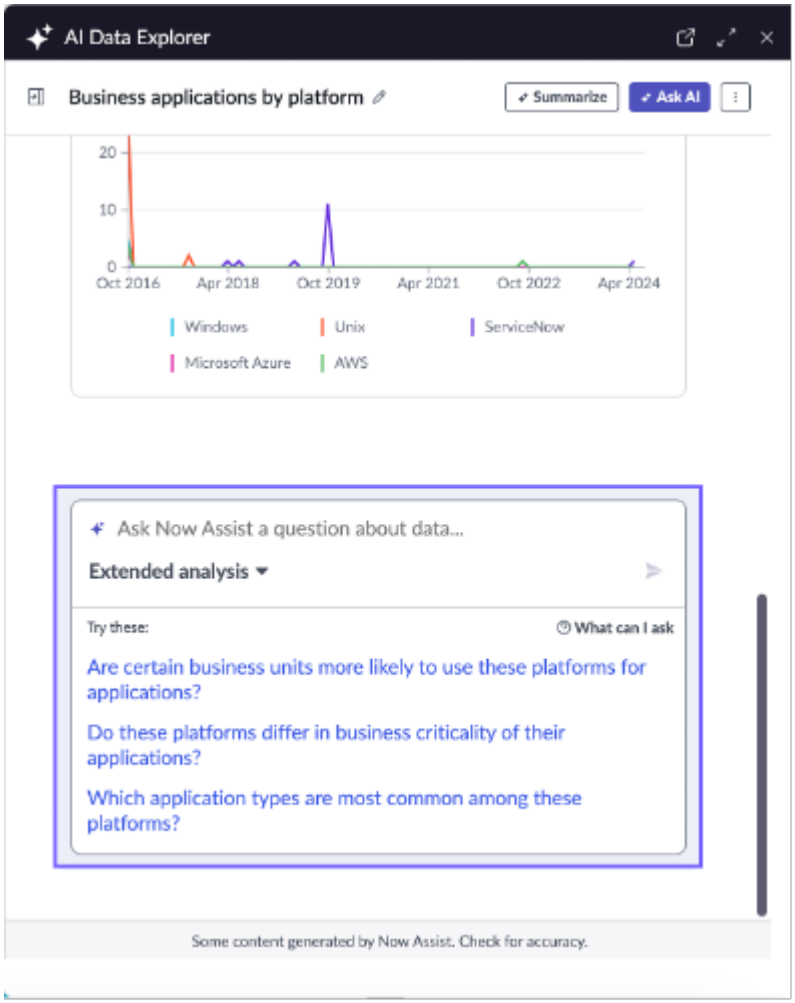

- Select **Summarize** to summarize the insights generated.

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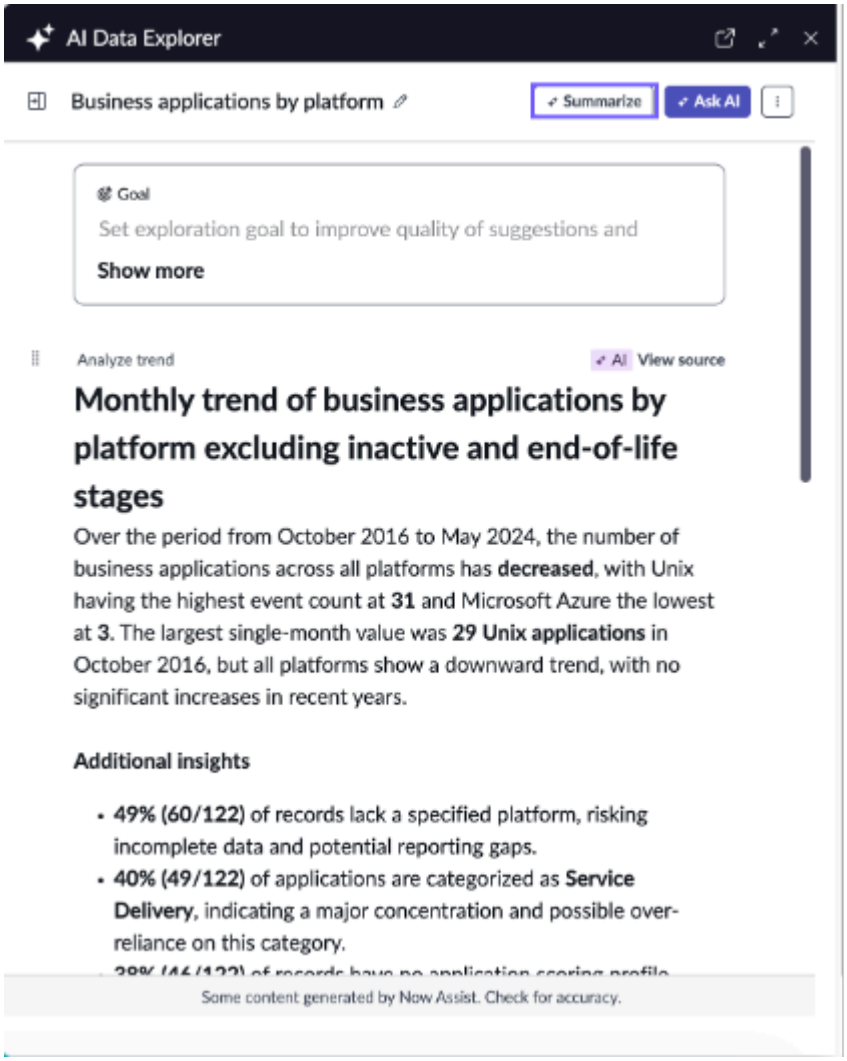

