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Zurich Impact

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Impact

ServiceNow Impact is built on the ServiceNow AI Platform and combines customized service with a digital interface to help you realize the full potential of your instance. Receive tailored recommendations and guidance from dedicated teams and experts on demand.

Get started

Exploring Impact



Explore Impact features to help you realize the full potential of your instances.

Using Impact



Use an updated interactive Impact program where you can access your Impact tools and benefits.

Configuring Impact



Learn how to setup and configure Impact.

Impact Reference



Learn about Impact components, such as plugins, tables, and roles.

Additional resources for Impact



Explore additional resources for learning about Impact.

Exploring Impact

ServiceNow Impact personalizes your digital transformation journey and accelerates your time-to-value integrated within your ServiceNow AI Platform instance and Impact.

Impact overview

ServiceNow Impact is a customer success product that helps you to leverage the power of the AI Platform for your business transformation. Impact provides the support and expertise to:

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- Adopt ServiceNow products, including Now Assist, and measure their value.
- Gain access to expert guidance with technical, strategic, and personalized recommendations.
- Maintain a high-performing platform ready for growth.
- Enhance business continuity with 24x7 technical support.

Track progress against your outcomes, share insights and industry benchmark comparisons, and make data-driven decisions to optimize your digital transformation journey. Enable proactive management of instance quality, compliance, and performance with platform health.

Impact platforms

Impact program features are shared between the Impact Delivery Instance and the Impact Store Application. Variations in navigation, feature configuration, and usage are detailed in the specific topics.

Impact Store Application

ServiceNow Impact is a customer success product that helps you to leverage the power of the AI Platform for your business transformation. Impact provides the support and expertise to:

Track progress against your outcomes, share insights and industry benchmark comparisons, and make data-driven decisions to optimize your digital transformation journey.

Use Quicklinks to access additional tools and benefits in your Impact Delivery Instance application.

See the Impact overview video to get started with the Impact Store Application.

https://url.us.m.mimecastprotect.com/s/LWvqCR6VlBfnyj1myF9f8i1xSv_?domain=player.vimeo.com

Impact Delivery Instance

- Your Impact squad interactive space.
- The provider for data synced with the Impact Store Application.
- Existing data from the Impact IDI is migrated at setup to the Impact Store Application to ensure that critical information is integrated within your ServiceNow instance.
- Impact Store Application: The customer instance where the Impact Store Application is installed and is accessed in addition to the Impact Delivery Instance portal.

  See the Impact overview video to get started with Impact.

  https://player.vimeo.com/video/982119213?badge=0&autopause=0&player_id=0&app_id=58479

Note: Portions of Impact may not be available to customers in the FedRAMP, NSC DOD IL5, or Australia IRAP-Protected data centers, to self-hosted customers, or in other restricted environments, or to managed service providers (except for their internal#use)

Impact operating model

The Impact operating model is a research-backed system of key activities, personalized to your organization, to help drive faster time to value with the ServiceNow platform.

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Delivered by your Impact Squad, our unique operating model includes a fit-for-purpose set of Initiatives to start you on the fast track to value.

- Stay focused on your strategic vision with personalized outputs and recommendations.
- Help prevent distractions with regular platform health, operational, and performance reviews.
- Enjoy flexibility to add business outcomes, reprioritize objectives, and adapt to the needs of your organization.

The Impact program is comprised of two phases, Foundations and Steady State. Foundations kicks off the experience and defines the value baseline, and the Steady State cadence keeps you on track with your Impact plan and associated business goals.

Impact Foundations

Connects vision to action by baselining your current state and giving you a tailored plan to quicken your time to value. Foundations lays the groundwork for every action you take on the platform.

Impact Steady State

Impact's standard initiatives are executed in consistent, timely intervals to keep you on pace.

ServiceNow Impact packages comprise support tools, self-help resources, human-led engagements, and credits, discounts, and additional benefits made available to you depending on the level of Impact package procured. For information about Guided, Advanced, and Total packages, see Impact packages.

Impact packages

ServiceNow Impact packages comprise support tools, self-help resources, human-led engagements, discounts, and additional benefits made available to you depending on the level of Impact package procured.

There are two subscription packages for Impact: Guided and Total. Regardless of the package, all Impact customers get:

- A great digital experience with value realization dashboards and intuitive journey builders.
- Personalized learning and coaching with curated content and tailored learning aligned to your roadmap and role.
- A smart recommendation engine that provides proactive insights, prescriptive alerts, and custom recommendations.

Descriptions

If you have purchased an Impact offering, the applicable Impact Package description applies to your purchase. See the Legal Schedules for Impact for additional information at https://www.servicenow.com/legal/servicenow-impact.html.

Guided

- Entry-level offerings including the Premium digital experience, enhanced technical support, and curated content.
- Impact Squad: Customer Success Manager

Total

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- The complete solution with a designated expert team, personalized recommendations, preventative tools, and much more.
- Impact Squad Team: Customer Success Executive, Platform Architect, Customer Success Manager, and Support Account Manager

Accelerator consumption per Impact package

Depending upon the Impact package that you have purchased, there's an allotment of how many Accelerators from each sub-catalog that can be consumed consecutively. See Accelerator catalog for additional information on Accelerators and sub-catalogs.

The below consumption allocations apply to all variations (for example, US PubSec, MSP Dedicated) and versions (for example, V3 & V4) of Impact packages, unless otherwise specified.

Package	Description	Accelerator Consumption
Guided	Entry-level offerings including the Premium digital experience, enhanced technical support, Impact Squad Customer Service Manager (CSM), and curated content	1 at a time across all sub-catalogs
Total	The complete Impact solution with a designated expert team, personalized recommendations, preventative tools, and much more.	6 total (2 of each sub-catalog concurrently at a time)

Customer agreements and terms

For customer agreements and terms, refer to the applicable Impact Accelerator description available at#https://www.servicenow.com/legal/servicenow-impact.html .

Add-on packages

Add-on packages introduce flexibility for Impact customers and are available in all environments where Impact is available. Add-On packages will be sold to all Impact customers and are priced on a per SKU, per year basis, with each Add-on priced separately with distinct entitlements.

Available Add-on SKUs

Name	Entitlements
Strategic Value	• Upgraded Value IDI • Two additional Strategy Accelerator Catalog concurrencies • Additional CSM coverage
Platform Governance	• Upgraded Health IDI • Two additional Architecture Accelerator catalog concurrencies • Additional CSM coverage

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Available Add-on SKUs (continued)

Name	Entitlements
Managed Support	• Upgraded P1/P2 level issue initial target response times • Additional SAM coverage on 1 instance • Five Developer Support seats
Overview of Instance Observer Features	• A rolling 6-month period of performance and availability monitoring of the platform, application, and infrastructure hosting Customer's instance with reporting capabilities • Ability to set self-service alerts, notifications, and analyze data
Instance Observer Seats	Ten Instance Observer seats, in addition to the procured Impact package For more information, see Overview of Instance Observer.
Preventive Care	Bi-annual deep-dive into the health of production instances • Performance Engineer-led diagnostic • Presentation to customer stakeholders • Guided Remediation
Platform Health	• Unlimited Active Custom Definitions • Proposed Fix

Note:

- IDI = Impact Delivery Instance
- CSM = Customer Support Manager
- SAM = Support Account Manager

Group Views

Impact enables multiple stakeholder groups within your organization to lead their own digital transformation.

For example, both your IT and Finance departments are able to define their own objectives with Impact and present them to their respective leadership.

A stakeholder group is defined as the following:

- A logical, customer-defined group of customer stakeholders who share objectives for the purposes of consuming the Impact product, for instance, HR and Finance.
- A subset of groups or equal to a single account; a Stakeholder Group may not include multiple accounts.
- An instance could be associated to one or more stakeholder groups.

Key benefits

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- The Impact experience can be managed across your Group Views with the Impact Squad, including stakeholder groups and instances. Your customer homepage is personalized to the stakeholder groups relevant to you.
- Impact helps you accelerate your stakeholder group's objectives and manage value for these groups, including the initiatives and activities that contribute toward your Value Journey.
- Capabilities map is available on an instance level and shows capabilities maps for instances that are associated to stakeholder groups. Work with your Impact Squad to define for which instance a capabilities map will be created.
- Product Adoption Roadmaps can be associated to a stakeholder group making it easier to manage your roadmaps. See Product Adoption Roadmaps for more information.
- You can filter across stakeholder groups and instances and display a combined view of Impact across your organization.

Getting started

Start a conversation with your Impact Squad to learn more and to enable the Group Views functionality.

Note: As a start, this functionality is available to limited customers. Discuss with your Impact Squad to learn more.

Impact Squad

Your Impact Squad is a team of on-demand experts who work with you to take on your teams unique transformation challenges.

Impact Squad Members

Title	Role
Customer Success Manager	Acts as the primary point of contact for curating and coordinating content, best practices, and recommendations aligned with your organizational goals and ServiceNow product mix. Key responsibilities: • Serves as your advocate for business value and orchestration lead across all Impact features and benefits. • Manages delivery of Impact Foundations, Impact Accelerators, and the development and execution of your Impact Plan. • Oversees a diverse customer portfolio, ensuring deliverables align with goals, business objectives, capabilities, and success metrics. • Drives recommendations, addresses roadblocks, provides updates, refines the

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Impact Squad Members (continued)

Title	Role
	Customer Impact Plan, and reports on adoption. • Conducts periodic business reviews, kick-off calls, and regular check-ins with customers. • Coordinates with internal teams (Sales, Product, Support) to resolve issues, mitigate risks, and drive customer success. • Manages critical risks and mitigation strategies through a predefined process, ensuring smooth onboarding for new customers. • Promotes customer advocacy by highlighting success stories and use cases.
Customer Success Executive	An accomplished digital transformation leader who advises on strategy, governance, value management, and program execution to help you achieve desired business outcomes. Drawing on insights from numerous successful engagements, this role specializes in guiding customers through key transformation decisions across the ServiceNow journey. Key responsibilities: • Drives your ServiceNow transformation strategy and roadmap to achieve business objectives. • Identifies the right implementation plan and partner strategy to accelerate outcomes. • Builds governance and operating models that ensure success and drive user adoption. • Applies value management to measure progress and strengthen transformation results. • Serves as a trusted advisor, coordinating ServiceNow experts and resources for enduring success. • Shapes organizational strategy by identifying trends, refining best practices, and aligning delivery approaches with market demands. • Drives operational consistency and excellence by standardizing delivery

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Impact Squad Members (continued)

Title	Role
	methods and ensuring quality with Delivery teams. • Contributes to innovation with cross-functional teams to enhance ServiceNow's offerings.
Platform Architect	Extends beyond technical expertise with proven management consulting and professional services experience to guide you with technology strategy and governance, as well as provide actual solution design and architecture as follows: • Establishes an enterprise-wide technical architecture and implementation strategy to set the foundation for enduring success. • Drives standardization and best practice platform management, enabling you to focus on value delivery. • Institutes technical governance to optimize platform performance and minimize long-term technical risk. • Enables rapid upgrades to new features and innovation that drive new value. • Builds a platform team focused on delivering value and innovation.
Support Account Manager	Provides support services and platform performance management, such as enhanced support and driving activities like operational reviews, performance reports, case management, and more as follows: • Bi-weekly operational reviews • Monthly performance reports • Quarterly periodic support reviews • Case management and escalations • Problem management and reporting • Change management and reporting • Upgrades, patch planning, and oversight

Impact Foundations

Impact Foundations is a fit-for-purpose set of account level initiatives to start you on the fast track to value and to maintain momentum via a streamlined quarterly motion.

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Provides guidance for initial engagement for both new or seasoned customers and sets a baseline analysis of your current state and clear next steps to speed up your time to value, laying the groundwork for every action you take on the platform.

Foundations deliverables

Based on your Impact package, the deliverable outputs may vary:

✓ = Common standardized feature set.

✅ = Includes unique package-specific features

Impact deliverables per package

Impact deliverable	Description	Guided	Advanced	Total
Get started with Impact	Kicks off the onboarding experience and evaluates the current state of the targeted areas for analysis for your ServiceNow Platform.	#	✅	✅
Customer Impact plan	Contains best practices and recommendations based on your organizational goals and ServiceNow product mix curated by your Customer Success Manager.	#	#	#
Product Adoption Roadmaps	View a recommended implementation sequence for your capabilities.	#	#	#
Value management	Identify your high-level goals and tie them to measurable outcomes and success metrics that helps illustrate value over time.	#	#	#
Capabilities maps	See the applications, or capabilities, at your disposal for achieving your objectives.	#	#	#

Getting Started with Impact

A set of activities that help new Impact customers get started with ServiceNow Impact.

About Getting Started with Impact

Get Started with Impact is a bundle of curated activities that help new Impact customers to begin their ServiceNow Impact journey. The following activities are available for Guided customers:

- Impact Kickoff Meeting
- Impact Product Tour

In addition, the Advanced and Total packages are entitled to the following activities:

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- Executive Kickoff/meetings
- Get Started with Instance Observer
- Get started with Developer Support

It's a proven effective onboarding experience that is available as part of the Impact deliverable for Guided, Advanced, and Total Customers. The Impact Squad works with the customer to discuss their business objectives and create a plan to achieve them.

Get Started with Impact provides standard prescriptive guidance specific to:

- Learning about Impact and its offerings
- Setting up Impact with its relevant features
- Outlining the customer's objectives and priorities
- Receiving a personalized experience and plan to achieve those objectives and priorities

Customer Impact Plan

Focuses on accelerating value realization, enhancing platform adoption, and promoting optimal performance through tailored guidance and support.

About Customer Impact Plan

The Customer Impact Plan (CIP) is the mutually agreed strategic roadmap that outlines the customer's journey to achieving their goals with ServiceNow. It's part of the Impact deliverable for Guided, Advanced, and Total Customers.

Your Customer Success Manager (CSM) actively maintains the CIP throughout the ServiceNow journey, which evolves according to the customer's unique needs.

The CIP contains information related to the following:

- Objectives and Outcomes
- Capabilities Map
- Accelerators
- Training
- Platform Health

The CIP serves as a roadmap to help customers achieve their goals, track progress, set expectations, and adapt strategies. It involves stakeholders such as executive sponsors, platform owners, architects, product owners, and service owners, alongside the CSM.

Impact Steady State

Impact Steady State is the cadence that keeps you on track with your Impact Plan and associated business goals that follows the Foundations phase, generally beyond 90–120 days of engagement.

After completing Impact Foundations, certain activities continue quarterly and monthly for ongoing maintenance and success. Impact Steady State is the cadence that keeps you on track with your Impact Plan and associated business goals.

Deliverables

Based on your Impact package, the deliverable outputs may vary:

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✓ = Common standardized feature set

= Includes unique package-specific features

Impact deliverables per package

Impact deliverable	Description	Guided	Advanced	Total
Quarterly Review Cycle	Kicks off the onboarding experience and evaluates the current state of the targeted areas for analysis for your ServiceNow Platform.	#		

Quarterly Review Cycle

Our standard initiatives are executed in consistent, timely intervals to keep you on pace and consists of the following:

- Periodic Support Review (PSR): A quarterly report of your cases, problems, changes, and real availability, including service metrics, instance performance data, and upgrade and patch information.
- Review of Outcome Insights: A progress review to assess how well success metrics align with target improvements outlined in Value management. Guidance on approaches to data collection for this review will be delivered by the Impact squad, with an overview of configuration alternatives, including Impact's Value Management applications.
- Quarterly Impact Review Executive Briefing (QIR Executive Briefing): A strategic level conversation with customer executives that focuses on the outcomes and value that Impact is delivering towards achieving your business priorities, including holistic support and value realization reviews.

Note: Some Foundations may be re-invoked upon request during the Steady State phase as an Accelerator. For more information on the operating model, reach out to your Impact Squad.

This phase includes regular checkpoints to keep your Impact plan on track. A sequence of success focus areas or services and resources are utilized to achieve the desired outcomes. Checkpoints help to maintain alignment with the Impact plan and success methodology and can continue monthly or quarterly for ongoing maintenance and success.

Activity Center

The Activity Center provides a comprehensive view of all the activities supporting your day to day journey with Impact.

Review outstanding notifications for your key Impact activities and deliverables that need your attention, such as tasks, recommendations, and communications. You can go directly to the record and take action. Sort by upcoming activities or view a report, such as a capability map or HealthScan report. Access your Value Journey snapshot, view your overview of Impact feature usage, and your learning credit balance.

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Activity Center components

Section	Use
Conversations	Scan all conversations you are included in. Start a conversation any time to ask a question or get advice from your Impact squad.
All recommendations	View recommendations from your Squad. See Activity Center All Recommendations for additional information.
Tasks	See and manage work items you are responsible for. Also create tasks and assign them to others.
Calendar	See upcoming Impact related events, such as meetings, assessments, and goals.
Activity log	See your team's latest activities and how they support your value journey. All activities, conversations, meetings and tasks are consolidated into one page for ease of access.
Files	Access Impact related documents in one place. View, edit, and upload files for you and your team.

Note: Activities available may differ between Impact subscription levels.

Activity Center Conversations

Scan all conversations you are included in. Start a conversation any time to ask a question or get advice from your Impact squad.

Conversations is customizable by either the Kanban view or a List View. Several filter options are also available:

- Subject or reference number
- Stakeholder group
- Your conversations or all conversations
- State of conversation, either open or closed

- Rearrange the order of the conversation subject the action menu for that lane
- Search by Subject or Reference Number
- Filter by All conversations or by My conversations
- View the state by Open or Closed

Create and manage conversations

Create new Impact conversations or manage existing conversations.

Before you begin
Role required: impact user or impact executive

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Create a conversation

Procedure

1. Navigate to **Impact** > **Activity Center** > **Conversations**.
2. Select **Create New** > **Conversation**.

   Note: Conversations may be initiated from all pages in Impact.

3. Fill in the form with the conversation details, including adding attachments.

Conversation actions

Action	Description
Mark as high priority	Displays as a high priority conversation for recipients and watchlist members. High priority conversations display a yellow banner with the name of the user who marked it as such.
Create a related task	Create a task for a stakeholder group or individual recipients based on the conversation. The assigned to party will have a task created in the activity center, accordingly.
Change conversation owner	Allows the owner of the conversation to be transferred from the originator of the conversation.
Change category	Changes the category for the conversation.
Edit conversation subject	Changes the subject of the conversation from the available subjects: ○ Business KPIs ○ Objectives ○ General ○ Initiatives ○ Platform health ○ Review & meetings
Edit watchlist	Updates the recipients on the conversation watchlist to receive updates.
Mark as closed	Closes the conversation. Adjust the filter on the conversations page to view closed records.
Comment	Provide a comment in the conversation.
Search for related record	You can search for other conversations or other records in Impact that have the same subject.
Upload files	Attach files to the conversation.
Add/remove from the watchlist	Manage who receives and which conversations are part of the watchlist.

4. Select **Send**.

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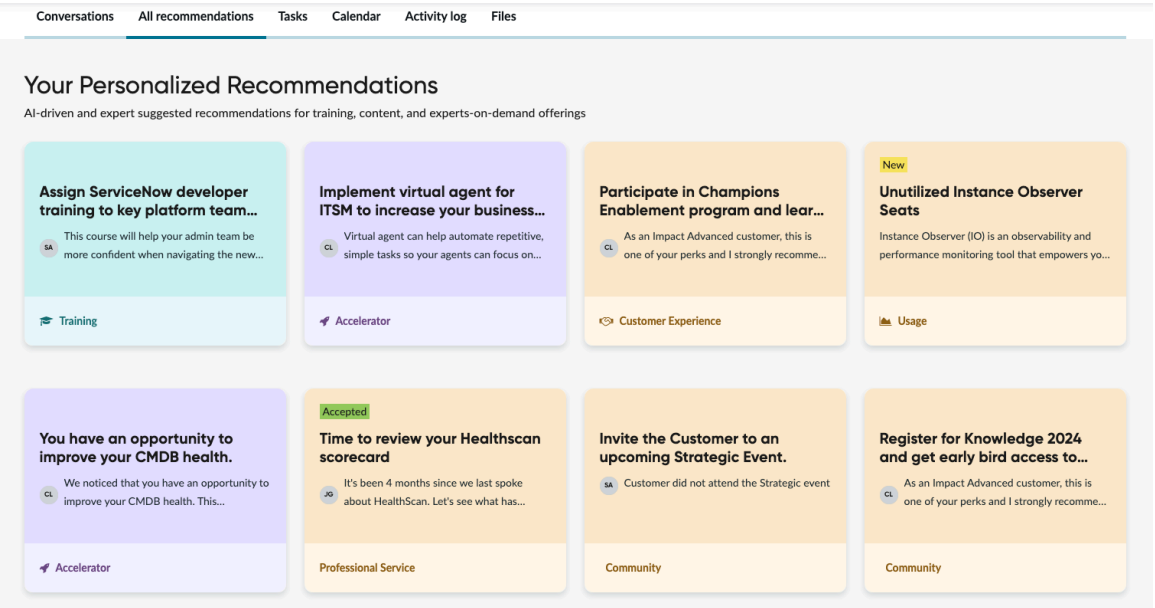
- The conversation is added to the Conversations view.
- Conversation details are captured in the conversation details.
- The Activity log is updates with the conversation details.
- The recipients and watchlist are notified of the new conversation in their Activity log in Impact.