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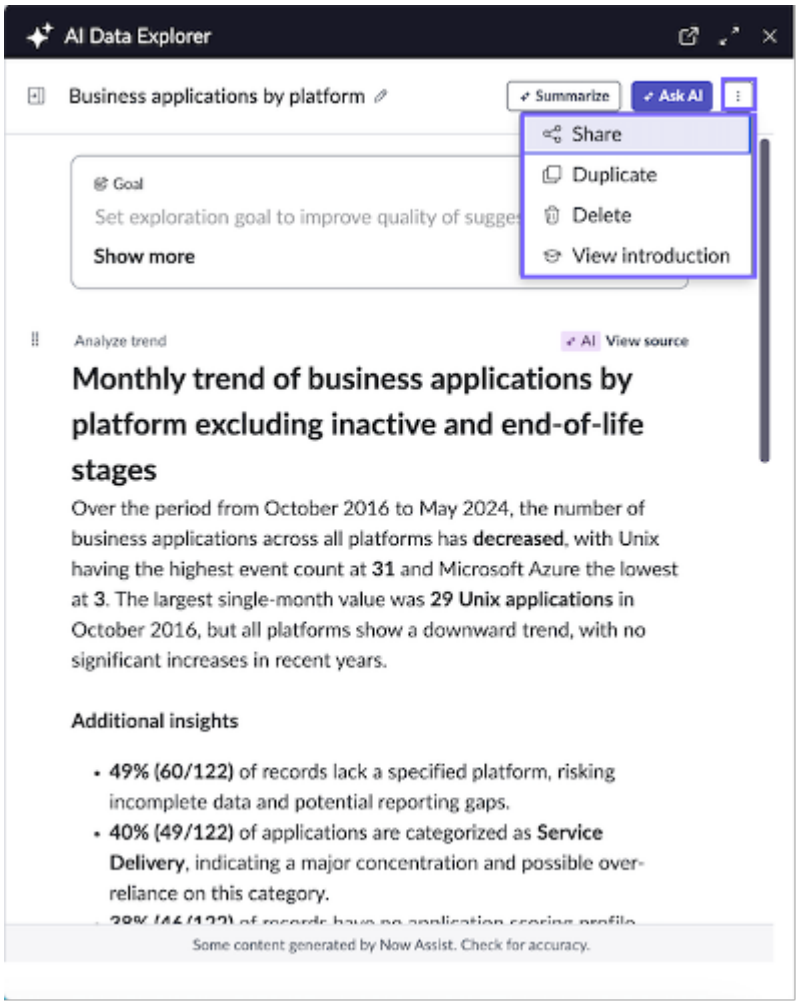
- Share, duplicate, or delete the insights generated by AI Data Explorer by selecting the more actions icon (⋮).



Related topics

Configure AI Data Explorer and Query Generation skills

Explore the Enterprise Architecture Workspace dashboard

Register a business application by using the conversational experience

Use the conversational experience of Now Assist in Virtual Agent to register a business application from any application that supports Virtual Agent.