Manage conversations

5. Select an existing conversation from the Activity Center.
6. From the Actions menu, choose an action and **Save**.
   Changes to the conversation are displayed.

Activity Center All Recommendations

View AI driven and expert suggested recommendations for training, content, and experts-on-demand offerings.



- Rule-based recommendations:
  - A framework that gives Business users a control over configuring and enriching recommendations, including the ability to define their scope.
  - Create new recommendation types using existing data within Impact at a predefined frequency as well improve the quality of existing recommendations.
- Content recommendations:
  - View Now Create content that is popular among similar users on the Impact Homepage.
  - Provide feedback on the recommended content.

Filter for specific recommendations and publish contextual recommendations or clean-up unused recommendations.

Benefits & Usage

Impact Benefits & Usage allows you to quickly access and review the powerful tools available in your Impact subscription.

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Impact benefits

The Impact program has many benefits that are included with the subscription.

Impact benefits and capabilities descriptions

Benefit	Capabilities
Impact Core	• Exploring Impact • Impact Squad • Impact operating model
Experts on Demand	• Initiatives and Accelerators • Advisory sessions • Expert services discount
Platform Health and Monitoring	• HealthScan • Overview of Instance Observer
Learning and Coaching	• Adoption Toolkit • Learning Credits • On-demand training courses • Technical certifications • Training discount
Premium Technical Support	• 24/7 Inbound Phone Support • Developer Support • Enhanced case response time

Impact Digest

Get personalized monthly updates in the form of Impact Digest.

Impact Digest is generated automatically on the second Tuesday of every month and offers a personalized Impact consumption snapshot with curated content from Customer Support Managers (CSMs) on ServiceNow products, and Impact content. With manual curation of content by a CSM Newsletter team, based on Impact Squad's opted topics and insightful consumption statistics, recognize and celebrate the Impact journey every month. Access your goals and improve platform health, product adoption, and increase value realized.

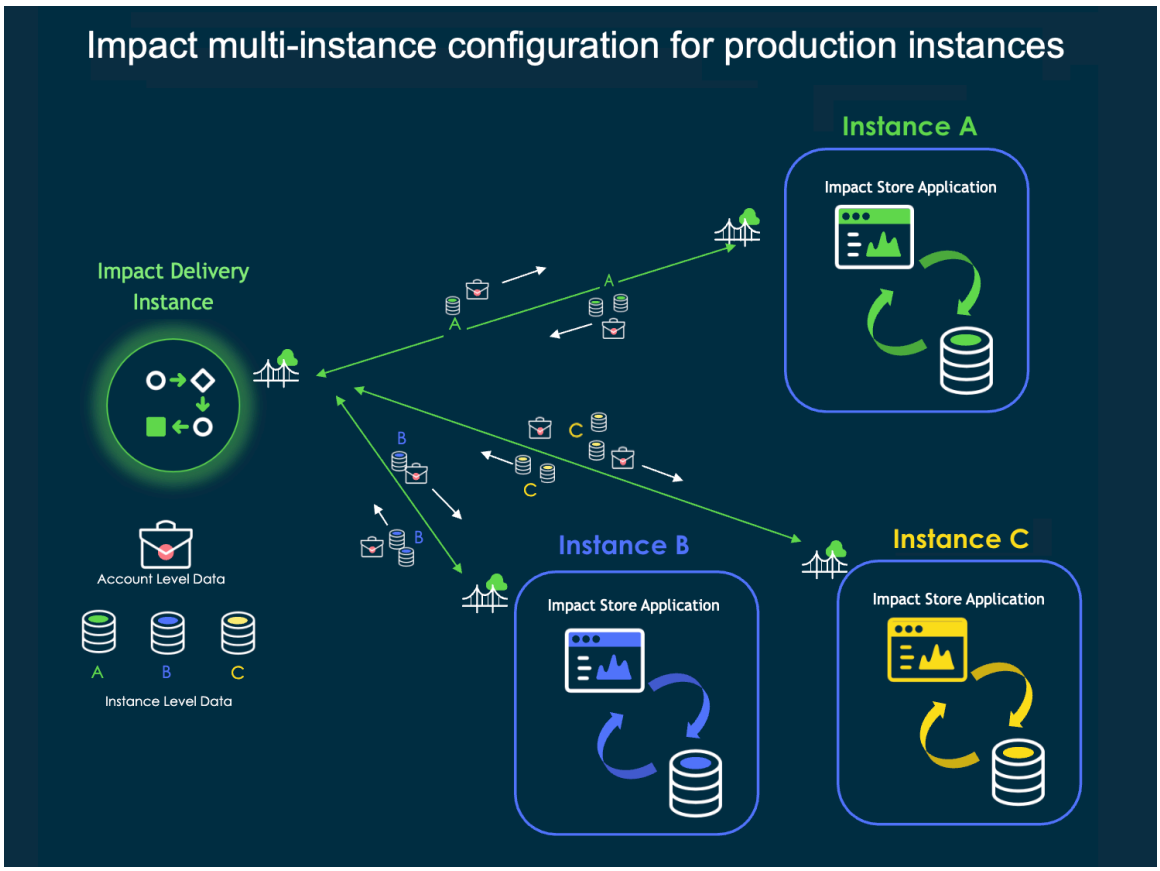
Impact multi-instance-support

Impact multi-instance support allows the Impact Delivery Instance to sync data with multiple production instances where the Impact Store Application is installed.

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There is no need to offboard initial connections to set up additional instance connections; however, configuration and connection steps must be performed for each production instance that connects to the Impact Delivery Instance.

Account level data syncs from IDI to the Impact Store App and instance level data is synced at the instance level. For example, Recommendations contain account level information and syncs for availability to all production instances. Capabilities maps contain instance level data and syncs to each individual instance. See the diagram for an example of multi-instance configuration with Impact.



For additional information about multi-instance support, see Cross-instance application trust configuration.

Mobile Executive Experience

The mobile Impact Executive Experience allows customer executives to access Impact from anywhere on their mobile browser.

Mobile Executive Experience Overview

The mobile executive experience enables CXO to:

- Quickly view their organization's performance focusing on the value they have realized from their objectives.
- Removes the detail layers provided to the platform owner persona, so that the executive does not need to spend any time hunting for the information that matters to them.

Note: This experience is only available to users with the executive role.

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Configuring Impact

Information for configuring both the Impact Delivery Instance and the Impact Store Application.

Configuration overview

1. Configure the Impact Delivery Instance
   - The Impact Delivery Instance is delivered to you with minimal technical configuration required.
   - Many of the setup steps involve planning within your organization.
2. Configure the Impact Store Application
   - The Impact Store Application can be downloaded from the ServiceNow Store.
   - Guided Setup provides a sequence of tasks that help you configure the Impact Store Application in your ServiceNow instance.

Configure the Impact Delivery Instance

The Impact Delivery Instance is delivered to you with minimal technical configuration required. Many of the setup steps involve planning within your organization and with your Impact Squad.

1. Access is enabled by your Impact squad who sends the Platform Owner a specific URL to log in to your Impact portal.
2. In order to access various levels of Impact, a role must be assigned to you. Your Impact Administrator can assign the appropriate roles to you. See Manage Impact users and Roles installed with Impact for additional information.
3. The value journey lifecycle starts with the creation of the value blueprint, which captures your business objectives, which are high-level goals tied to measurable outcomes that help illustrate value over time. Work with your Impact Squad and refer to Value management to get started.

Configure the Impact Store Application

The tasks are outlined that are required to install and then configure the Impact Store Application using Guided Setup.

Guided setup provides a sequence of tasks that help you configure the Impact Store Application in your ServiceNow instance.

The configuration and connection steps must be performed for each instance to connect to the Impact Delivery Instance for multi-instance configurations. See Impact multi-instance-support for additional configuration information.

Automated registration, the preferred method, initiates the connection and the registration to the Impact Delivery Instance provider instance into combined tasks.

Note: Regulated and GCC customers are required to perform Manual registration. See Use manual registration to configure the Impact Store Application.

Follow the individual topics for each step of the Impact Guided setup.

Install the Impact Store Application from the ServiceNow Store

Follow these instructions to install the Impact Store Application.

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Before you begin

- Versions supported: Yokohama and Xanadu Patch 2 and above
- Impact Store Application ServiceNow entitlement (sn_entitlement) version 4.1.2 or higher.

  Note: Applications that you purchase from the ServiceNow Store are added to the Application Manager automatically. Install the application from the Application Manager to activate it in an instance. Review the Impact main application listing in the ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.

- A named administrator must be allocated as the contact to perform the installation and implementation of the Impact Store Application and receive the registration email.

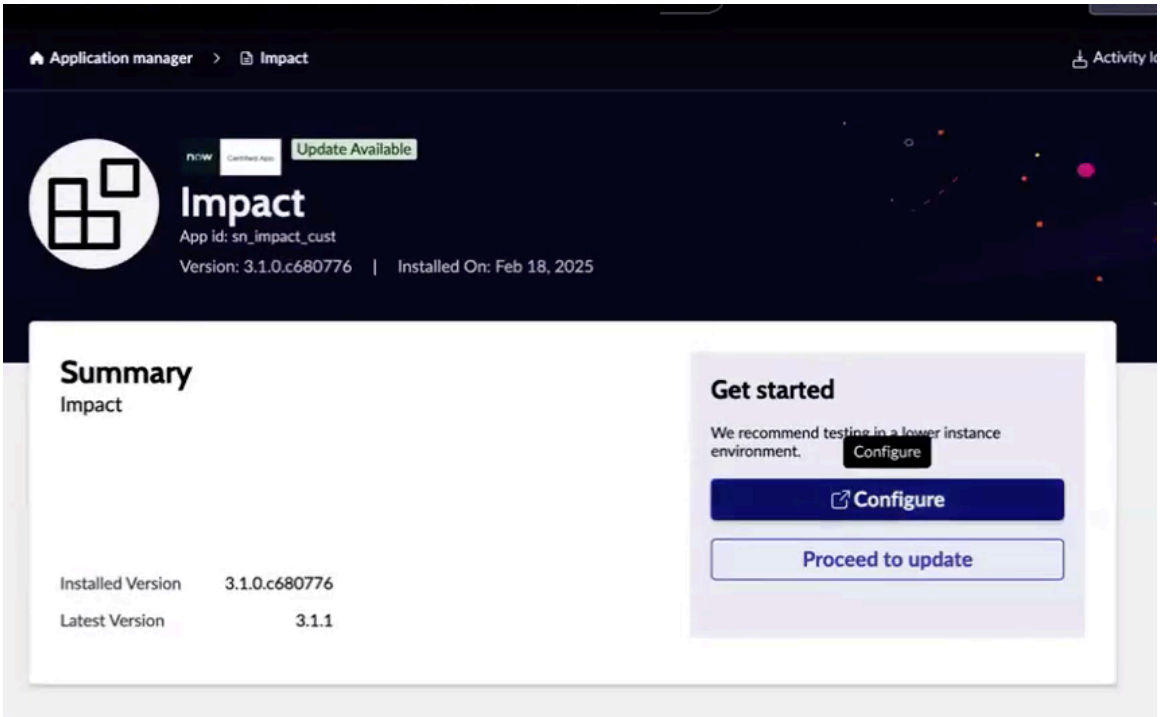
Role required: Any Impact role, admin

Procedure

1. Navigate to the ServiceNow Store.
2. Select **Apps and Solutions**.
3. Find Impact using the filter criteria and search bar.

   If you cannot find the application, contact your Impact Squad for additional assistance on procuring the Impact Store Application.
4. Select **Buy** to procure the Impact Store Application.
5. Log in to your ServiceNow® instance.
6. Navigate to **All** > **Application Manager**.
7. Search for Impact.
   You may need to refresh the sync with the ServiceNow Store with the **Sync now** option if Impact doesn't display in the list.
8. Select **Install** to complete the installation.
   Refer to Dependent applications installed with the Impact Store App for the tables installed.
9. Select **Configure**.

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You are redirected to the Impact Guided Setup.

What to do next

Use Guided Setup for Impact Store Application configuration.

Use Guided Setup for Impact Store Application configuration

Use Impact Guided Setup to follow a sequence of tasks that help you configure the Impact Store Application on your ServiceNow instance.

Before you begin

You will establish and verify your connection between the Impact Store Application and the Impact Delivery Instance IDI for data synchronization and migration.

Note: You may return to the various steps in the configuration if you don't complete the entire setup at once. As you complete each step successfully, mark the step as complete. Subsequent tasks are locked until the previous step has been completed.

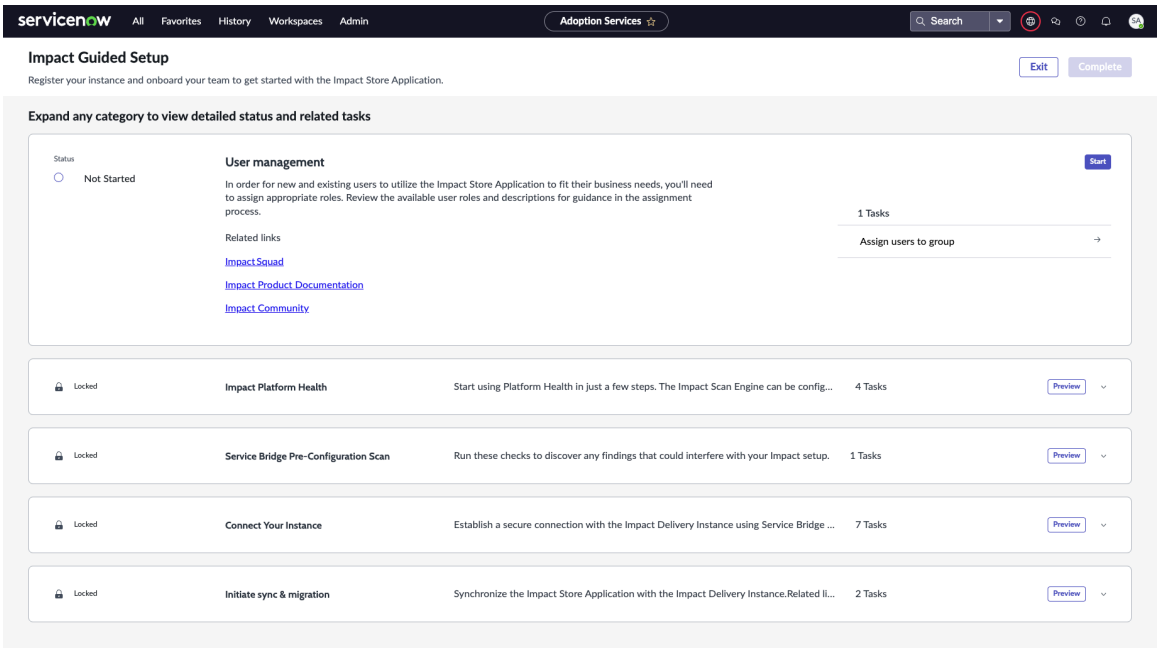
Role required: Impact admin role, admin

Procedure

1. Navigate to **All** > **Impact** > **Guided Setup**.
   The Impact Guided Setup overview page displays with additional information about the setup process and Pre-checklist information. For general information, see Guided Setup.
2. Select **Get Started**.
   The setup steps are displayed in category sections. You can expand a category to view details and related tasks.

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Important: You must mark each section as completed in order to unlock the next task section and continue setup.



What to do next

Use Guided Setup to onboard users to the Impact Store Application

Use Guided Setup to onboard users to the Impact Store Application

Onboard new and existing users to the Impact Store Application.

Before you begin

Note: You may return to the various steps in the configuration if you don't complete the entire setup at once. As you complete each step successfully, mark the step as complete. Subsequent tasks are locked until the previous step is completed.

Role required: impact admin

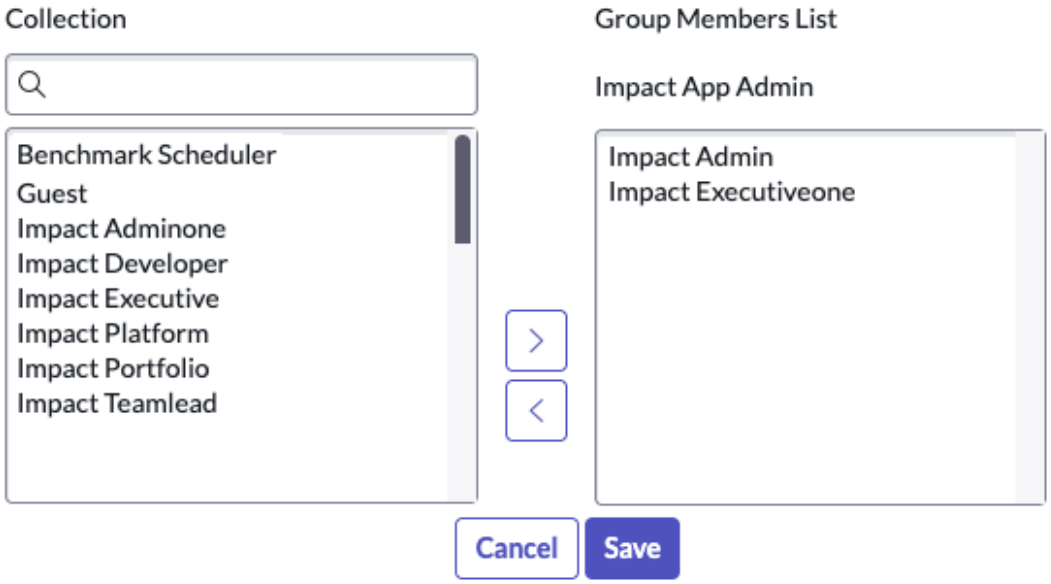
Procedure

1. Navigate to **All** > **Impact** > **Configuration** > **Guided Setup** > **User management**.
2. Select **Start**.
   The Assign users to group assignment table contains a list of available Impact group roles to assign users to. You can also create a new group.

   Note: For information on Impact groups and roles, see Manage Impact users.

3. In the Groups table, select a **[Group name]** to open the user assignment page for the selected group.
4. On the **Group Members** tab, select **Edit...**.
5. Add users to the Group Members List and select **Save**.

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You are returned to the selected Group page. The added members display as Group Members for the selected group.

6. Select the back arrow on the header of the Group page to return to the Assign users to group table.



7. Repeat the user assignment steps for each relevant group.
8. After assigning users to groups, select **Mark as complete**.
   This will complete user setup for the Impact Store App and unlock the next step in Guided Setup. If you select **Close**, you will return to Guided Setup and other steps are locked until the Impact User assignment is marked as complete.

What to do next

Assign users to Scan Engine groups

Assign users to Scan Engine groups

In addition to assigning Impact users to groups, the Platform Health users must also be part of a group.

Before you begin

Feature allocation and availability in the Platform Health Scan Engine is based on role and group assignment. See Analytics Dashboards for additional information on role-based feature availability.

Note: You may return to the various steps in the configuration if you don't complete the entire setup at once. As you complete each step successfully, mark the step as complete. Subsequent tasks are locked until the previous step is completed.

Role required: impact admin or admin

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Procedure

1. Navigate to **All** > **Impact** > **Guided Setup** > **Assign Platform Health users**.
2. Assign users to groups.
   Refer to Use Guided Setup to onboard users to the Impact Store Application for information about role assignment.
3. Create Development Teams.
   Development teams are necessary so each persona can access the relevant Platform Health dashboard. Each record indicates a team and a development team lead that Scan Engine findings will be reported on the Analytics Dashboard.

   a. Navigate to **All** > **Impact** > **Configuration** > **Scan Engine Properties**.

   b. In the Team Leads related list, select **New**.

   c. Create the relevant development teams assigned to the appropriate team lead.
   See Configure scanning properties per persona for additional information on assigning team leads to development teams.

4. Select **Mark as Complete** to enable the next configuration step.

What to do next

Activate Scan Engine and review settings

Activate Scan Engine and review settings

Use Impact Guided Setup to set up the minimum required configuration options in order to run the first system scan.

Before you begin

Assign users to Scan Engine groups before beginning this task.

Note: You can complete the configuration steps directly in the Guided Setup interface, or can configure the properties using the indicate navigation steps.

Role required: Impact admin role or admin

Procedure

1. Configure Instance Scanning and allow application access.

   a. Navigate to **All** > **Impact** > **Guided Setup** > **Impact Platform Health** > **Activate Scan Engine & review settings**.

   b. On the Scan Engine Properties form, an SE Error banner displays.



   c. Select the `sys_update_version` link to navigate to the Application Access tab.