Before you begin

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

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 Now Assist for Enterprise Architecture (EA).

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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. Now Assist 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, 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? ○ 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. You can skip answering a question that is

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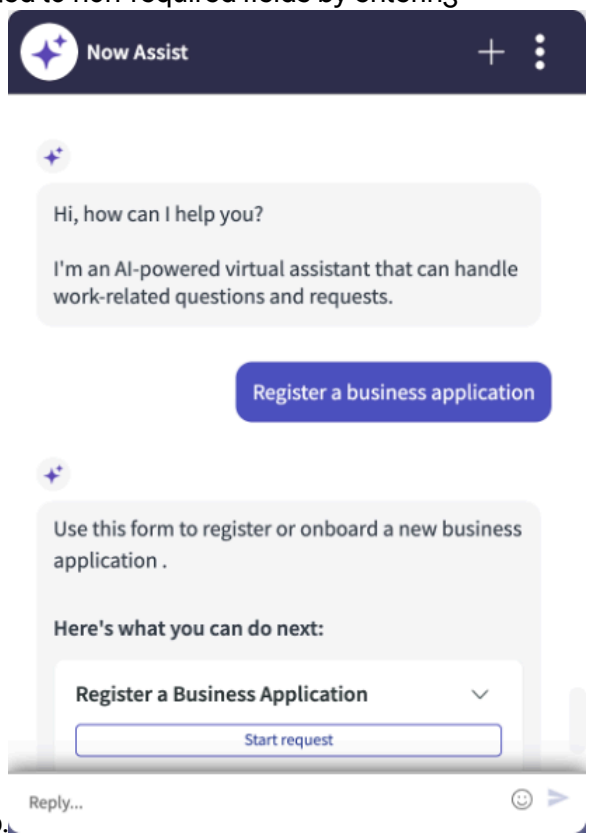
Instruction	Description
	related to non-required fields by entering skip. 
Elaborate: Register the new business application XYZ, which is used for capturing application metrics. Specify Abel Tuter as both the business application owner and IT owner. Also, category of the business application is Business 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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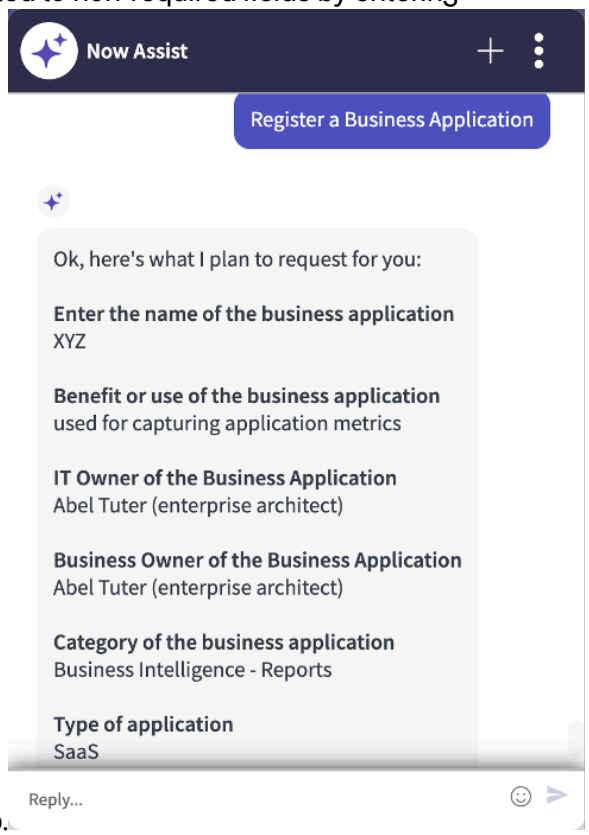
Instruction	Description
	You can skip answering a question that is related to non-required fields by entering skip. 

4. Review the information that Virtual Agent filled in for the business application form fields. You can choose to make changes or submit.

Register a digital integration by using the conversational experience

Use the conversational experience of Now Assist in Virtual Agent to register a digital integration from any application that supports Virtual Agent.