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d. Select the **Can read** checkbox.

e. Select **Save** to continue to activate Scan Engine directly in Scan Engine properties or select **Update** to return to Guided Setup.

2. Configure Scan Engine Properties to customize and enable initial scan options.

> **Important:** The initial scan sets up the minimum required configuration options to run the first system scan.

Field	Description
Activate Scan Engine	Select the checkbox to set the value to **true**.
Run scheduled scan	○ Select the checkbox to set the value to **true**. ○ Used to schedule a daily scan to run based on the configured scan time and time zone of the settings selected.
Average Developer Rate	Default preferred developer hourly rate in the selected currency to be used for reporting the ROI (return on investment) from reducing technical issues.
Configure Scan Engine properties	Review and adjust settings, as each tab has default settings that can be adjusted. See Configure Scan Engine properties for more information.

3. Select **Mark as Complete** to enable the next step.

What to do next

Run your first scan with the Scan Engine

Run your first scan with the Scan Engine

An initial full Scan Engine completion is required to set a baseline from a series of tasks performed that tune the instance environment to complete future scans quickly and efficiently.

Before you begin

Activate Scan Engine and review settings before beginning this task.

You can complete the configuration steps directly in the Guided Setup interface or can configure the properties using the indicated navigation path.

> **Important:** Depending on the size of your instance, your first scan could take a few hours to complete. We recommend running your first scan overnight, especially in production instances.

Role required: impact admin role or admin

Procedure

1. Navigate to **All** > **Impact** > **Platform Health** > **Scheduled Scan**.
2. Select **Execute Now**.
   The scan progress is tracked within Platform Health.
3. Navigate to **All** > **Impact** > **Platform Health** > **Scan Engine** > **Scan Status**.

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See Analytics Dashboards:

- View the different charts and reports available at **ImpactPlatform HealthAnalytics Dashboard**.
- Access refreshed Health Scan engine dashboards each time a scan is completed.

The Scan Engine results display with the status of each table that is being scanned.

4. **Mark as Complete** to progress to the next step in Guided Setup.

What to do next

Configure the Impact Store Application and import data from the Impact Delivery Instance. See Run the Service Exchange pre-configuration scan for next steps.

After the Impact Store Application is configured, you can integrate with your other environments running Impact and utilize Scan Engine diagnostics. A one-time configuration, available in both Basic Auth and OAuth 2.0, is required to connect your instances. See Scan Engine integrations for details.

Run the Service Exchange pre-configuration scan

Track errors on recent transactions, see connection status, run health checks, and receive recommendations to improve the health of your Impact instance for connection with Service Exchange.

Before you begin

Role required: admin, impact admin

For more information on Service Bridge, see Secure data transfer using Service Bridge.

About this task

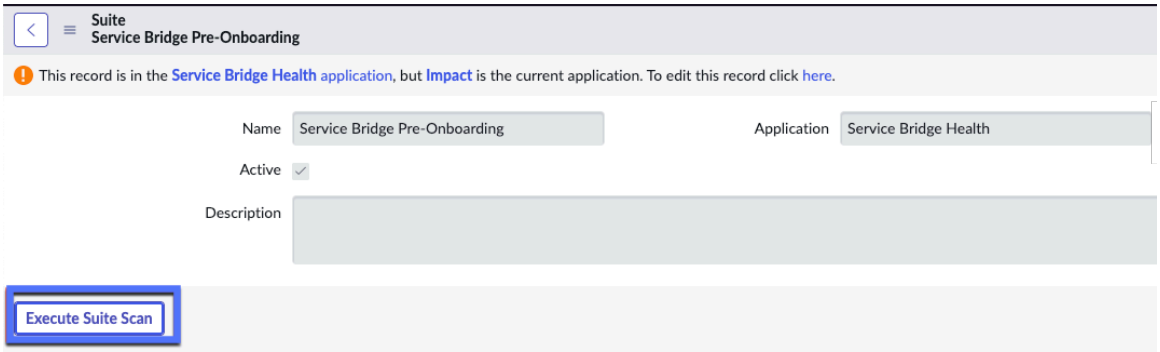
View and diagnose errors and follow the steps provided to resolve the errors. Each error record provides the following details:

- A detailed description of the error
- Reason the error has occurred
- Steps to resolve the error

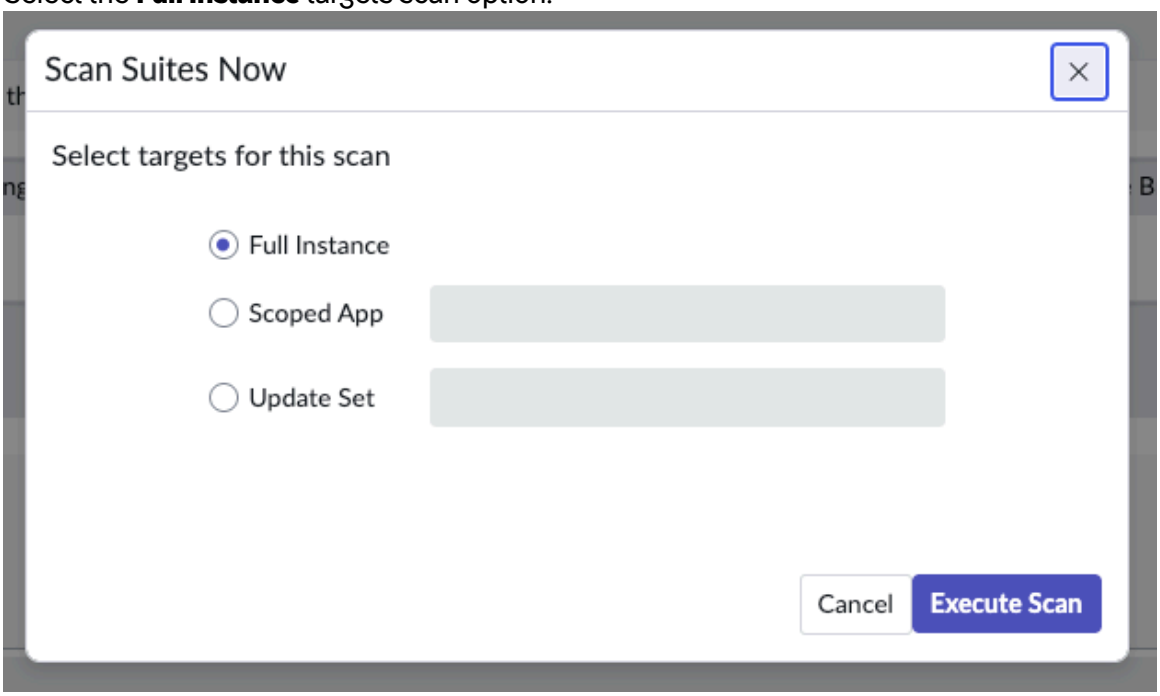
Procedure

1. Navigate to **All** > **Impact** > **Configuration** > **Guided Setup**.
   The Guided Setup overview page displays.
2. Select **Continue**.
3. In the Task section of Service Exchange Pre-configuration Scan, select **Start Service Bridge Health scan**.
4. Select **Execute Suite Scan** on the Service Bridge Pre-Onboarding page.
   You are redirected to the ServiceBridge Pre-onboarding page.

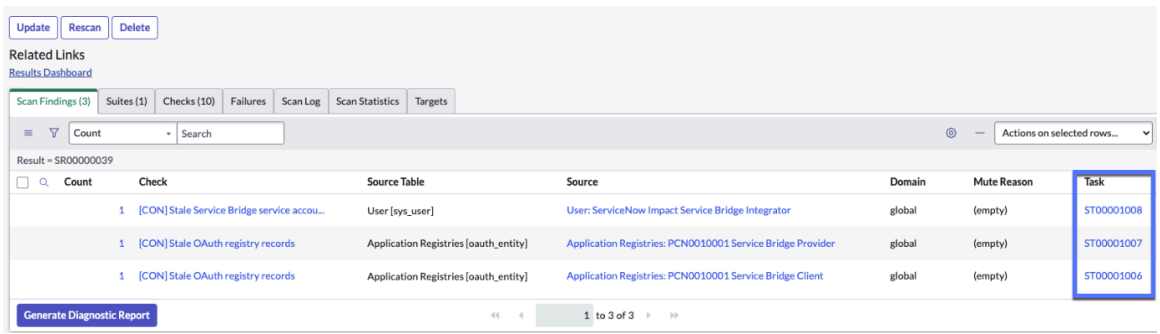
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5. Select the **Full Instance** targets scan option.



6. Select **Execute Scan**.
   A progress bar displays with the scan summary information.
7. Select **Go to Result** after 100% of the scans have completed.
8. On the Scan Findings tab, open the link in the Task column to view details of issues that were discovered.
   The **Results Dashboard** related link displays a dashboard view of the scan results.



9. Address task items in the Scan Task description and refer to Known Error Documentation in the Notes section for information to assist you with solutions to the task.

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Warning: If there are remaining issues on the Scan Findings tab, contact your Impact CSM before continuing to register your Impact Store Application.

10. Upon completion, select **Mark as complete**.
11. Close the Pre-configuration checks and return to Guided setup to continue registering your instance.

What to do next

See Use automated registration to connect to the Impact Delivery Instance to proceed with setup.

Use automated registration to connect to the Impact Delivery Instance

The automated registration process simplifies the configuration process and connects your Impact Store Application with data from the Impact Delivery Instance.

Before you begin

Run your first scan with the Scan Engine before this procedure.

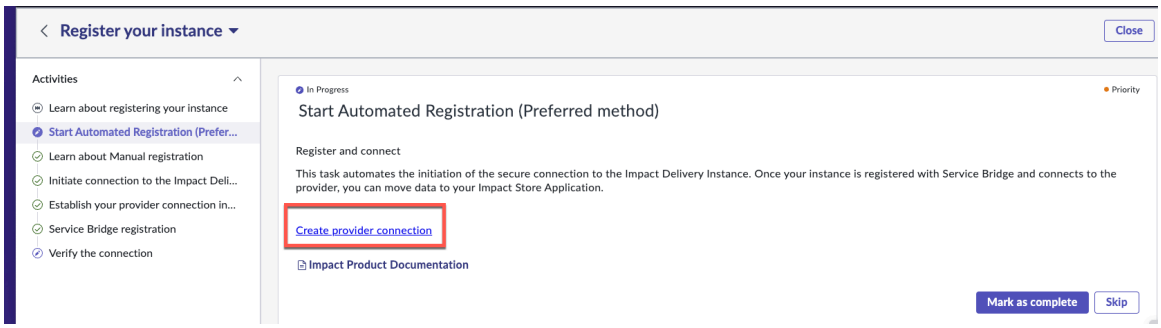
Important: Impact Store Application features that require a connection to the Impact Delivery Instance:

- Communication with your Impact Squad, including visibility into changes you make in your own Impact Workspace
- Capabilities Maps
- Accelerators
- Recommendations
- Product Adoption Roadmaps
- Value Management

Role required: impact app admin and impact admin (IDI)

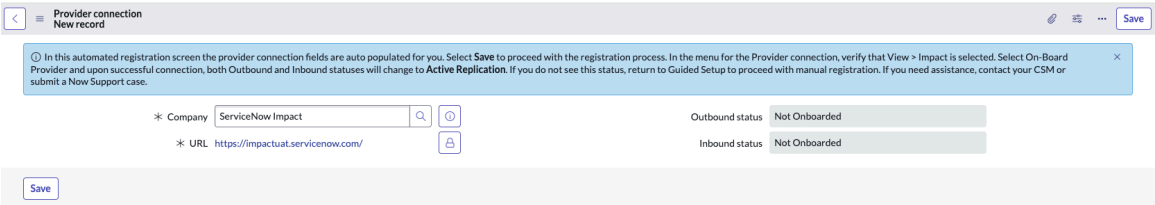
Procedure

1. Navigate to **All** > **Impact** > **Configuration** > **Guided Setup** > **Register your instance**.
2. Select **Start Automated Registration (preferred method)** to register and connect to the Impact Delivery Instance.
3. Select **Create provider connection**.



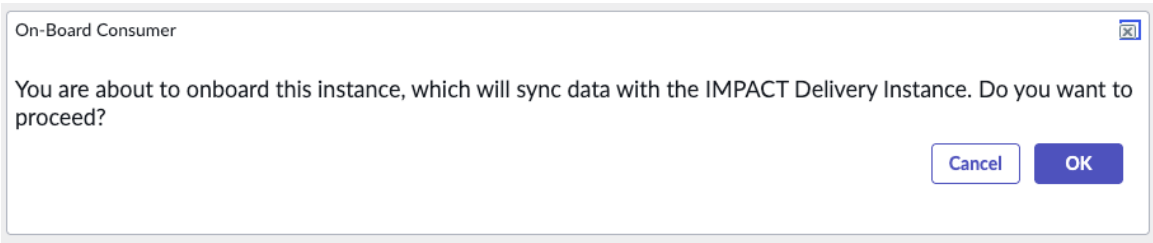
The Provider connection record is launched and the fields will be populated.

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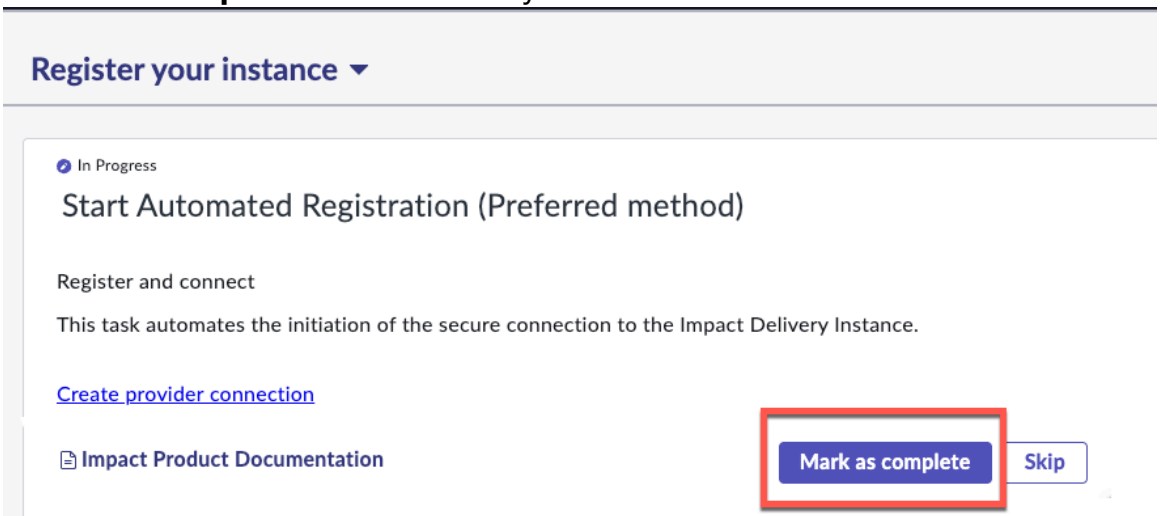


Field	Description
Company	ServiceNow Impact is pre-populated
URL	The URL to the Impact provider instance is pre-populated.
Outbound status	Not onboarded: The status will be `Not onboarded` prior to connecting to IDI.
Inbound status	Not onboarded: The status will be `Not onboarded` prior to connecting to IDI.

4. Select **Save** to continue.
   The provider record refreshes.
5. Select **Connect to Impact**.
   The on-board consumer confirmation message displays.



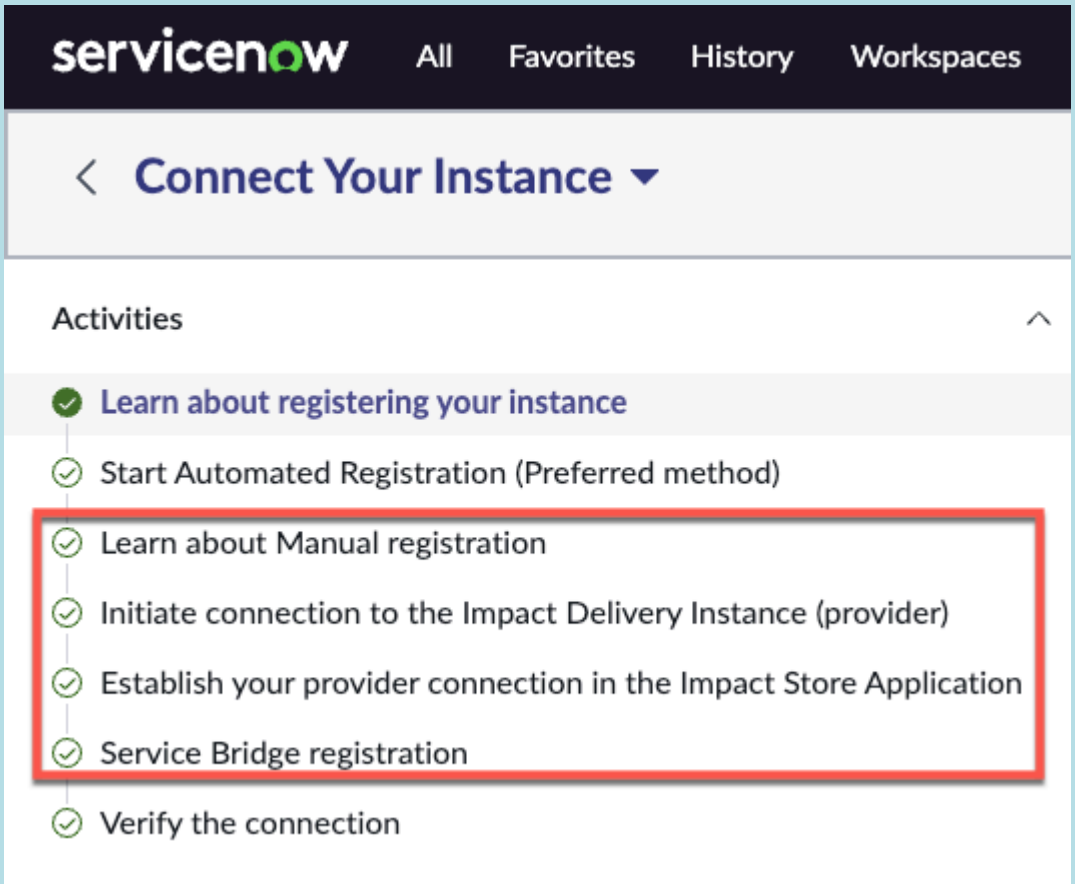
6. Select **OK** to continue.
   A progression bar displays. The on-boarding process will take a few minutes. You can close the progression window during onboarding.
7. Return to the open tab, Start automated registration a provider instance in Guided Setup, and select **Mark Complete** to continue to verify the connection.



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The **Verify the connection** activity becomes available in Guided Setup.

Important: Automated registration does not require manually completing additional connection and registration steps. See Configure the Impact Store Application for an overview of the two registration processes.



What to do next

Verify Impact data connection

Verify Impact data connection

During Impact Guided Setup automated registration, a status is provided to indicate a successful connection. Use the Verify the Connection step to track the progress.

Before you begin

Use automated registration to connect to the Impact Delivery Instance before this procedure.

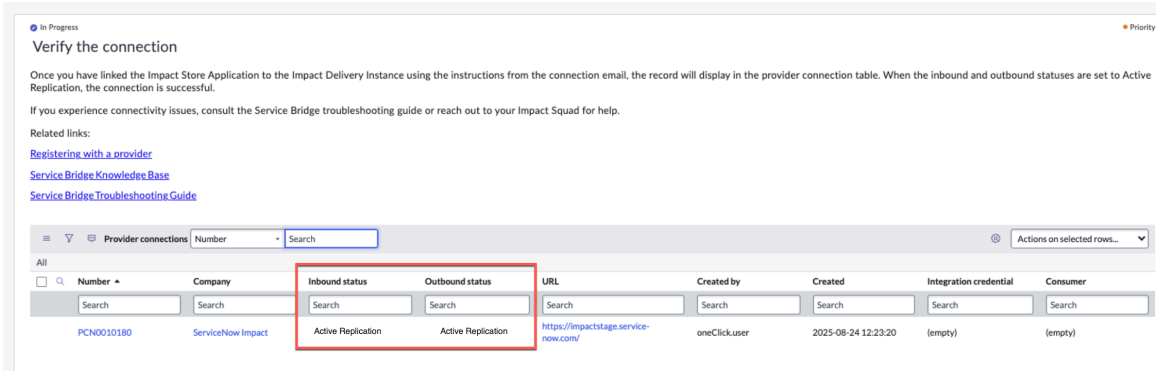
Role required: impact admin and IDI admin

Procedure

1. Navigate to **All** > **Impact** > **Configuration** > **Guided Setup** > **Verify the Connection**.
   The Verify connection table loads. Once the connection has been initiated, the status updates in the Provider connections record.

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Note:



2. Verify that the inbound and outbound statuses update to **Active Replication**.

Status	Description
Outbound status	○ Active replication: Status with successful connection and registration. ○ Not onboarded: The status before a successful connection to IDI and registration is completed.
Inbound status	○ Active replication: Status with successful connection and registration. ○ Not onboarded: The status before a successful connection to IDI and registration is completed.

Warning: If either status does not update to Active Replication, contact your Impact Customer Success Manager for further assistance. In some cases, you may be instructed to continue with the manual registration process. See Initiate the connection to the Impact Delivery Instance with manual registration for manual registration.

What to do next

Initiate data migration from IDI

Initiate data migration from IDI

After the connection is established between your Impact Store Application and the Impact Delivery Instance, next migrate your data.

Before you begin

Note: Use automated registration to connect to the Impact Delivery Instance prior to migrating data.

Role required: impact admin role, admin

Procedure

1. Navigate to **All** > **Impact** > **Configuration** > **Guided Setup** > **Initiate sync & migration**.
2. Select **Initiate migration** from the listed tasks.
3. On the Impact Data Migration overviews table, select **Start Data Migration**.

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4. Check the migration status for each table in the Impact Data Migration Overviews related list.
5. Refresh the page to repopulate the table data.
   The **Overall Migration Status** for each table will update to *Completed* when successfully transferred. Reach out to your Impact Squad if you require assistance or a table failed to migrate.
6. Select **Mark as Complete** on the Initiate Migration page when data transfer is complete.

What to do next

- Grant temporary instance access to your Impact Squad
- With successful connection and registration, see Using Impact to get started with your Impact Store Application.

Grant temporary instance access to your Impact Squad

Familiarize yourself with your ServiceNow Impact Squad, a dedicated team of experts ready to assist in tackling your team's unique transformation challenges. View or grant your Impact squad 30 day read-only access to your instance to support you with Impact features.

Before you begin

Role required: impact_platform_owner, admin

About this task

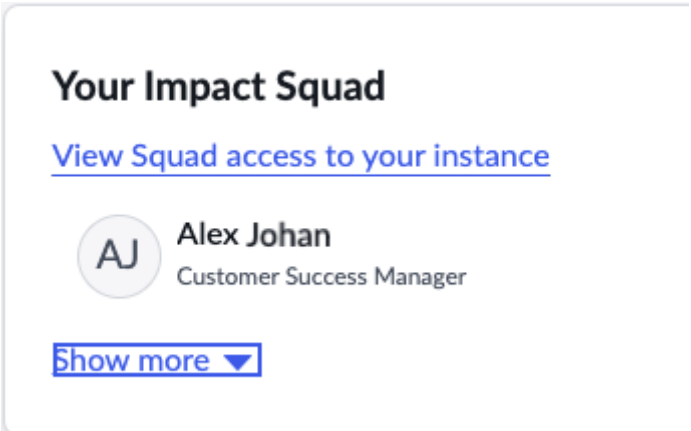
Impact squad members can easily log in and access customer instances to facilitate effective support and rapid issue resolution. During the Guided Setup onboarding process, you'll be able to provide consent on the Know your Squad and Grant SNC Access page. Select your Squad members then select **Approve** and the selected members will have read-only access to your Impact Store Application.

When approved, the selected members gain read-only access to your Impact Store Application for 30 days.

For other access requests outside of onboarding, squad members can trigger an access request, which sends an email to you where you can approve or reject the request through the Impact Store Application. Notifications are sent if Impact squad members change.

Procedure

1. Navigate to **All** > **Impact** > **Overview**.
2. In the Your Impact Squad widget, select **View Squad access to your instance**.



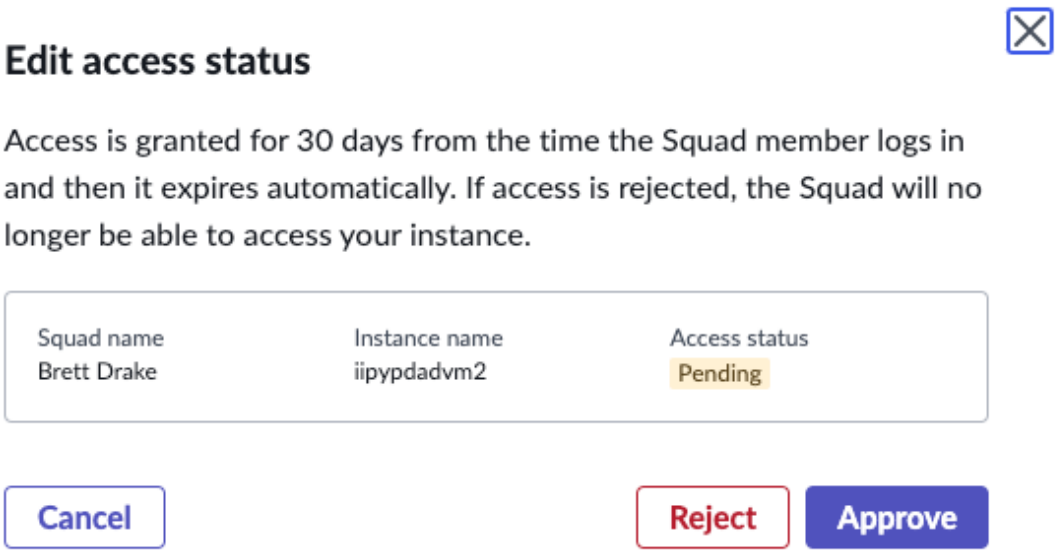
Squad access to your instance displays Impact Squad member information and access fields.

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Squad access table

Field	Description
Action	Action field is used to Approve or Remove instance access for the selected Impact Squad member. **Note:** **Edit access status** is available to select for Pending, Approved, and Rejected access statuses.
Access status	○ Pending: The Squad member has requested access. An action is to either **Approve** or **Reject** the request. ○ Approved: The Squad member has been granted 30-day access to the instance. The action is available to **Remove** access. ○ Rejected: The Squad member requested access, however, the access wasn't permitted. The action is available to **Approve** the request. ○ Not requested: The Squad member hasn't requested access to the instance. No action to be taken.
Squad name	Squad member
Squad title	Squad title
Access expires	Date access to the instance expires for the squad member.

3. Select **Edit access status**.
4. Select to **Approve**, **Reject**, or **Remove** access.



What to do next

Refer to Using Impact to get started with the Impact Store Application.

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Manage Impact users

Impact admins can create, view, and manage their users with Impact User Management.

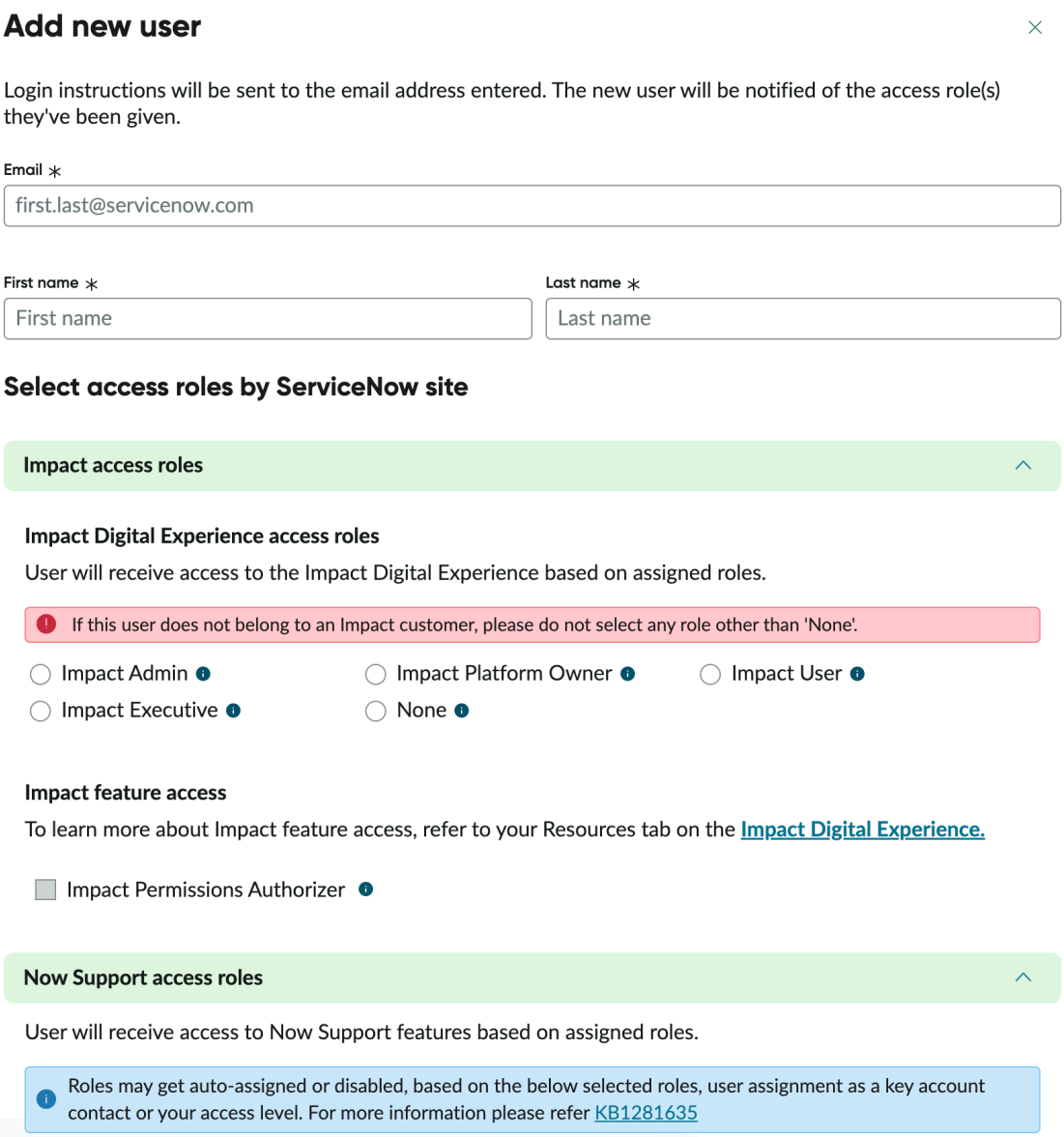
Before you begin

Note: See Roles installed with Impact for information about Impact role permissions.

Role required: Impact admin

Procedure

1. Navigate to **Impact** > **User Profile Menu** > **Manage Users**.
2. Select **Add new**



user.

3. Enter the relevant information including:
   - User email (required)
   - User First and Last names (required)
   - Impact role

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- Impact feature access
- ServiceNow University access role

4. Select **Submit**.
   The new user is created.

Edit a role for an Impact user

Update a role for an Impact user role after the initial assignment.

Before you begin

Role required: Impact admin

Procedure

1. Navigate to **Impact** > **User Profile Menu** > **Manage Users**.
2. In the ServiceNow sites section, access the Impact Digital Experience tile.
3. Select **View all users**.
4. Enter the users name into the **Search users** field.
5. Select **Actions** > **Edit role(s)**.
6. Edit the user role and access accordingly.

   Note: Refer to Roles installed with Impact for details on which role to assign to the user for the appropriate access level in Impact.

7. Select **Confirm**.
   - A confirmation message displays then you are returned to the company users page.
   - An email will be sent to the user with information on how to log in to Impact.

Remove Impact user permissions

Remove permissions that you've assigned to an Impact user if that user should no longer have access to Impact.

Before you begin

Role required: Impact admin

Procedure

1. Navigate to **Impact** > **User Profile Menu** > **Manage Users**.
2. In the ServiceNow sites section, access the Impact Digital Experience tile.
3. Select **View all users**.
4. Enter the users name into the **Search users** field.
5. Select **Actions** > **Edit role(s)**.
6. Edit the user role to **None**.

   Note: Refer to Roles installed with Impact for details on which role to assign to the user for the appropriate access level in Impact.

7. Select **Confirm**.
   A confirmation message displays then you are returned to the users page.

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Activate Now Assist skills in Now Assist for Impact

Activate a skill before you can use the generative AI capabilities for Now Assist for Impact.

Before you begin

Important: The outcome summarization Now Assist skill is now turned on by default. The skill will be automatically available to appropriate role users for the application. This change simply activates the skill and does not touch the roles that are needed to use the skill. The new default behavior works as follows:

New customers

When you install a Now Assist product, designated skills are turned on automatically.

Existing customers who are upgrading (starting with Zurich Patch 4)

Any previously unconfigured skill is turned on automatically (the skill was never turned on, then off again).

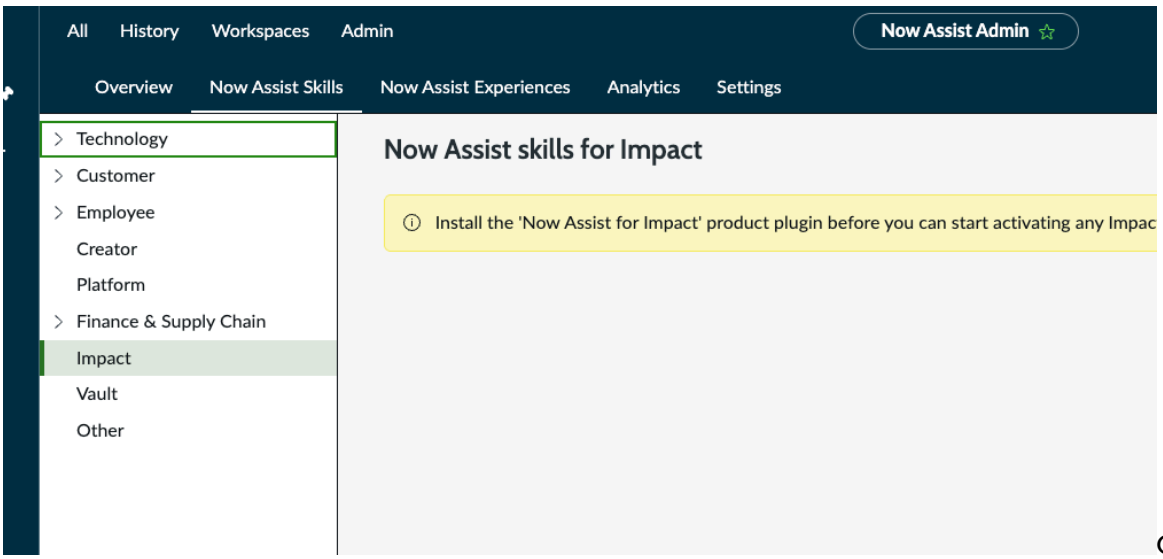
There is no change to Now Assist skills that are currently enabled and customized.

Previously configured skills that were turned on, then off, remain inactive.

Role required: Impact admin

Procedure

1. Navigate to **All** > **Admin Center** > **Now Assist Admin**.
2. On the **Now Assist Skills** tab, under the **Technology** workflow group, select **Impact**.



3. On the Now Assist skills for Impact page, activate a skill by selecting **Turn On**.
4. Review the details of the skills on each tab, configure the skills, and select **Save**.
5. Review your choices and select **Turn On**.
   Your skill is configured.

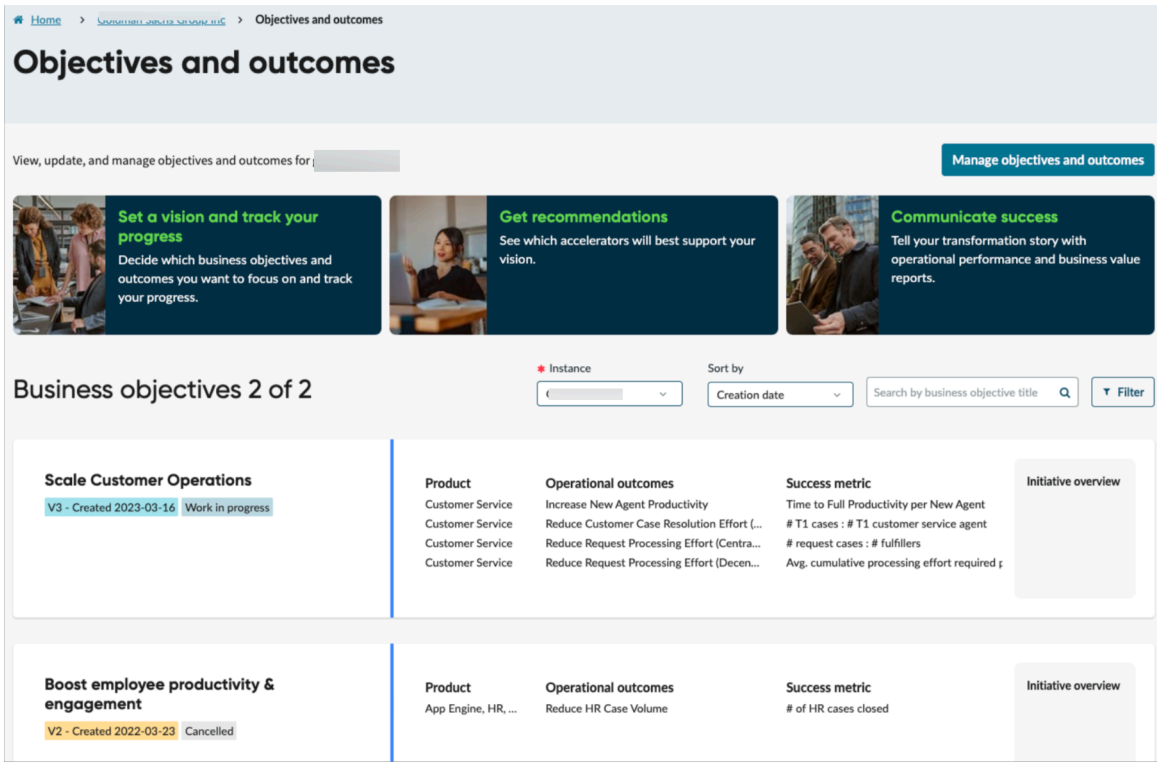
Configure Objectives and outcomes

The value management lifecycle starts with the identification of your objectives and outcomes.

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Your objectives and outcomes are the basis for creating a personalized Customer Impact plan, recommend services, content, and training.

The intent is to set a yearly improvement target against these outcomes to be able to capture the incremental improvements and value realized during the upcoming year. Your squad will help you understand where you are and what you can do to meet your objectives.

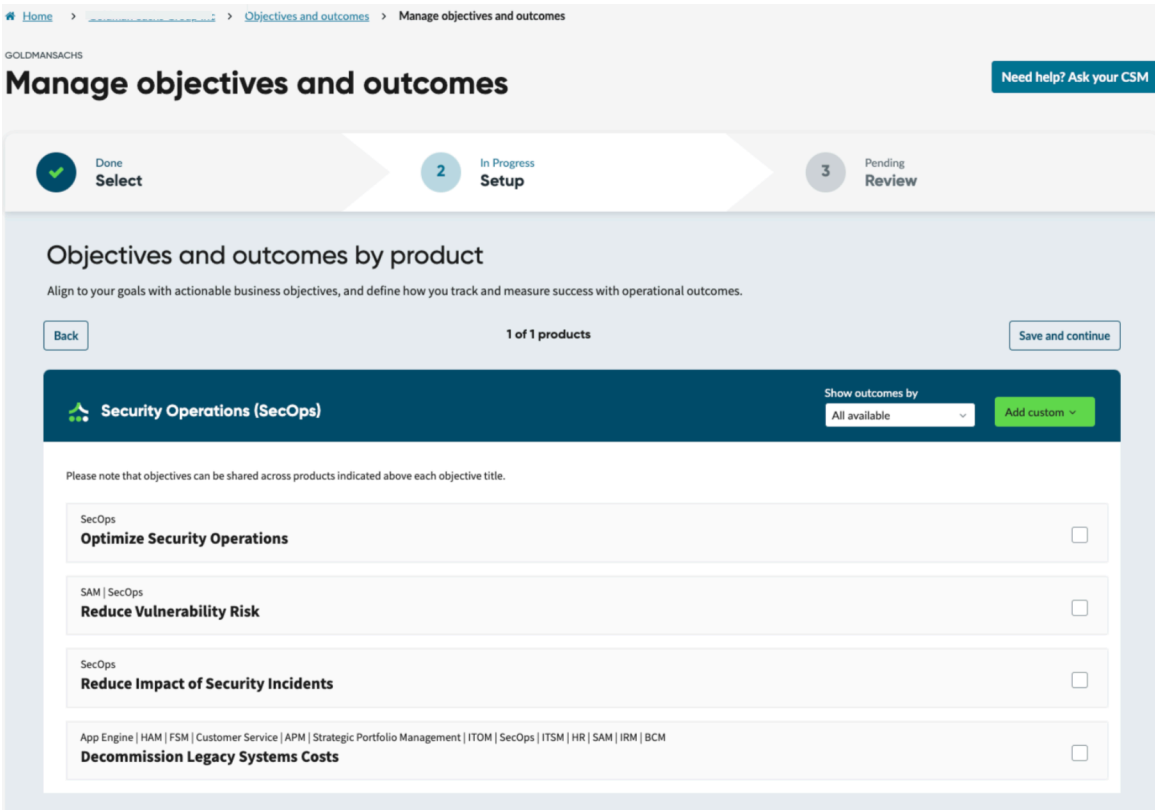


You can measure a selected objective under the same product across multiple ServiceNow instances. Use the Instance option on the Objectives and Outcomes, and Outcomes Insights to filter business objectives and outcomes by the ServiceNow instance.