Before you begin

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

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 Now Assist 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. Now

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Assist 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, 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 business application** 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 busi ness application, through a series of ques tions: ○ What is the name of the business applica tion for which you want to subscribe? ○ What is the business application you're re questing 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 integra tion you would like to enter? The information you provide is used to fill in the fields of the digital integration form. You can skip answering a question that is

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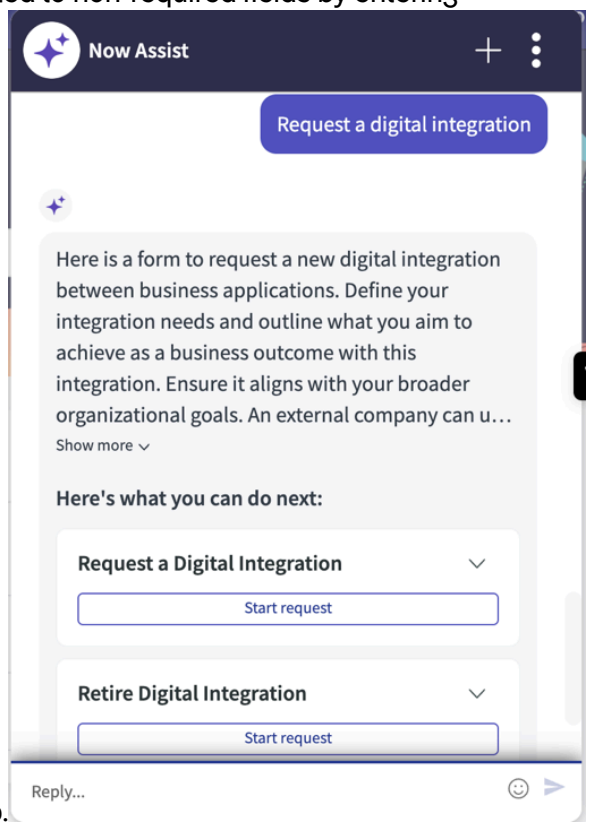
Instruction	Description
	related to non-required fields by entering **skip**. 
Elaborate: Request the new digital integration for the subscriber business application BuyIt and provider business application is Case Management.	Using the context that you provided, Virtual Agent automatically matches it 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. You can skip answering a question that is related to non-required fields by entering **skip**.

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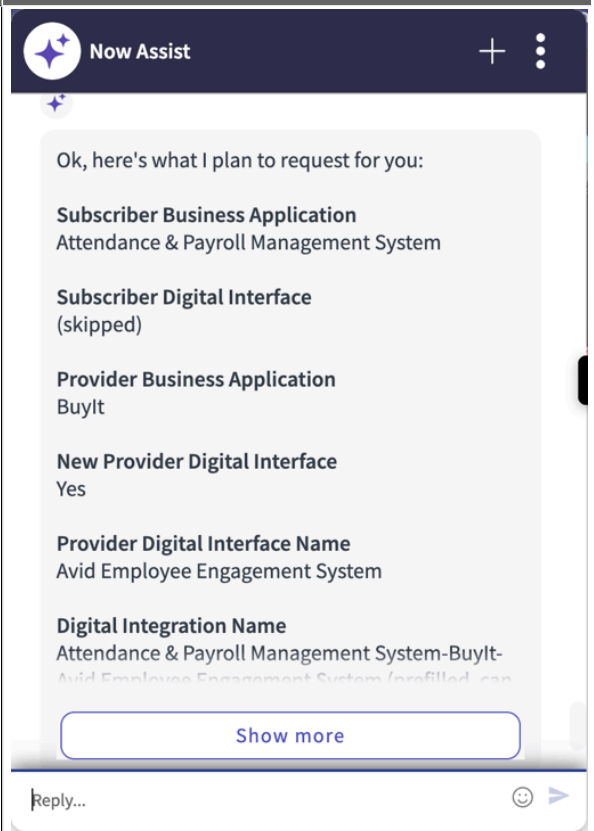
Instruction	Description
	

4. Review the information that Virtual Agent filled in for the digital integration form fields. You can choose to make changes or submit.

Using AI agent agentic workflow in Now Assist for Enterprise Architecture (EA)

Use the AI agents in Enterprise Architecture to help complete tasks autonomously.

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

Looking for an AI agent?

- There might be AI agents installed with the Now Assist application that are not used in agentic workflows. To learn how to see all agents that are available on your instance, see Find AI agents.
- To find agents that might not be installed on your instance, visit the AI Agent Marketplace on the ServiceNow Store.