Customization

Select **Manage Objectives and Outcomes** to setup and manage this feature.

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For additional information about the Objectives and outcomes for the Impact Store Application, see Value management.

Set up Impact Value Management data collection apps

The Impact Value Management Data Collection apps are designed to simplify and optimize the value metrics data collection process using Performance Analytics (PA). These applications enable you to efficiently gather, track, and analyze critical success metrics, ensuring data-driven decision-making and improved visibility into key performance trends.

The Impact Value Management data collection apps are available in the ServiceNow Impact store application. These apps are accessible directly on a user's own instance as part of the Impact package, eliminating the need for separate downloads from the store or individual content packs. By leveraging predefined data definitions within Performance Analytics (PA), customers can automatically collect essential data for value metrics. This streamlined approach enhances the accuracy and efficiency of data collection for value measurement, providing a seamless experience and improving both customer satisfaction and product evaluation in the value management within Impact.

Impact Value Management data collection apps are delivered by the Impact squad with a detailed overview of the Report configuration options and potential implementation recommendations for collecting the data required for your objectives and outcomes, outcome performance report, and value reports that are part of the Impact program.

Key benefits

- Automated data collection: Automatically gathers essential data to support Value management activities, including:
  - Setting value baselines and targets
  - Conducting outcome performance reviews
  - Generating value reports

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- Improved data accuracy: Leverages predefined Performance Analytics (PA) data definitions to ensure high-quality, reliable data.
- Seamless integration: Removes the need for manual downloads or individual content pack installations as data collection apps are embedded within the Impact package.
- Enhanced visibility: Provides real-time insights into performance trends, facilitating better decision-making and outcome tracking.
- Data Sync to Impact Provider: Syncs the data collected via Data Collection jobs bidirectionally between the ServiceNow Impact store application and the Impact delivery instance (IDI), ensuring consistent and up-to-date information.

  Service Bridge Integration is the core technology enabling data synchronization between instances. It securely and efficiently handles data payloads, allowing real-time data synchronization to ensure seamless information flow.

  For more information, see:

  - Service Exchange
  - Use manual registration to establish the connection to the provider instance

Get started

Get started with the Data Collection Content Pack for your respective product:

- Impact Value Management Data Collection for APM
- Impact Value Management Data Collection Content Pack for App Engine
- Impact Value Management Data Collection Content Pack for CSM
- Impact Value Management Data Collection Content Pack for SAM
- Impact Value Management Data Collection Content Pack for HAM
- Impact Value Management Data Collection Content Pack for ITSM
- Impact Value Management Data Collection Content Pack for ITOM
- Impact Value Management Data Collection Content Pack for HR
- Impact Value Management Data Collection Content Pack for SecOps
- Impact Value Management Data Collection Content Pack for SPM
- Impact Value Management Data Collection Content Pack for IRM

Install Impact Value Management Data Collection Content Pack Apps dependent plugins

Install the dependent plugins for Impact Value Management Data Collection Content Pack apps

Before you begin

Role required: admin

- Install the ServiceNow Impact store application in your ServiceNow instance before you enable Value Management data collection apps plugins.
- Install at least one dependency plugin to enable data collection jobs in Impact value management data collection apps. The only exception is Strategic Portfolio Management, which requires both dependency plugins to be installed to enable data collection functionality.

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Procedure

1. Navigate to **System Definitions** > **Plugins**.
2. Search for the plugins that are required for the respective content pack installation.
3. Ensure that all dependent plugins are installed before activating the Data Collection content pack jobs.
   The following dependent plugins must be installed to support the functionality of Data Collection apps:

Data Collection Content Pack	Dependent plugins
IT Operations Management (ITOM)	Event Management Core (sn_em_ai)
HR Service Delivery (HRSD)	Human Resources Scoped App: Core (com.sn_hr_core)
Strategic Portfolio Management (SPM)	○ PPM Standard (com.snc.financial_planning_pmo) ○ Goal Framework (sn_gf)
Application Portfolio Management (APM)	Enterprise Architecture (com.snc.apm)
App Engine	App Engine Studio (sn_app_eng_studio)
Customer Service (CSM)	Customer Service Management(com.sn_customerservice)
Security Operations (SecOps)	○ Security Incident Response Dependencies (Id: com.snc.si_dep) ○ Vulnerability Response Dependencies (Id: com.snc.vul_dep) ○ Security Incident Response (sn_si) ○ Vulnerability Response (sn_vul)
Hardware Asset Management (HAM)	Hardware Asset Management (sn_hamp)
Software Asset Management (SAM)	○ Major Incident Management plugin(com.snc.incident.mim) ○ SaaS License Management plugin (com.sn_sam_saas_int)
Integrated Risk Management (IRM)	○ GRC: Policy and Compliance Management (sn_compliance) ○ GRC: Advanced Risk (sn_risk_advanced) ○ ServiceNow Audit (sn_audit) ○ ServiceNow risk assessment (sn_risk_assessment)

Modifying the Data Collection configuration

You can make changes to the Data Collection configuration to align with your organization's needs.

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When the standard definitions for the Success Metrics from ServiceNow don't align with how your organization functions or how you use the platform, you can change the configuration of the data collection app to reflect your processes and implementation.

Alterations of a success metric data point definition require changes to one or both of the following pieces of the metric architecture within Performance or Performance/Platform Analytics:

- Change the Indicator Source when you need a different basic data set.
- Change the automated indicator when you need to change the filters that are applied on the basic data set for the calculation.

Example of common modifications

Some organizations do not use the recommended Outages table within the CMDB (and the Employee Center notification functionality that comes with it) to capture outages.

In this case, work with the Service Owner and your Squad to define the correct way to identify or approximate what an Outage is. For example, some customers consider Priority 1 incidents to be a representation of outages.

The alterations for this change in metric definition would imply the following configuration changes:

- A basic data set indicator source for the incident table already exists as it is leveraged by some of the other success metrics. Therefore, you don't have to create a new indicator source.
- The Automated Indicators configurations for the following need to be adjusted: Impact VM - Mean Time to Restore - Unplanned Outages (hrs) and Impact VM - # of Unplanned Outages This Month.
  - Change the Indicator Source field to **Impact VM - Incidents Closed This Month** on both indicators.
  - Change the Additional Conditions to add a filter for **Priority 1** on both indicators.
  - For Time to Restore, as the duration field may not be in use, you can use a scripted calculation for the duration. You can re-use the script from the automate indicator **Impact VM - Average Time to Close an Incident (hrs)** for this.

Upgrading the Data Collection Content Pack

When you upgrade the Data Collection Content Pack, you must account for any customizations you've made.

Since users might change artifacts within this app (for example, indicator, indicator source, or data collection job), remember that the upgrade process would be the same as the process for upgrading the platform or any other store app. The upgrade process skips customized (or changed) application files. You can view unchanged customizations in the upgrade history, and do one of the following:

- Accept the customizations.
- Revert the customizations back to the base system, and then reapply them.

Impact Value Management Data Collection for APM

Install and configure the Data Collection Content Pack for APM.

Perform the steps in the following order:

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1. Install the Data Collection Pack for APM
2. Configure Data Collection for APM
3. Activate Data Collection for APM
4. Review APM artifacts

You can also modify the configuration at any point, and maintain customizations when you are ready to upgrade. For more information, see Modifying the Data Collection configuration and Upgrading the Data Collection Content Pack.

Install the Data Collection Pack for APM

To enable the Data Collection Pack, you must install dependent plugins and activate Data Collection jobs.

Before you begin

The APM Success Metric Definitions in this application rely on another application. Ensure that the required plugins are installed if they are not already. For more information, see Install Impact Value Management Data Collection Content Pack Apps dependent plugins.

Note: If you have SPM Data Collection packs activated, navigate to the APM indicator (Impact VM - # of Applications Migrated) > indicator source (Impact VM APM - Number of Applications Migrated) and ensure that the state is set to complete.

Role required: Impact user

Procedure

1. Navigate to the Impact workspace on your instance.
2. Navigate to **All > Impact >Configuration >Value PA Data Collection Jobs** > **.**
3. Select **Value PA Data Collection jobs**.
4. Search for and select the following:
   - **Impact VM - APM - Monthly Data Collection**
   - **Impact VM - APM - Historical Data Collection**

   If you're having trouble finding the data collection jobs, check whether the required data collection-dependent plugins are installed correctly. See Install Impact Value Management Data Collection Content Pack Apps dependent plugins.

Configure Data Collection for APM

Configure Data Collection for APM.

Before you begin

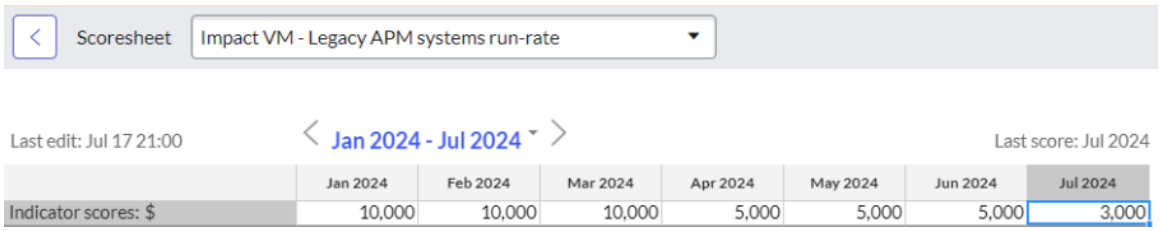
You must update Manual Indicators periodically (monthly, for example) using the scoresheet function.

Role required: admin, pa_power_user, pa_admin, or pa_data_collector

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Procedure

1. Navigate to **Performance/Platform Analytics > Scoresheet**, and then select **Impact VM - Legacy APM systems run-rate**.
2. Enter the data point in the relevant month cell.



Activate Data Collection for APM

Activate the Data Collection Pack for APM after you enable and configure it.

Before you begin

Monthly Data collection within Performance/Platform Analytics runs on a schedule.

Important: To get data collection up and running, perform the monthly setup only once.

Role required: admin, pa_admin, or pa_data_collector

Procedure

1. Navigate to **Performance/Platform Analytics > Data Collector> Jobs**, and then open **Impact VM – APM - Monthly Data Collection**.
2. Select **Active**, and then update the record.

Important: For monthly job execution, you should not make changes to the Day (of the month) and the Time (of the day) of the job. Time of the day is determined based on the system time zone. You should keep the default schedule as it works best with the current frequencies of the indicators.

3. To do a trial run of the monthly data collection, select **Execute Now**.
4. Navigate to **Performance/Platform Analytics > Dashboard**, and then open **Impact VM – APM**. There are two tabs: Monthly - APM and Quarterly - APM.
5. **Optional:** To validate the scores on the dashboard, do either of the following:
   - Compare them with the numbers you get from applying the same filters conditions on the fact table.
   - Refer to data collection guide to build the appropriate metric using a ServiceNow report.
6. **Optional:** To run historical jobs, do the following:

   a. Navigate to **Performance/Platform Analytics > Data Collector> Jobs**, and then open **Impact VM – APM – Historical Data Collection**.

   Important: Do NOT select Active as Historical Data collection within Performance/ Platform Analytics runs on an on-demand basis.

   For historical job execution, adjust the Relative start months according to the available data.

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- If you do not have a full version of Performance Analytics, historical data won't be captured beyond 180 days from the job execution date.
- If you have the full version of Performance Analytics, you can change the Relative start date to a longer timeframe than 6 months. For example, you could change Relative start from 6 months ago to 12 months ago.

b. Select **Execute Now** to run the historical data collection job.

c. Navigate to **Platform Analytics > Dashboard**, and then open **Impact VM – APM**.

Review APM artifacts

The data collection app contains a pre-build data metric structure for the ServiceNow Performance/Platform Analytics application.

Performance/Platform Analytics artifact types

Artifact type	Description
Indicator Source	Captures the basic data sets and commits them to the working memory of the platform to provide the foundation for the calculations. This is also called a data cube.
Automated Indicator	Basic calculation definition on the indicator source data set, potentially with additional filter conditions that you apply before making the calculation.
Manual Indicator	Metric for which there is no data set within the platform. Requires you to manually add a data point.
Formula Indicator	A more comprehensive calculation, such as % and ratio calculations that require multiple automated indicator data points for the calculation.
Data Collection Jobs	One data collection job that you can schedule to run every month, and another data collector for historical collection that you can run on demand.
Widgets	Configuration for the UI visualization of an indicator.
Dashboard	Display of a collection of widgets on a pane. This dashboard contains two tabs. One tab contains widgets showing quarterly values, and the other contains widgets showing monthly values.

Artifacts by type

The app contains the following artifacts for each of the above-specified artifact types.

Artifacts by type

Artifact type	Name
Data Collection Job	Impact VM – APM - Monthly Data Collection
Data Collection Job	Impact VM – APM - Historical Data Collection
Dashboard	Impact VM - APM

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Artifacts by type (continued)

Artifact type	Name
Widget	% of Business Capability Model with a Major Gap
Widget	Avg. application data certification %
Widget	# of application retired
Widget	Legacy APM systems annual run-rate
Widget	% of applications with indicator score
Widget	# of application migrated
Formula	Impact VM - % of Business Capability Model with a Major Gap
Automated	Impact VM - # of Business Capabilities Linked to a Business Application
Automated	Impact VM - # of Business Capabilities
Manual	Impact VM - Avg. application data certification %
Automated	Impact VM - # of applications retired
Manual	Impact VM - Legacy APM systems annual run-rate
Manual	Impact VM - % of applications with indicator score
Automated	Impact VM - # of applications migrated

Impact Value Management Data Collection Content Pack for App Engine

Install and configure the Data Collection Content Pack for App Engine.

Perform the steps in the following order:

1. Install the Data Collection Content Pack for App Eng
2. Configure Data Collection for App Engine
3. Activate Data Collection for App Engine
4. Review App Engine artifacts

You can also modify the configuration at any point, and maintain customizations when you are ready to upgrade. For more information, see Modifying the Data Collection configuration and Upgrading the Data Collection Content Pack.

Install the Data Collection Content Pack for App Eng

To enable the Data Collection Pack, you must install dependent plugins and activate Data Collection jobs.

Before you begin

The App Engine Success Metric Definitions in this application are dependent on the use of the App Engine Studio (sn_app_eng_studio) application. Ensure that the required plugins are installed if they are not already installed. For more information, see Install Impact Value Management Data Collection Content Pack Apps dependent plugins.

Role required: Impact user

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Procedure

1. Navigate to the Impact workspace on your instance.
2. Navigate to **All** > **Impact** > **Configuration** > **Value PA Data Collection Jobs**.
3. Select **Value PA Data Collection Jobs**.
4. Search for and select the following:
   - **Impact VM - App Engine - Monthly Data Collection**
   - **Impact VM - App Engine - Historical Data Collection**
5. If you're having trouble finding the data collection jobs, check whether the required data collection-dependent plugins are installed correctly.
   See Install Impact Value Management Data Collection Content Pack Apps dependent plugins.

Configure Data Collection for App Engine

Configure Data Collection for App Engine.

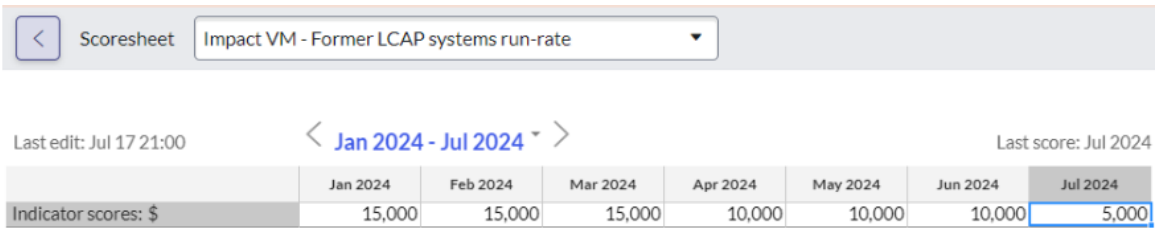
Before you begin

You must update Manual Indicators periodically (monthly, for example) using the scoresheet function.

Role required: admin, pa_power_user, pa_admin, or pa_data_collector

Procedure

1. Navigate to **Performance/Platform Analytics > Scoresheet**, and then select **Impact VM - Former LCAP systems run-rate**.
2. Enter the data point in the relevant month cell.



Activate Data Collection for App Engine

Activate the Data Collection Pack for App Eng after you enable and configure it.

Before you begin

Monthly Data collection within Performance/Platform Analytics runs on a schedule.

Important: To get data collection up and running, perform the monthly setup only once.

Role required: admin, pa_admin, or pa_data_collector

Procedure

1. Navigate to **Performance/Platform Analytics > Data Collector> Jobs**, and then open **Impact VM – App Engine - Monthly Data Collection**.
2. Select **Active**, and then update the record.

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Important: For monthly job execution, you should not make changes to the Day (of the month) and the Time (of the day) of the job. Time of the day is determined based on the system time zone. You should keep the default schedule as it works best with the current frequencies of the indicators.

3. To do a trial run of the monthly data collection, select **Execute Now**.
4. Navigate to **Performance/Platform Analytics > Dashboard**, and then open **Impact VM – App Engine**.
   There are two tabs: Monthly – App Engine and Quarterly – App Engine.
5. **Optional:** To validate the scores on the dashboard, do either of the following:
   - Compare them with the numbers you get from applying the same filters conditions on the fact table.
   - Refer to data collection guide to build the appropriate metric using a ServiceNow report.
6. **Optional:** To run historical jobs, do the following:

   a. Navigate to **Performance/Platform Analytics > Data Collector> Jobs**, and then open **Impact VM – App Engine – Historical Data Collection**.

   Important: Do NOT select Active as Historical Data collection within Performance/Platform Analytics runs on an on-demand basis.

   For historical job execution, adjust the Relative start months according to the available data.

   - If you do not have a full version of Performance/Platform Analytics, historical data won't be captured beyond 180 days from the job execution date.
   - If you have the full version of Performance/Platform Analytics, you can change the Relative start date to a longer timeframe than 6 months. For example, you could change Relative start from 6 months ago to 12 months ago.

   b. Select **Execute Now** to run the historical data collection job.

   c. Navigate to **Performance/Platform Analytics > Dashboard**, and then open **Impact VM – App Engine**.
   There are two tabs: Monthly - App Engine and Quarterly - App Engine. To validate historical data for any specific indicator, select the widget on the dashboard.

Review App Engine artifacts

The Data Collection app contains a pre-build data metric structure for the ServiceNow Performance/Platform Analytics application.

Performance/Platform Analytics artifact types

Artifact type	Description
Indicator Source	Captures the basic data sets and commits them to the working memory of the platform to provide the foundation for the calculations. This is also called a data cube.
Automated Indicator	Basic calculation definition on the indicator source data set, potentially with additional filter conditions that you apply before making the calculation.

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Performance/Platform Analytics artifact types (continued)

Artifact type	Description
Manual Indicator	Metric for which there is no data set within the platform. Requires you to manually add a data point.
Formula Indicator	A more comprehensive calculation, such as % and ratio calculations that require multiple automated indicator data points for the calculation.
Data Collection Jobs	One data collection job that you can schedule to run every month, and another data collector for historical collection that you can run on demand.
Widgets	Configuration for the UI visualization of an indicator.
Dashboard	Display of a collection of widgets on a pane. This dashboard contains two tabs. One tab contains widgets showing quarterly values, and the other contains widgets showing monthly values.

Artifacts by type

The app contains the following artifacts for each of the above-specified artifact types.

Artifacts by type

Artifact type	Name
Data Collection Job	Impact VM – App Engine - Monthly Data Collection
Data Collection Job	Impact VM – App Engine - Historical Data Collection
Dashboard	Impact VM - App Engine
Widget	# of applications built by core development team (IT), using LCAP
Widget	# of applications (and/or services) built outside of core development team
Widget	Avg. time for application delivery (IT): idea to prod (weeks)
Widget	Avg. time for application delivery (LOB): idea to prod (weeks)
Widget	Former LCAP systems annual run-rate
Automated	Impact VM - # of applications built by core development team (IT), using LCAP
Automated	Impact VM - # of applications (and/or services) built outside of core development team
Manual	Impact VM - Avg. time for application delivery (IT): idea to prod (Weeks)
Manual	Impact VM - Avg. time for application delivery (LOB): idea to prod (Weeks)
Manual	Impact VM - Former LCAP systems run-rate

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Impact Value Management Data Collection Content Pack for CSM

Install and configure the Data Collection Content Pack for CSM.

Important: You should test system configuration changes in a sub-production environment before you deploy them into production.

Perform the steps in the following order:

1. Install the Data Collection Pack for CSM
2. Configure Data Collection for CSM
3. Activate Data Collection for CSM
4. Review CSM artifacts

You can also modify the configuration at any point, and maintain customizations when you are ready to upgrade. For more information, see Modifying the Data Collection configuration and Upgrading the Data Collection Content Pack.

Install the Data Collection Pack for CSM

To enable the Data Collection Pack, you must install dependent plugins and activate Data Collection jobs.

Before you begin

The CSM Success Metric Definitions in this application rely on another application.Ensure that the required plugins are installed if they are not already installed. For more information, see Install Impact Value Management Data Collection Content Pack Apps dependent plugins.

Role required: Impact user

Procedure

1. Navigate to the Impact workspace on your instance.
2. Navigate to **All** > **Impact** > **Configuration** > **Value PA Data Collection Jobs**.
3. Select **Value PA Data Collection jobs**.
4. Search for and select the following:
   - **Impact VM - CSM - Monthly Data Collection**
   - **Impact VM - CSM - Historical Data Collection**
5. If you're having trouble finding the data collection jobs, check whether the required data collection-dependent plugins are installed correctly.
   See Install Impact Value Management Data Collection Content Pack Apps dependent plugins.

Configure Data Collection for CSM

Configure Data Collection for CSM.

Before you begin

Note: To get the data collection up and running, this setup must be done only once.

You need to determine which of your assignment groups are leveraged within the Incident, Change, and Request workflows you consider to be Tier 1 and Tier 2:

- Tier 1: First-line support, most commonly your helpdesk/service desk group(s)
- Tier 2+: Second- and third-line support, these are your specialist teams as well as potential vendor teams

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Role required: admin, pa_power_user, pa_admin, or pa_data_collector

Procedure

1. Navigate to the **Groups** module in User Administration.
2. Open the group records to use in the Incident process as the Assignment Group.
3. Add one of the following types to the record:
   - Tier 1
   - Tier 2+

   The type might not show up by default on the group form. Request a system administrator to make the field visible on the form.
4. Update the record.
5. Repeat these steps for all assignment groups.



6. To validate, run a query against the incident table for assignment groups that are still unclassified to validate you have classified all groups.



   If your assignment groups change, you will have to reclassify them.
7. For issues where the Assignment Group field isn't showing Tier 1 or Tier 2 groups in incidents, changes, or requests, ensure that the ITIL type is also added to the group:

   a. Navigate to **System Security > Users and Groups > Groups**.

   b. In the Type field, add `itil`.

   c. Save and update the form.

   d. Refresh the incident, change, or request form and recheck the Assignment Group.
   The group should now appear.

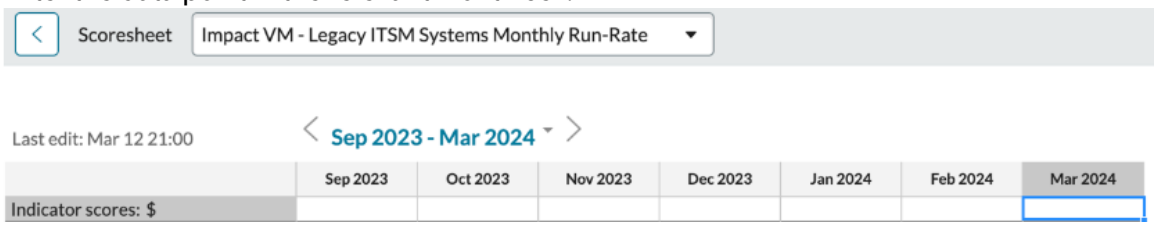
8. For the Manual Indicators, add a new data point every month.
   As an example, given the fixed nature of the Impact VM - Legacy CSM Systems Annual Run-Rate indicator, you only need to enter this data point once.

> **Important:** If you do not have full access to Performance/Platform Analytics through a Pro or Enterprise subscription, you are required to enter this data point every month

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a. Navigate to **Performance/Platform Analytics > Scoresheet** and select **Impact VM - Legacy CSM Systems Annual Run-Rate**.

b. Enter the data point in the relevant month cell.



Activate Data Collection for CSM

Activate the Data Collection Pack for CSM after you enable and configure it.

Before you begin

Monthly Data collection within Performance/Performance Analytics runs on a schedule.

Important: To get data collection up and running, perform the monthly setup only once.

Role required: admin, pa_admin, pa_data_collector

Procedure

1. Navigate to **Performance/PlatformAnalytics > Data Collector> Jobs**, and then open **Impact VM – CSM - Monthly Data Collection**.
2. Select **Active**, and then update the record.

   Important: For monthly job execution, you should not make changes to the Day (of the month) and the Time (of the day) of the job. Time of the day is determined based on the system time zone. You should keep the default schedule as it works best with the current frequencies of the indicators.

3. To do a trial run of the monthly data collection, select **Execute Now**.
4. Navigate to **Performance/Platform Analytics > Dashboard**, and then open **Impact VM – CSM**. There are two tabs: Monthly – CSM and Quarterly – CSM.
5. **Optional:** To validate the scores on the dashboard, do either of the following:
   - Compare them with the numbers you get from applying the same filters conditions on the fact table.
   - Refer to data collection guide to build the appropriate metric using a ServiceNow report.
6. **Optional:** To run historical jobs (on-demand), do the following:

   a. Navigate to **Performance/Platform Analytics > Data Collector> Jobs**, and then open **Impact VM – CSM – Historical Data Collection**.

   Important: Do NOT select Active as Historical Data collection within Performance/ Platform Analytics runs on an on-demand basis.

   For historical job execution, adjust the Relative start months according to the available data.

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- If you do not have a full version of Performance/Platform Analytics, historical data won't be captured beyond 180 days from the job execution date.
- If you have the full version of Performance/Platform Analytics, you can change the Relative start date to a longer timeframe than 6 months. For example, you could change Relative start from 6 months ago to 12 months ago.

b. Select **Execute Now** to run the historical data collection job.

c. Navigate to **Platform Analytics > Dashboard**, and then open **Impact VM – CSM**. There are two tabs: Monthly - CSM and Quarterly - CSM.

d. To validate historical data for any specific indicator, select the widget on the dashboard.

Review CSM artifacts

The Data Collection app contains a pre-build data metric structure for the ServiceNow Performance/Platform Analytics application.

Performance/Platform analytics

The content pack comes with the following artifact types. For configuring the process, Group Type is the group classification for the User Administration - Groups.

Performance/Platform Analytics artifact types

Artifact type	Description
Indicator Source	Captures the basic data sets and commits them to the working memory of the platform to provide the foundation for the calculations. This is also called a data cube.
Automated Indicator	Basic calculation definition on the indicator source data set, potentially with additional filter conditions that you apply before making the calculation.
Manual Indicator	Metric for which there is no data set within the platform. Requires you to manually add a data point.
Formula Indicator	A more comprehensive calculation, such as % and ratio calculations that require multiple automated indicator data points for the calculation.
Data Collection Jobs	Schedule on which the automated data collection will run.
Widgets	Configuration for the UI visualization of an indicator.
Dashboard	Display of a collection of widgets on a pane. This dashboard contains two tabs. One tab contains widgets showing quarterly values, and the other contains widgets showing monthly values.

Artifacts by type

The app contains the following artifacts for each of the above-specified artifact types.

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Note: The frequencies of all applicable indicators and indicator sources have been changed to monthly from quarterly. If this is not the first time using this content pack, you should run a baseline historical job (data collection job) to capture applicable historical data. The historical data will be visualized in a future enhancement of the dashboard.

Artifacts by type

Artifact type	Name
Automated	Impact VM - # of cases not resolved within SLAs
Automated	Impact VM - # of customer cases
Formula	Impact VM - % of cases not resolved within SLAs
Automated	Impact VM - # of closed customer cases
Automated	Impact VM - # of customer cases that resulted in an upsell
Formula	Impact VM - % of customer cases that result in an upsell
Automated	Impact VM - # of survey responses
Automated	Impact VM - # of survey responses with a low overall service rating
Formula	Impact VM - % of surveyed customers that report an unfavorable support experience
Automated	Impact VM - Avg. cumulative processing effort required per request case (hrs)
Automated	Impact VM - # of T1 customer support cases closed
Automated	Impact VM - # of T1 customer support agent
Formula	Impact VM - # of T1 customer support cases closed : # of T1 customer support agent
Automated	Impact VM - # of T2+ customer support cases closed
Automated	Impact VM - # of T2+ customer support agents
Formula	Impact VM - # of T2+ customer support cases closed: # of T2+ customer support agents
Data Collection Job	Impact VM - Monthly Data Collection
Widget	% of cases not resolved within SLAs
Widget	# of interactions handled by an agent that don't have related case
Widget	# of revenue generating customer requests
Widget	# of T1 customer support cases closed
Widget	# of T1 customer support cases closed : # of T1 customer support agents
Widget	# of T2+ customer support cases closed
Widget	# of T2+ customer support cases closed: # of T2+ customer support agents
Widget	% of customer cases that result in an upsell

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Artifacts by type (continued)

Artifact type	Name
Widget	% of surveyed customers that report an unfavorable support experience
Widget	Avg. cumulative processing effort required per request case (hrs)
Dashboard	Impact VM - CSM
Group Type	Tier 1
Group Type	Tier 2+

Impact Value Management Data Collection Content Pack for SAM

Install and configure the Data Collection Content Pack for SAM.

Perform the steps in the following order:

1. Install the Data Collection Pack for SAM
2. Configure Data Collection for SAM
3. Activate Data Collection for SAM
4. Review SAM artifacts

You can also modify the configuration at any point, and maintain customizations when you are ready to upgrade. For more information, see Modifying the Data Collection configuration and Upgrading the Data Collection Content Pack.

Install the Data Collection Pack for SAM

To enable the Data Collection Pack, you must install dependent plugins and activate Data Collection jobs.

Before you begin

The SAM Success Metric Definitions in this application rely on another application. Ensure that the required plugins are installed if they are not already. For more information, see Install Impact Value Management Data Collection Content Pack Apps dependent plugins.

Role required: Impact users

Procedure

1. Navigate to the Impact workspace on your instance.
2. Navigate to **All** > **Impact** > **Configuration** > **Value PA Data Collection Jobs** > **.**
3. Select **Value PA Data Collection jobs**.
4. Search for and select the following:
   - **Impact VM - SAM - Monthly Data Collection**
   - **Impact VM - SAM - Historical Data Collection**

   If you're having trouble finding the data collection jobs, check whether the required data collection-dependent plugins are installed correctly. See Install Impact Value Management Data Collection Content Pack Apps dependent plugins.

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Configure Data Collection for SAM

Configure Data Collection for SAM.

Before you begin

You do not need to assign Group Types to configure Data Collection for SAM, but you do need to enter manual data points.

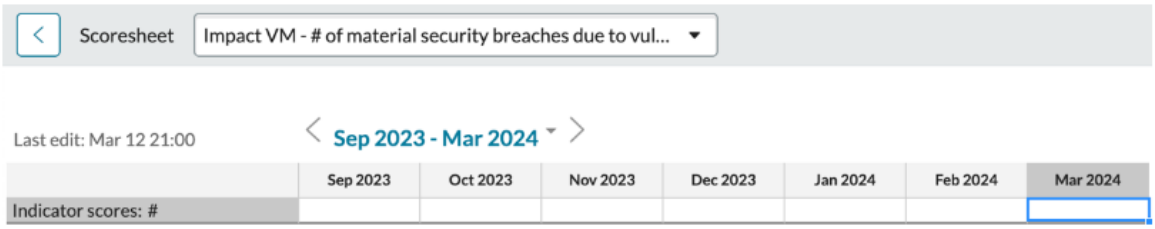
For the Manual Indicators, you must add a new data point every month. For example, given the fixed nature of the Impact VM - # of material security breaches due to vulnerable SW indicator, you only need to enter this data point once.

Important: If you do not have full access to Performance/Platform Analytics through a Pro or Enterprise subscription, you are required to enter this data point every month

Role required: admin, pa_power_user, pa_admin, or pa_data_collector

Procedure

1. Navigate to **Performance/Platform Analytics** > **Scoresheet**, and then select **Impact VM - # of material security breaches due to vulnerable SW**.
2. Enter the data point in the relevant month cell.



Activate Data Collection for SAM

Activate the Data Collection Pack for SAM after you enable and configure it.

Before you begin

Monthly Data collection within Performance/Platform Analytics runs on a schedule.

Important: To get data collection up and running, perform the monthly setup only once.

Role required: admin, pa_admin, or pa_data_collector

Procedure

1. Navigate to **Performance/PlatformAnalytics** > **Data Collector** > **Jobs**, and then open **Impact VM – SAM - Monthly Data Collection**.
2. Select **Active**, and then update the record.

   Important: For monthly job execution, you should not make changes to the Day (of the month) and the Time (of the day) of the job. Time of the day is determined based on the system time zone. You should keep the default schedule as it works best with the current frequencies of the indicators.

3. To do a trial run of the monthly data collection, select **Execute Now**.
4. Navigate to **Platform Analytics** > **Dashboard**, and then open **Impact VM – SAM**.
   There are two tabs: Monthly – SAM and Quarterly – SAM.
5. **Optional:** To validate the scores on the dashboard, do either of the following:

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- Compare them with the numbers you get from applying the same filters conditions on the fact table.
- Refer to the Data Collection guide to build the appropriate metric using a ServiceNow report.

6. **Optional:** To run historical jobs, do the following:

   a. Navigate to **Performance/Platform Analytics** > **Data Collector** > **Jobs**, and then open **Impact VM – SAM – Historical Data Collection**.

   > **Important:** Do NOT select Active as Historical Data collection within Performance/Platform Analytics runs on an on-demand basis.

   For historical job execution, adjust the Relative start months according to the available data.

   - If you do not have a full version of Performance/Platform Analytics, historical data won't be captured beyond 180 days from the job execution date.
   - If you have the full version of Performance/Platform Analytics, you can change the Relative start date to a longer timeframe than 6 months. For example, you could change Relative start from 6 months ago to 12 months ago.

   b. Select **Execute Now** to run the historical data collection job.

   c. Navigate to **Platform Analytics** > **Dashboard**, and then open **Impact VM – SAM**.
   There are two tabs: Monthly - SAM and Quarterly - SAM. To validate historical data for any specific indicator, select the widget on the dashboard.

Review SAM artifacts

The Data Collection app contains a pre-build data metric structure for the ServiceNow Performance/Platform Analytics application.

Performance/Platform analytics

The content pack comes with the following artifact types. For configuring the process, Group Type is the group classification for the User Administration - Groups.

Performance/Platform Analytics artifact types

Artifact type	Description
Indicator Source	Captures the basic data sets and commits them to the working memory of the platform to provide the foundation for the calculations. This is also called a data cube.
Automated Indicator	Basic calculation definition on the indicator source data set, potentially with additional filter conditions that you apply before making the calculation.
Manual Indicator	Metric for which there is no data set within the platform. Requires you to manually add a data point.
Formula Indicator	A more comprehensive calculation, such as % and ratio calculations that require multiple automated indicator data points for the calculation.
Data Collection Jobs	Schedule on which the automated data collection will run.
Widgets	Configuration for the UI visualization of an indicator.

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Performance/Platform Analytics artifact types (continued)

Artifact type	Description
Dashboard	Display of a collection of widgets on a pane. This dashboard contains two tabs. One tab contains widgets showing quarterly values, and the other contains widgets showing monthly values.

Artifacts by type

The app contains the following artifacts for each of the above-specified artifact types.

Note: The frequencies of all applicable indicators and indicator sources have been changed from quarterly to monthly. If this is not the first time using this content pack, you should run a baseline historical job (data collection job) to capture applicable historical data. The historical data will be visualized in a future enhancement of the dashboard.

Artifacts by type

Artifact type	Name
Formula	% new hires with all SW provisioned by day 1
Automated	Impact VM - # of New Hire catalog Item Requests Completed by 1st day
Automated	Impact VM - Total Number of New Hires
Formula	Avg. time to close a SW request (hrs)
Automated	Impact VM - Total # of completed sw requests
Automated	Impact VM - Total 'business duration' of completed sw requests
Formula	Impact VM - % of SaaS licenses unused / underutilized (per publisher)
Formula	Impact VM - unused / underutilized software licenses
Automated	Impact VM - Total # of used software licenses
Automated	Impact VM - Total # of software licenses
Formula	Impact VM - % of on-prem SW license unused / underutilized (per publisher)
Formula	Impact VM - % of SW that is centrally managed
Manual	Impact VM - Total # of software
Automated	Impact VM - # of managed software
Formula	Impact VM - # of employees : # of SAM FTEs
Automated	Impact VM - Total # of employees
Automated	Impact VM - # of SAM FTEs
Manual	Impact VM - Avg. time to respond to an audit (hrs)
Manual	Impact VM - Legacy SAM systems monthly run-rate

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Artifacts by type (continued)

Artifact type	Name
Formula	Impact VM - SW audit financial settlements as a % of SW spend
Automated	Impact VM - Current Subscription Spend
Automated	Impact VM - True-up Cost
Manual	Impact VM - # of material security breaches due to vulnerable SW
Automated	Impact VM - # of unplanned outages from SW issues
Data Collection Job	Impact VM - Monthly Data Collection
Widget	# of employees : # of SAM FTEs - monthly
Widget	# of material security breaches due to vulnerable SW - monthly
Widget	# of unplanned outages from SW issues - monthly
Widget	% new hires with all SW provisioned by day 1 - monthly
Widget	% of on-prem SW license unused / underutilized (per publisher) - monthly
Widget	% of SaaS licenses unused / underutilized (per publisher) - monthly
Widget	% of SW that is centrally managed - monthly
Widget	Avg. time to close a SW request (hrs) - monthly
Widget	Avg. time to respond to an audit (hrs) - monthly
Widget	Legacy SAM systems monthly run-rate
Widget	SW audit financial settlements as a % of SW spend - monthly
Dashboard	Impact VM - SAM

Impact Value Management Data Collection Content Pack for HAM

Install and configure the Data Collection Content Pack for HAM.

Perform the steps in the following order:

1. Install the Data Collection Pack for HAM
2. Configure Data Collection for HAM
3. Activate Data Collection for HAM
4. Review HAM artifacts

You can also modify the configuration at any point, and maintain customizations when you are ready to upgrade. For more information, see Modifying the Data Collection configuration and Upgrading the Data Collection Content Pack.

Install the Data Collection Pack for HAM

To enable the Data Collection Pack, you must install dependent plugins and activate Data Collection jobs.

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Before you begin

The HAM Success Metric Definitions in this application rely on another application. Ensure that the required plugins are installed if they are not already installed. For more information, see Install Impact Value Management Data Collection Content Pack Apps dependent plugins.

Role required: Impact users

Procedure

1. Navigate to the Impact workspace on your instance.
2. Navigate to **All** > **Impact Workspace** > **Business Value** > **PA Data Collection Jobs**.
3. Select **PA Data Collection jobs**.
4. Search for and select the following:
   - **Impact VM - HAM - Monthly Data Collection**
   - **Impact VM - HAM - Historical Data Collection**

   If you're having trouble finding the data collection jobs, check whether the required data collection-dependent plugins are installed correctly. See Install Impact Value Management Data Collection Content Pack Apps dependent plugins.

Configure Data Collection for HAM

Configure Data Collection for HAM.

Before you begin

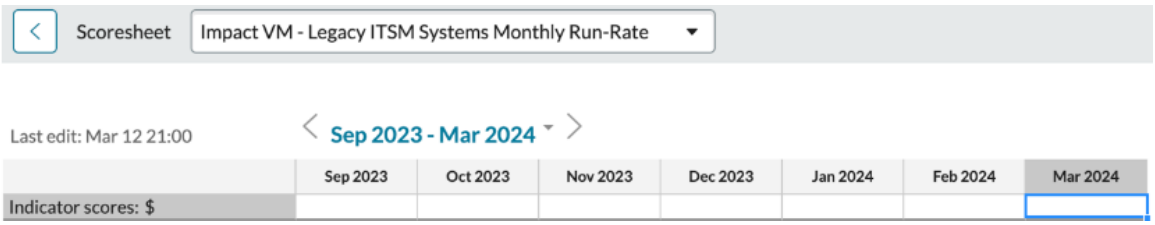
For the Manual Indicators, you must add a new data point every month. For example, given the fixed nature of the Impact VM - Legacy HAM Systems Annual Run-Rate indicator, you only need to enter this data point once.