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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 agentic workflow. For information, see duplicate the agentic workflow. Then proceed with the following steps:

- Activate the agentic workflow.
- Activate all agents in a agentic workflow.To invoke the Generate enterprise architecture diagram agentic workflow, you can ask for a business hierarchy diagram for a specific entity through the Now Assist panel.

To view more information on AI agents and how to install them, see the following:

- Now Assist AI Agents
- Install Now Assist AI Agents
- AI Agent Studio

Enterprise Architecture AI agent generate enterprise architecture diagram agentic workflow

Use the Enterprise architecture diagrams AI agent to generate Enterprise Modeling and Visualization diagrams for business applications hierarchy and summarize them.

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 Now Assist 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 Now Assist panel. If you want to change instructions for this agentic workflow, you must duplicate the agentic workflow, adjust the settings to suit your specific needs, and activate the duplicated version of the agentic workflow instead. For information on how to duplicate a agentic workflow, see duplicate the agentic workflow.

Important:

- The Now Assist Panel user role (now_assist_panel_user) is required to view the Now Assist 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.

Role masking enables users to limit the roles and privileges of agentic workflows during tool execution. Agentic workflows and their AI agents that get installed with Now Assist applications

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are assigned pre-defined roles. If you select *Users with specific roles* for user access, you must configure the security controls to include these roles. Data access settings must also include these roles. For the instructions to change the security controls, see Define security controls for an agentic workflow.

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:

1. Select the Now Assist 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 key requirements page, in the **Define who can access this agentic workflow** 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 Now Assist for Enterprise Architecture (EA). For information on how to change the application scope, see Select an application from the application picker.
2. Select the edit icon ( ).
3. On the Access Control page, in the **Requires role** section, select **Insert new row**.

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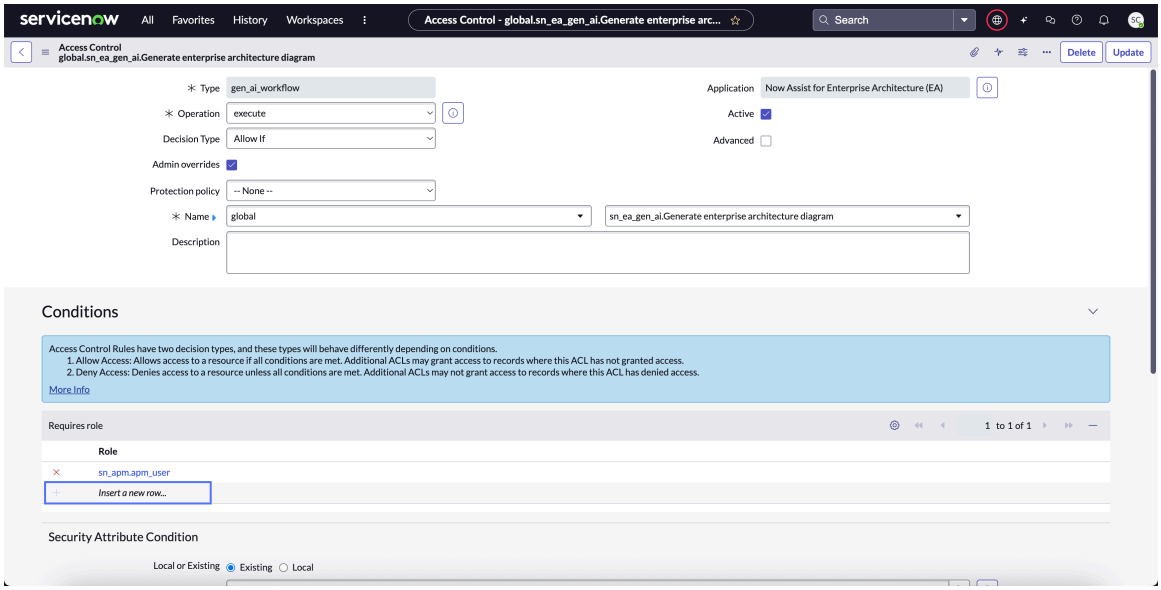
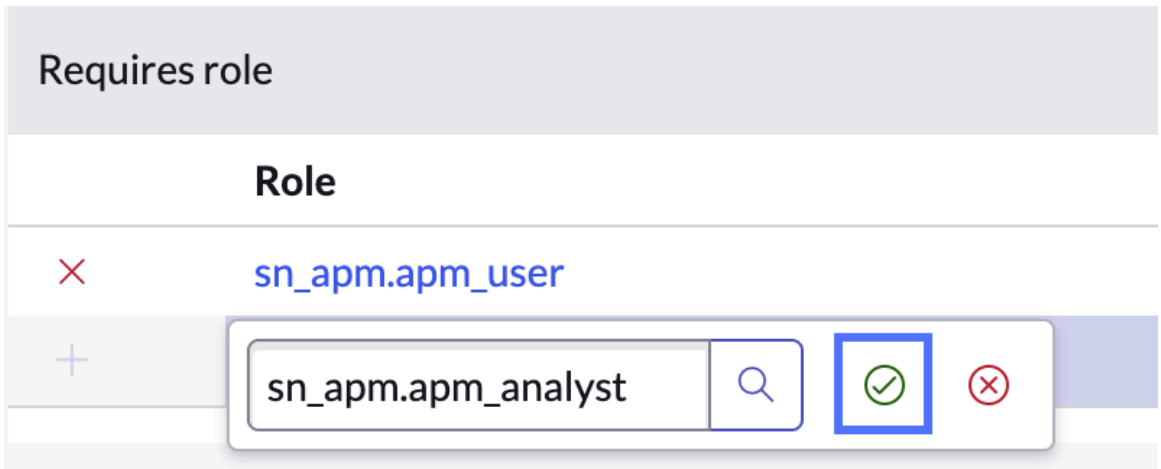