Important: If you do not have full access to Performance/Platform Analytics through a Pro or Enterprise subscription, you are required to enter this data point every month

Role required: admin, pa_power_user, pa_admin, or pa_data_collector

Procedure

1. Navigate to **Performance/Platform Analytics** > **Scoresheet**, and then select **Legacy HAM Systems Annual Run-Rate**.
2. Enter the data point in the relevant month cell.



Activate Data Collection for HAM

Activate the Data Collection Pack for HAM after you enable and configure it.

Before you begin

Monthly Data collection within Performance/Performance Analytics runs on a schedule.

Important: To get data collection up and running, perform the monthly setup only once.

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Role required: admin, pa_admin, or pa_data_collector

Procedure

1. Navigate to **Performance/PlatformAnalytics > > Data Collector** > **Jobs**, and then open **Impact VM – HAM - Monthly Data Collection**.
2. Select **Active**, and then update the record.

> **Important:** For monthly job execution, you should not make changes to the Day (of the month) and the Time (of the day) of the job. Time of the day is determined based on the system time zone. You should keep the default schedule as it works best with the current frequencies of the indicators.

3. To do a trial run of the monthly data collection, select **Execute Now**.
4. Navigate to **Platform Analytics > Dashboard**, and then open **Impact VM – HAM**.
   There are two tabs: Monthly – HAM and Quarterly – HAM.
5. To validate the scores on the dashboard, do either of the following:
   - Compare them with the numbers you get from applying the same filters conditions on the fact table.
   - Refer to data collection guide to build the appropriate metric using a ServiceNow report.
6. **Optional:** To run historical jobs, do the following:

   a. Navigate to **Performance/Platform Analytics** > **Data Collector** > **Jobs**, and then open **Impact VM – HAM – Historical Data Collection**.

   > **Important:** Do NOT select Active as Historical Data collection within Performance/Platform Analytics runs on an on-demand basis.

   For historical job execution, adjust the Relative start months according to the available data.

   - If you do not have a full version of Performance/Platform Analytics, historical data won't be captured beyond 180 days from the job execution date.
   - If you have the full version of Performance/Platform Analytics, you can change the Relative start date to a longer timeframe than 6 months. For example, you could change Relative start from 6 months ago to 12 months ago.

   b. Select **Execute Now** to run the historical data collection job.

   c. Navigate to **Platform Analytics** > **Dashboard**, and then open **Impact VM – HAM**.
   There are two tabs: Monthly - HAM and Quarterly - HAM. To validate historical data for any specific indicator, select the widget on the dashboard.

Review HAM artifacts

The Data Collection app contains a pre-build data metric structure for the ServiceNow Performance/Platform Analytics application.

Performance/Platform analytics

The content pack comes with the following artifact types.

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Performance/Platform Analytics artifact types

Artifact type	Description
Indicator Source	Captures the basic data sets and commits them to the working memory of the platform to provide the foundation for the calculations. This is also called a data cube.
Automated Indicator	Basic calculation definition on the indicator source data set, potentially with additional filter conditions that you apply before making the calculation.
Manual Indicator	Metric for which there is no data set within the platform. Requires you to manually add a data point.
Formula Indicator	A more comprehensive calculation, such as % and ratio calculations that require multiple automated indicator data points for the calculation.
Data Collection Jobs	Schedule on which the automated data collection will run.
Widgets	Configuration for the UI visualization of an indicator.
Dashboard	Display of a collection of widgets on a pane. This dashboard contains two tabs. One tab contains widgets showing quarterly values, and the other contains widgets showing monthly values.

Artifacts by type

The app contains the following artifacts for each of the above-specified artifact types.

Artifacts by type

Artifact type	Name
Data Collection Job	Impact VM - HAM - Monthly Data Collection
Data Collection Job	Impact VM - HAM - Historical Data Collection
Dashboard	Impact VM - HAM
Widget	% new hires with all HW provisioned by day 1
Widget	Backlog as a % HW requests
Widget	% unaccounted for HW assets
Widget	% HW assets in circulation
Widget	% of leased HW assets returned late
Widget	% of HW assets that have 'end of useful life' field populated
Widget	# of Employees : # of HAM FTEs
Widget	Legacy HAM systems annual run-rate
Widget	# of unplanned outages from HW issues
Manual	Impact VM - % new hires with all HW provisioned by day 1
Formula	Impact VM - Backlog as a % HW requests
Automated	Impact VM - Number of created HW requests this month

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Artifacts by type (continued)

Artifact type	Name
Automated	Impact VM - Number of closed HW requests this month
Formula	Impact VM - % unaccounted for HW assets
Automated	Impact VM - # HW assets accounted
Automated	Impact VM - # HW assets missing
Formula	Impact VM - % HW assets in circulation
Automated	Impact VM - # HW assets
Automated	Impact VM - # HW assets in inventory
Manual	Impact VM - % of leased HW assets returned late
Manual	Impact VM - % of HW assets that have 'end of useful life' field populated
Manual	Impact VM - # of employees: # of HAM FTEs
Manual	Impact VM - Legacy HAM systems annual run-rate
Automated	Impact VM - # of unplanned outages from HW issues this month

Impact Value Management Data Collection Content Pack for ITSM

Install and configure the Data Collection Content Pack for ITSM.

Perform the steps in the following order:

1. Install the Data Collection Pack for ITSM
2. Configure Data Collection for ITSM
3. Activate Data Collection for ITSM
4. Review ITSM artifacts

You can also modify the configuration at any point, and maintain customizations when you are ready to upgrade. For more information, see Modifying the Data Collection configuration and Upgrading the Data Collection Content Pack.

Install the Data Collection Pack for ITSM

To enable the Data Collection Pack, you must activate Data Collection jobs.

Before you begin

Role required: Impact users

Procedure

1. Navigate to the Impact workspace on your instance.
2. Navigate to **All** > **Impact** > **Configuration** > **Value PA Data Collection Jobs**.
3. Select **Value PA Data Collection jobs**.
4. Search for and select the following:

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- **Impact VM - ITSM - Monthly Data Collection**
- **Impact VM - ITSM - Historical Data Collection**

Configure Data Collection for ITSM

Configure Data Collection for ITSM.

Before you begin

Note: To get the data collection up and running, this setup must be done only once.

You need to determine which of your assignment groups are leveraged within the Incident, Change, and Request workflows you consider to be Tier 1 and Tier 2:

- Tier 1: First-line support, most commonly your helpdesk/service desk group(s)
- Tier 2+: Second- and third-line support, these are your specialist teams as well as potential vendor teams

Role required: admin, pa_power_user, pa_admin, or pa_data_collector

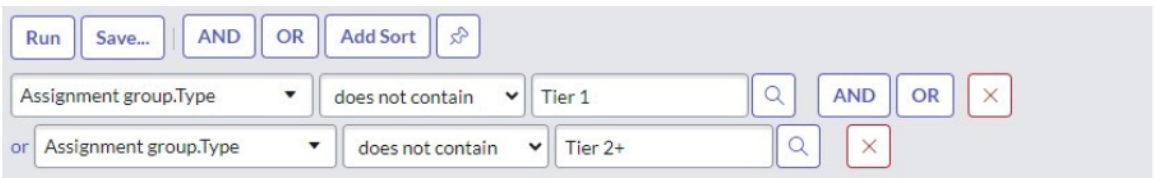
Procedure

1. Navigate to the **Groups** module in User Administration.
2. Open the group records to use in the Incident process as the Assignment Group.
3. Add one of the following types to the record:
   - Tier 1
   - Tier 2+

   The type might not show up by default on the group form. Request a system administrator to make the field visible on the form.
4. Update the record.
5. Repeat these steps for all assignment groups.



6. To validate, run a query against the incident table for assignment groups that are still unclassified to validate you have classified all groups.



If your assignment groups change, you will have to reclassify them.

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7. **Optional:** For issues where the Assignment Group field isn't showing Tier 1 or Tier 2 groups in incidents, changes, or requests, confirm that the ITIL type is also added to the group:

   a. Navigate to **System Security** > **Users and Groups** > **Groups**.

   b. In the Type field, add `itil`.

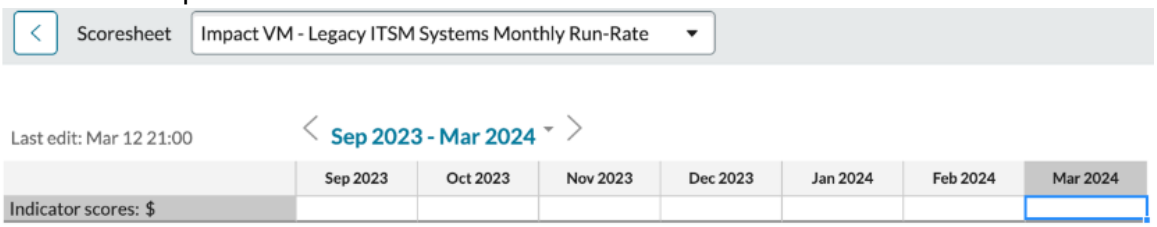
   c. Save and update the form.

   d. Refresh the incident, change, or request form and recheck the Assignment Group. The group displays under the **Groups**.

8. To add data point every month for the manual indicators do the following.

   a. Navigate to **Performance/Platform Analytics** > **Scoresheet**, and then select **Impact VM - Legacy ITSM Systems Annual Run-Rate**.

   b. Enter the data point in the relevant month cell.



   As an example, given the fixed nature of the Impact VM - Legacy ITSM Systems Annual Run-Rate indicator, you only need to enter this data point once.

   Note: If you do not have full access to Performance/Platform Analytics through a Pro or Enterprise subscription, you are required to enter this data point every month.

Activate Data Collection for ITSM

Activate the Data Collection Pack for ITSM after you enable and configure it.

Before you begin

Monthly Data collection within Performance/Performance Analytics runs on a schedule.

Important: To get data collection up and running, perform the monthly setup only once.

Role required: admin, pa_admin, or pa_data_collector

Procedure

1. Navigate to **Performance/PlatformAnalytics** > **Data Collector** > **Jobs**, and then open **Impact VM – ITSM - Monthly Data Collection**.
2. Select **Active**, and then update the record.

   Important: For monthly job execution, you should not make changes to the Day (of the month) and the Time (of the day) of the job. Time of the day is determined based on the system time zone. You should keep the default schedule as it works best with the current frequencies of the indicators.

3. To do a trial run of the monthly data collection, select **Execute Now**.

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4. Navigate to **Performance/Platform Analytics** > **Dashboard**, and then open **Impact VM – ITSM**.
   There are two tabs: Monthly – ITSM and Quarterly – ITSM.
5. **Optional:** To validate the scores on the dashboard, do either of the following:
   - Compare them with the numbers you get from applying the same filters conditions on the fact table.
   - Refer to data collection guide to build the appropriate metric using a ServiceNow report.
6. **Optional:** To run historical jobs, do the following:

   a. Navigate to **Performance/Platform Analytics > Data Collector> Jobs**, and then open **Impact VM – ITSM – Historical Data Collection**.

   > **Important:** Do NOT select Active as Historical Data collection within Performance/Platform Analytics runs on an on-demand basis.

   For historical job execution, adjust the Relative start months according to the available data.

   - If you do not have a full version of Performance/Platform Analytics, historical data won't be captured beyond 180 days from the job execution date.
   - If you have the full version of Performance/Platform Analytics, you can change the Relative start date to a longer timeframe than 6 months. For example, you could change Relative start from 6 months ago to 12 months ago.

   b. Select **Execute Now** to run the historical data collection job.

   c. Navigate to **Platform Analytics > Dashboard**, and then open **Impact VM – ITSM**.
   There are two tabs: Monthly - ITSM and Quarterly - ITSM. To validate historical data for any specific indicator, select the widget on the dashboard.

Review ITSM artifacts

The Data Collection app contains a pre-build data metric structure for the ServiceNow Performance/Platform Analytics application.

Performance/Platform analytics

The content pack comes with the following artifact types. For configuring the process, Group Type is the group classification for the User Administration - Groups.

Performance/Platform Analytics artifact types

Artifact type	Description
Indicator Source	Captures the basic data sets and commits them to the working memory of the platform to provide the foundation for the calculations. This is also called a data cube.
Automated Indicator	Basic calculation definition on the indicator source data set, potentially with additional filter conditions that you apply before making the calculation.
Manual Indicator	Metric for which there is no data set within the platform. Requires you to manually add a data point.

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Performance/Platform Analytics artifact types (continued)

Artifact type	Description
Formula Indicator	A more comprehensive calculation, such as % and ratio calculations that require multiple automated indicator data points for the calculation.
Data Collection Jobs	Schedule on which the automated data collection will run.
Widgets	Configuration for the UI visualization of an indicator.
Dashboard	Display of a collection of widgets on a pane. This dashboard contains two tabs. One tab contains widgets showing quarterly values, and the other contains widgets showing monthly values.

Artifacts by type

The app contains the following artifacts for each of the above specified types.

Artifacts by type

Artifact type	Description
Indicator Source	Impact VM - Changes Closed This Month
Indicator Source	Impact VM - Group Members
Indicator Source	Impact VM – Active Users
Indicator Source	Impact VM - Incidents Closed This Month
Indicator Source	Impact VM - Outage Ended on This Month
Indicator Source	Impact VM - Requested Items Closed This Month
Indicator Source	Impact VM - Requests Fulfilled in the This Month
Automated	Impact VM - ITSM - Mean Time to Restore - Unplanned Outages (hrs)
Automated	Impact VM - ITSM - Average Time to Close an Incident (hrs)
Automated	Impact VM - Number of Closed Incident Originating from Phonecalls
Automated	Impact VM - Average Time to Close a Request (hrs)
Automated	Impact VM - Number of Closed Standard Changes
Automated	Impact VM - ITSM - # of Tier 2+ Agents
Automated	Impact VM - # of Unplanned Outages This Month
Automated	Impact VM - ITSM - Average Time To Close a Change in Hours
Automated	Impact VM - ITSM - # of Tier 1 Agents
Automated	Impact VM - # Requested Items Closed This Month
Automated	Impact VM - # of Requests Fulfilled This Month
Automated	Impact VM - ITSM - # of L1 Incidents Closed This Month
Automated	Impact VM - # of Changes Closed This Month
Automated	Impact VM - ITSM - # of L2+ Incidents Closed This Month

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Artifacts by type (continued)

Artifact type	Description
Automated	Impact VM - ITSM - # of Incidents Closed This Month
Automated	Impact VM - # Automated Requested Items Closed This Month
Automated	Impact VM - ITSM - Number of Active Users
Manual	Impact VM - Legacy ITSM Systems Annual Run-Rate
Formula	Impact VM - ITSM - Ratio of Incidents Closed per Tier 2+ Service Desk Agent This Month
Formula	Impact VM - % of Requested Items Fulfilled that were Automated This Month
Formula	Impact VM - % of Changes that are Standard Closed This Month
Formula	Impact VM - % of Closed Incidents Originating from Phone Call This Month
Formula	Impact VM – ITSM - Ratio of Incidents Closed per Tier 1 Service Desk Agent This Month
Data Collection Job	Impact VM – ITSM - Monthly Data Collection
Data Collection Job	Impact VM – ITSM – Historical Data Collection
Widget	% Closed Changes that were Standard
Widget	% Closed Incidents Originating from Phone Call
Widget	% of Fulfilled Requested Items that were Automated
Widget	Average Time to Close a Change (hrs)
Widget	Average Time to Close a Request (hrs)
Widget	Average Time to Close an Incident (hrs)
Widget	Legacy ITSM System Monthly Run-Rate
Widget	Mean Time to Restore Unplanned Outages (hrs)
Widget	Number of Changes Closed
Widget	Number of Incidents Closed
Widget	Number of Incidents Closed at Tier 1
Widget	Number of Requests Fulfilled
Widget	Number of Tier 2+ Incidents Closed
Widget	Number of Unplanned Outages
Widget	Ratio of Closed Incident per Tier 2+ Agent
Widget	Ratio of Closed Incidents per Tier 1 Service Desk Agent
Widget	Number of Active Users
Dashboard	Impact VM - ITSM
Group Type	Tier 1
Group Type	Tier 2+

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Impact Value Management Data Collection Content Pack for ITOM

Install and configure the Data Collection Content Pack for ITOM.

Perform the steps in the following order:

1. Install the Data Collection Pack for ITOM
2. Configure Data Collection for ITOM
3. Activate Data Collection for ITOM
4. Review ITOM artifacts

You can also modify the configuration at any point, and maintain customizations when you are ready to upgrade. For more information, see Upgrading the Data Collection Content Pack and Modifying the Data Collection configuration.

Install the Data Collection Pack for ITOM

To enable the Data Collection Pack, you must install dependent plugins and activate Data Collection jobs.

Before you begin

The ITOM Success Metric Definitions in this application rely on another application. Ensure that the required plugins are installed if they are not already installed. For more information, see Install Impact Value Management Data Collection Content Pack Apps dependent plugins.

Role required: Impact users

Procedure

1. Navigate to the Impact workspace on your instance.
2. Navigate to **All** > **Impact** > **Configuration** > **Value PA Data Collection Jobs**.
3. Select **Value PA Data Collection jobs**.
4. Search for and select the following:
   - **Impact VM - ITOM - Monthly Data Collection**
   - **Impact VM - ITOM - Historical Data Collection**

   If you're having trouble finding the data collection jobs, check whether the required data collection-dependent plugins are installed correctly. See Install Impact Value Management Data Collection Content Pack Apps dependent plugins.

Configure Data Collection for ITOM

Configure Data Collection for ITOM.

Before you begin

Note: To get the data collection up and running this setup must be done only once.

You need to determine which of your assignment groups are leveraged within the Incident, Change, and Request workflows you consider to be Tier 1 and Tier 2:

- Tier 1: First-line support, most commonly your helpdesk/service desk group(s)
- Tier 2+: Second- and third-line support, these are your specialist teams as well as potential vendor teams

Role required: admin, pa_power_user, pa_admin, or pa_data_collector

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Procedure

1. Navigate to the **Groups** module in User Administration.
2. Open the group records to use in the Incident process as the Assignment Group.
3. Add one of the following types to the record:
   - Tier 1
   - Tier 2+

   The type might not show up by default on the group form. Request a system administrator to make the field visible on the form.
4. Update the record.
5. Repeat these steps for all assignment groups.



6. To validate, run a query against the incident table for assignment groups that are still unclassified to validate you have classified all groups.



   If your assignment groups change, you will have to reclassify them.
7. For issues where the Assignment Group field isn't showing Tier 1 or Tier 2 groups in incidents, changes, or requests, ensure that the ITIL type is also added to the group:

   a. Navigate to **System Security > Users and Groups > Groups**.

   b. In the Type field, add `itil`.

   c. Save and update the form.

   d. Refresh the incident, change, or request form and recheck the Assignment Group.
   The group should now appear.

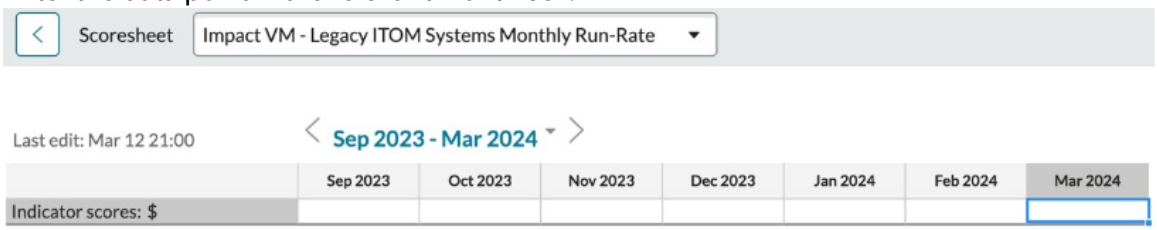
8. For the Manual Indicators, add a new data point every month.
   As an example, given the fixed nature of the Impact VM - Legacy ITOM Systems Annual Run-Rate indicator, you only need to enter this data point once.

> **Important:** If you do not have full access to Performance/Platform Analytics through a Pro or Enterprise subscription, you are required to enter this data point every month.

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a. Navigate to **Performance/Platform Analytics** > **Scoresheet**, and then select **Impact VM - Legacy ITOM Systems Annual Run-Rate**.

b. Enter the data point in the relevant month cell.



Activate Data Collection for ITOM

Activate the Data Collection Pack for ITOM after you enable and configure it.

Before you begin

Monthly Data collection within Performance/Performance Analytics runs on a schedule.

Important: To get data collection up and running, perform the monthly setup only once.

Role required: admin, pa_admin, or pa_data_collector

Procedure

1. Navigate to **Performance/PlatformAnalytics** > **Data Collector** > **Jobs**, and then open **Impact VM – ITOM - Monthly Data Collection**.
2. Select **Active**, and then update the record.