4. On the pop-up window, enter the new role and select the save icon ( ).



5. Select the header of the access control record and select **Save**.

   The new role is added to the **Define who can access this agentic workflow** section of the Define key requirements page.

   Note: To know more about security in Now Assist AI agents with Access Control Lists (ACLs), see Implement access control in Now Assist AI agents.

Also, on the Select a UI display page, do the following:

1. Enable the **Display** toggle.
2. Select **Save and test**.
3. On the Choose and AI agent or agentic workflow 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 **Start Test**.

   The agent executes the request for the agentic workflow.

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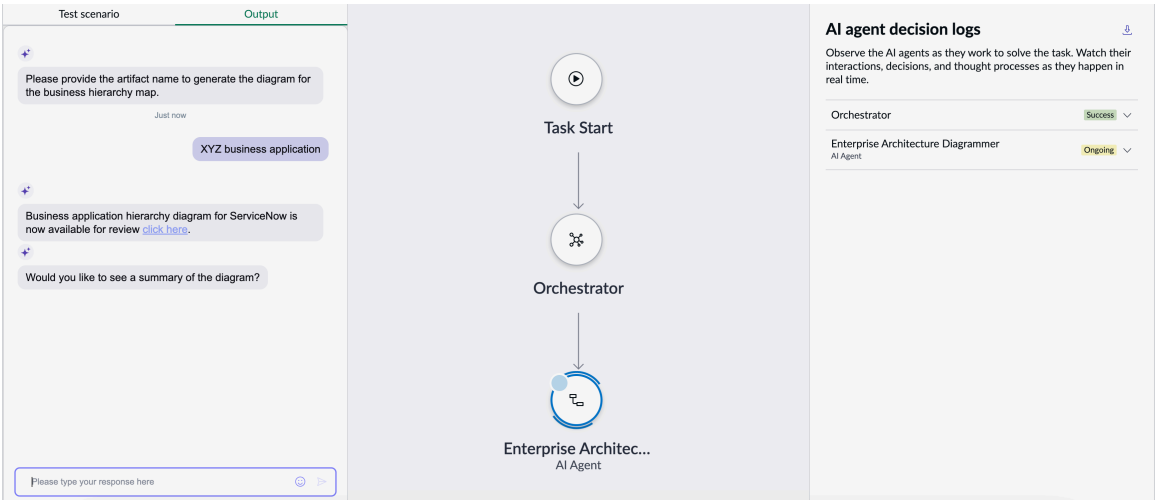

To view information on how to create AI agents and agentic workflows and how to use the AI Agent Studio, see the following:

- AI Agent Studio
- Install the AI Agent Studio
- Install Now Assist AI Agents
- Configure Now Assist 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

Now Assist for Enterprise Architecture reference

Reference information to provide additional information about tables, roles, and properties installed with Now Assist for Enterprise Architecture (EA).

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