   Important: For monthly job execution, you should not make changes to the Day (of the month) and the Time (of the day) of the job. Time of the day is determined based on the system time zone. You should keep the default schedule as it works best with the current frequencies of the indicators.

3. To do a trial run of the monthly data collection, select **Execute Now**.
4. Navigate to **Performance/Platform Analytics** > **Dashboard**, and then open **Impact VM – ITOM**.
   There are two tabs: Monthly – ITOM and Quarterly – ITOM.
5. **Optional:** To validate the scores on the dashboard, compare them with the numbers you get from applying the same filters conditions on the fact table.
6. **Optional:** To run historical jobs, do the following:

   a. Navigate to **Performance/Platform Analytics** > **Data Collector** > **>Jobs**, and then open **Impact VM – ITOM – Historical Data Collection**.

      Important: Do NOT select Active as Historical Data collection within Performance/ Platform Analytics runs on an on-demand basis.

      For historical job execution, adjust the Relative start months according to the available data.

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- If you do not have a full version of Performance/Platform Analytics, historical data won't be captured beyond 180 days from the job execution date.
- If you have the full version of Performance/Platform Analytics, you can change the Relative start date to a longer timeframe than 6 months. For example, you could change Relative start from 6 months ago to 12 months ago.

b. Select **Execute Now** to run the historical data collection job.

c. Navigate to **Performance/Platform Analytics** > **Dashboard**, and then open **Impact VM – ITOM**.
There are two tabs: Monthly - ITOM and Quarterly - ITOM. To validate historical data for any specific indicator, select the widget on the dashboard.

Review ITOM artifacts

The Data Collection app contains a pre-build data metric structure for the ServiceNow Performance Analytics application and includes artifact types.

Performance/Platform analytics

The content pack comes with the following artifact types. For configuring the process, Group Type is the group classification for the User Administration - Groups.

Performance/Platform Analytics artifact types

Artifact type	Description
Indicator Source	Captures the basic data sets and commits them to the working memory of the platform to provide the foundation for the calculations. This is also called a data cube.
Automated Indicator	Basic calculation definition on the indicator source data set, potentially with additional filter conditions that you apply before making the calculation.
Manual Indicator	Metric for which there is no data set within the platform. Requires you to manually add a data point.
Formula Indicator	A more comprehensive calculation, such as % and ratio calculations that require multiple automated indicator data points for the calculation.
Data Collection Jobs	Schedule on which the automated data collection will run.
Widgets	Configuration for the UI visualization of an indicator.
Dashboard	Display of a collection of widgets on a pane. This dashboard contains two tabs. One tab contains widgets showing quarterly values, and the other contains widgets showing monthly values.

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Artifacts by type

Note: The frequencies of all applicable indicators and indicator sources have been changed to monthly from quarterly. If this is not the first time using this content pack, you should run a baseline historical job (data collection job) to capture applicable historical data. The historical data will be visualized in a future enhancement of the dashboard.

Also, this version of the ITOM Data Collection app relies on ITSM product licensing for the metrics highlighted below. Currently, the workaround involves manually updating these metrics in Impact.

The app contains the following artifacts for each of the above-specified artifact types.

Artifacts by type

Artifact type	Name
Automated	Impact VM - ITOM - # of Incidents Closed This Month
Automated	Impact VM - ITOM - # of L1 Incidents Closed This Month
Automated	Impact VM - ITOM - # of L2+ Incidents Closed This Month
Automated	Impact VM - ITOM - Average Time to Close an Incident (hrs)
Automated	Impact VM - Auto-Created Incidents in This Month
Automated	Impact VM - Number Alerts Triggered in This Month
Automated	Impact VM - Number of Virtual Events in This Month
Automated	Impact VM - Number of Non-Secondary Alerts in This Month
Automated	Impact VM - ITOM - # of Unplanned Outages This Month
Automated	Impact VM - ITOM - Mean Time to Restore - Unplanned Outages (hrs)
Automated	Impact VM - ITOM - Number of Active Users
Automated	Impact VM - ITOM - # of Tier 1 Agents
Automated	Impact VM - ITOM -# of Tier 2+ Agents
Formula	Impact VM - ITOM - Ratio of Incidents Closed per Tier 1 Service Desk Agent This Month
Formula	Impact VM - ITOM - Ratio of Incidents Closed per Tier 2+ Service Desk Agent This Month
Formula	Impact VM - % of Auto-Created Incidents this Month
Formula	Impact VM - % Alert Correlation in This Month
Manual	Impact VM - Legacy ITOM Systems Monthly Run-Rate
Data Collection Job	Impact VM - Monthly Data Collection
Widget	% of Auto-Created Incidents
Widget	% of Alert Correlation
Widget	Average Time to Close an Incident (hrs)
Widget	Legacy ITOM System Run-Rate
Widget	Mean Time to Restore Unplanned Outages (hrs)

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Artifacts by type (continued)

Artifact type	Name
Widget	Number of Active Users
Widget	Number of Incident Closed
Widget	Number of Incidents Closed at Tier 1
Widget	Number of Tier 2+ Incidents Closed
Widget	Number of Unplanned Outages
Widget	Ratio of Closed Incident per Tier 2+ Agent
Widget	Ratio of Closed Incidents per Tier 1 Service Desk Agent
Dashboard	Impact VM - ITOM
Group Type	Tier 1
Group Type	Tier 2+

Impact Value Management Data Collection Content Pack for HR

Install and configure the HR Data Collection Content Pack.

Perform the steps in the following order:

1. Install the Data Collection Pack for HR
2. Configure Data Collection for HR
3. Activate Data Collection for HR
4. Review HR artifacts

You can also modify the configuration at any point, and maintain customizations when you are ready to upgrade. For more information, see Modifying the Data Collection configuration and Upgrading the Data Collection Content Pack.

Install the Data Collection Pack for HR

To enable the Data Collection Pack, you must install dependent plugins and activate Data Collection jobs.

Before you begin

The HR Success Metric Definitions in this application rely on another application. Ensure that the required plugins are installed if they are not already installed. For more information, see Install Impact Value Management Data Collection Content Pack Apps dependent plugins.

The HR Success Metric Definitions in this application are also dependent on the following Content Packs from the store for the pre-build HR Service Definitions:

- Offboarding - Voluntary Separation
- Offboarding - Reduction In Force
- Offboarding - Involuntary Separation
- Employee Transfers

Role required: Impact users

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Procedure

1. Navigate to the Impact workspace on your instance.
2. Navigate to **All** > **Impact** > **Configuration** > **Value PA Data Collection Jobs**.
3. Select **Value PA Data Collection jobs**.
4. Search for and select the following:
   - **Impact VM - HR - Monthly Data Collection**
   - **Impact VM - HR - Historical Data Collection**

   If you're having trouble finding the data collection jobs, check whether the required data collection-dependent plugins are installed correctly. See Install Impact Value Management Data Collection Content Pack Apps dependent plugins.

Configure Data Collection for HR

Configure Data Collection for HR.

Before you begin

Note: To get the data collection up and running this setup must be done only once.

You need to determine which of your assignment groups are leveraged within the Incident, Change, and Request workflows you consider to be Tier 1 and Tier 2:

- Tier 1: First-line support, most commonly your helpdesk/service desk group(s)
- Tier 2+: Second- and third-line support, these are your specialist teams as well as potential vendor teams

Role required: admin, pa_power_user, pa_admin, or pa_data_collector

Procedure

1. Navigate to the **Groups** module in User Administration.
2. Open the group records to use in the Incident process as the Assignment Group.
3. Add one of the following types to the record:
   - Tier 1
   - Tier 2+

   The type might not show up by default on the group form. Request a system administrator to make the field visible on the form.
4. Add the **human_resources** type to the record to set it apart from other tiering groups in other product lines.
5. Update the record.
6. Repeat these steps for all potential assignment groups.



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7. To validate, run a query against the HR Case table for assignment groups that are still unclassified to validate you have classified all groups.



If your assignment groups change, you will have to reclassify them.

8. For issues where the Assignment Group field isn't showing Tier 1 or Tier 2 groups in incidents, changes, or requests, ensure that the ITIL type is also added to the group:

   a. Navigate to **System Security > Users and Groups > Groups**.

   b. In the Type field, add `itil`.

   c. Save and update the form.

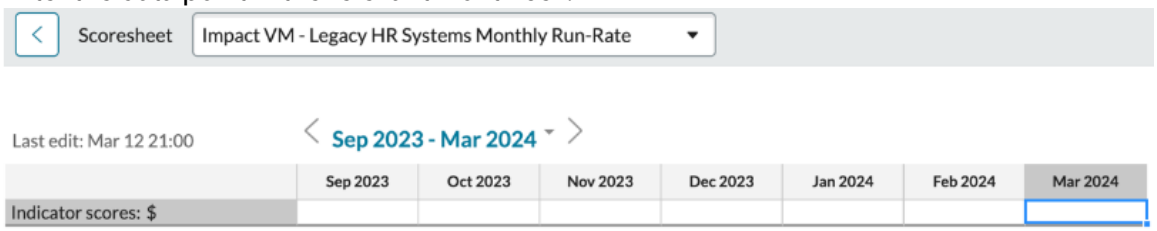
   d. Refresh the incident, change, or request form and recheck the Assignment Group. The group should now appear.

9. For the Manual Indicators, add a new data point every month.
   As an example, given the fixed nature of the Impact VM - Legacy HR Systems Annual Run-Rate indicator, you only need to enter this data point once.

> **Important:** If you do not have full access to Performance/Platform Analytics through a Pro or Enterprise subscription, you are required to enter this data point every month.

   a. Navigate to **Performance/Platform Analytics** > **Scoresheet**, and then select **Impact VM - Legacy HR Systems Annual Run-Rate**.

   b. Enter the data point in the relevant month cell.



Activate Data Collection for HR

Activate the Data Collection Pack for HR after you enable and configure it.

Before you begin

Monthly Data collection within Performance/Performance Analytics runs on a schedule.

> **Important:** To get data collection up and running, perform the monthly setup only once.

Role required: admin, pa_admin, or pa_data_collector

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Procedure

1. Navigate to **Performance/PlatformAnalytics** > **Data Collector** > **Jobs**, and then open **Impact VM – HR - Monthly Data Collection**.
2. Select **Active**, and then update the record.

   Important: For monthly job execution, you should not make changes to the Day (of the month) and the Time (of the day) of the job. Time of the day is determined based on the system time zone. You should keep the default schedule as it works best with the current frequencies of the indicators.

3. To do a trial run of the monthly data collection, select **Execute Now**.
4. Navigate to **Platform Analytics** > **Dashboard**, and then open **Impact VM – HR**.
   There are two tabs: Monthly – HR and Quarterly – HR.
5. **Optional:** To validate the scores on the dashboard, compare them with the numbers you get from applying the same filter conditions on the fact table.
6. **Optional:** To run historical jobs, do the following:

   a. Navigate to **Performance/Platform Analytics** > **Data Collector** > **Jobs**, and then open **Impact VM – HR – Historical Data Collection**.

      Important: Do NOT select Active asHistorical Data collection within Performance/ Platform Analytics runs on an on-demand basis.

      For historical job execution, adjust the Relative start months according to the available data.

      - If you do not have a full version of Performance/Platform Analytics, historical data won't be captured beyond 180 days from the job execution date.
      - If you have the full version of Performance/Platform Analytics, you can change the Relative start date to a longer timeframe than 6 months. For example, you could change Relative start from 6 months ago to 12 months ago.

   b. Select **Execute Now** to run the historical data collection job.

   c. Navigate to **Performance/Platform Analytics** > **Dashboard**, and then open **Impact VM – HR**.
   There are two tabs: Monthly - HR and Quarterly - HR.

   d. To validate historical data for any specific indicator, select the widget on the dashboard.

Review HR artifacts

The Data Collection app contains a pre-build data metric structure for the ServiceNow Performance Analytics application.

Performance/Platform analytics

The content pack comes with the following artifact types. For configuring the process, Group Type is the group classification for the User Administration - Groups.

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Performance/Platform Analytics artifact types

Artifact type	Description
Indicator Source	Captures the basic data sets and commits them to the working memory of the platform to provide the foundation for the calculations. This is also called a data cube.
Automated Indicator	Basic calculation definition on the indicator source data set, potentially with additional filter conditions that you apply before making the calculation.
Manual Indicator	Metric for which there is no data set within the platform. Requires you to manually add a data point.
Formula Indicator	A more comprehensive calculation, such as % and ratio calculations that require multiple automated indicator data points for the calculation.
Data Collection Jobs	Schedule on which the automated data collection will run.
Widgets	Configuration for the UI visualization of an indicator.
Dashboard	Display of a collection of widgets on a pane. This dashboard contains two tabs. One tab contains widgets showing quarterly values, and the other contains widgets showing monthly values.

Artifacts by type

The app contains the following artifacts for each of the above-specified artifact types.

Note: The frequencies of all applicable indicators and indicator sources have been changed to monthly from quarterly. If this is not the first time using this content pack, you should run a baseline historical job (data collection job) to capture applicable historical data. The historical data will be visualized in a future enhancement of the dashboard.

Artifacts by type

Artifact type	Name
Indicator Source	Impact VM - Active Users
Indicator Source	Impact VM - Employee Onboarded This Month
Indicator Source	Impact VM - HR Lifecycle Tasks Closed This Month
Indicator Source	Impact VM - HR Cases Opened This Month
Indicator Source	Impact VM - Employee Offboarded This Month
Indicator Source	Impact VM - Group Members
Indicator Source	Impact VM - Cases Closed This Month
Automated	Impact VM - Opened HR Cases Originating from Phonecalls
Automated	Impact VM - Number of Tier 2+ HR Agents
Automated	Impact VM - Number of TIer 1 HR Agents
Automated	Impact VM - Number of Transfer Tasks This Month
Automated	Impact VM – Number of Tier 2+ HR Cases Closed This Month

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Artifacts by type (continued)

Artifact type	Name
Automated	Impact VM - Number of Tier 1 HR Cases Closed This Month
Automated	Impact VM - Number of Transfer Lifecycle Event Cases Closed This Month
Automated	Impact VM - Number of Offboarding Lifecycle Event Cases Closed This Month
Automated	Impact VM - Number of New Hires Separated This Month
Automated	Impact VM - Number of Onboarding Tasks This Month
Automated	Impact VM - Number of Offboarding Tasks This Month
Automated	Impact VM - Number of Opened HR Cases This Month
Automated	Impact VM - Number of Onboarding Lifecycle Event Cases Closed This Month
Automated	Impact VM - Number of HR Cases Closed This Month
Automated	Impact VM - Number of New Hires This Month
Formula	Impact VM - Year 1 New Hire Attrition Rate This Month
Formula	Impact VM - Ratio of Tier 2+ Cases per Tier 2+ Agent
Formula	Impact VM - Ratio of Tier 1 Cases per Tier 1 Agent
Formula	Impact VM - Average Activities per Transfer Case This Month
Formula	Impact VM - Average Activities per Offboarding Case This Month
Formula	Impact VM - Average Activities per Onboarding Case This Month
Formula	Impact VM - % of Opened HR Cases Originating from Phonecalls This Month
Manual	Impact VM - Legacy HR Systems Annual Run-Rate
Data Collection Job	Impact VM - Monthly Data Collection
Widget	Ratio of Tier 2+ Cases to Tier 2+ Agents
Widget	Percent of HR Cases Originating for Phonecalls
Widget	Legacy HR systems annual run-rate
Widget	Average Activities per Offboarding Case This Month
Widget	Number of HR Cases Closed This Month
Widget	First Year Employee Attrition Rate This Month
Widget	Number of Tier 1 HR Cases Closed This Month
Widget	Average Activities per Onboarding Case This Month
Widget	Ratio of T1 Cases to Tier 1 Agents
Widget	Average Activities per Transfer Case This Month
Widget	Number of Tier 2 HR Cases Closed This Month

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Artifacts by type (continued)

Artifact type	Name
Dashboard	Impact VM - HR
Group Type	Tier 1
Group Type	Tier 2+

Impact Value Management Data Collection Content Pack for SecOps

Install and configure the Data Collection Content Pack for SecOps.

Perform the steps in the following order:

1. Install the Data Collection Pack for SecOps
2. Configure Data Collection for SecOps
3. Activate Data Collection for SecOps
4. Review SecOps artifacts

You can also modify the configuration at any point, and maintain customizations when you are ready to upgrade. For more information, see Modifying the Data Collection configuration and Upgrading the Data Collection Content Pack.

Install the Data Collection Pack for SecOps

To enable the Data Collection Pack, you must install dependent plugins and activate Data Collection jobs.

Before you begin

The SecOps Success Metric Definitions in this application rely on another applications. Ensure that the required plugins are installed if they are not already installed. For more information, see Install Impact Value Management Data Collection Content Pack Apps dependent plugins.

Role required: Impact users

Procedure

1. Navigate to the Impact workspace on your instance.
2. Navigate to **All** > **Impact** > **Configuration** > **Value PA Data Collection Jobs**.
3. Select **Value PA Data Collection jobs**.
4. Search for and select the following:
   - **Impact VM - SecOps - Monthly Data Collection**
   - **Impact VM - SecOps - Historical Data Collection**

   If you're having trouble finding the data collection jobs, check whether the required data collection-dependent plugins are installed correctly. See Install Impact Value Management Data Collection Content Pack Apps dependent plugins.

Configure Data Collection for SecOps

Configure Data Collection for SecOps.

Before you begin

You do not need to assign Group Types to configure Data Collection for SecOps, but you do need to enter manual data points.

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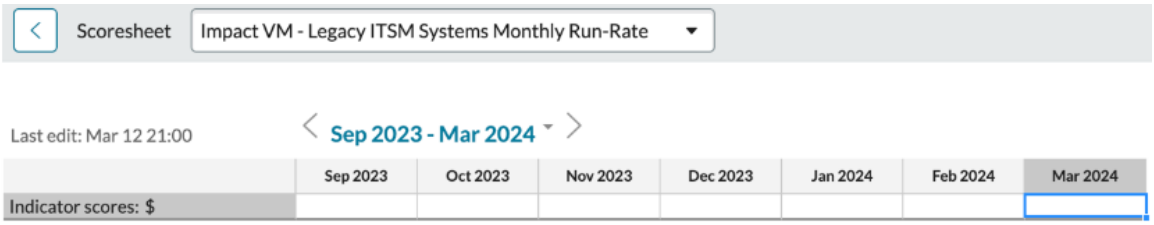
For the Manual Indicators, you must add a new data point every month. For example, given the fixed nature of the Impact VM - Legacy SecOps Systems Annual Run-Rate indicator, you only need to enter this data point once.

Important: If you do not have full access to Performance/Platform Analytics through a Pro or Enterprise subscription, you are required to enter this data point every month.

Role required: admin, pa_power_user, pa_admin, or pa_data_collector

Procedure

1. Navigate to **Performance/PlatformAnalytics** > **Scoresheet**, and then select **Impact VM - Legacy SecOps Systems Annual Run-Rate**.
2. Enter the data point in the relevant month cell.



Activate Data Collection for SecOps

Activate the Data Collection Pack for SecOps after you enable and configure it.

Before you begin

Monthly Data collection within Performance/Performance Analytics runs on a schedule.

Important: To get data collection up and running, perform the monthly setup only once.

Role required: admin, pa_admin, or pa_data_collector

Procedure

1. Navigate to **Performance/PlatformAnalytics** > **Data Collector** > **Jobs**, and then open **Impact VM – SecOps - Monthly Data Collection**.
2. Select **Active**, and then update the record.

   Important: For monthly job execution, you should not make changes to the Day (of the month) and the Time (of the day) of the job. Time of the day is determined based on the system time zone. You should keep the default schedule as it works best with the current frequencies of the indicators.

3. To do a trial run of the monthly data collection, select **Execute Now**.
4. Navigate to **Performance/Platform Analytics** > **Dashboard**, and then open **Impact VM – SecOps**.
   There are two tabs: Monthly – SecOps and Quarterly – SecOps.
5. **Optional:** To validate the scores on the dashboard, compare them with the numbers you get from applying the same filter conditions on the fact table.
6. **Optional:** To run historical jobs, do the following:

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a. Navigate to **Performance/Platform Analytics** > **Data Collector** > **Jobs**, and then open **Impact VM – SecOps – Historical Data Collection**.

> **Important:** Do NOT select Active as Historical Data collection within Performance/Platform Analytics runs on an on-demand basis.

For historical job execution, adjust the Relative start months according to the available data.

- If you do not have a full version of Performance/Platform Analytics, historical data won't be captured beyond 180 days from the job execution date.
- If you have the full version of Performance/Platform Analytics, you can change the Relative start date to a longer timeframe than 6 months. For example, you could change Relative start from 6 months ago to 12 months ago.

b. Select **Execute Now** to run the historical data collection job.

c. Navigate to **Platform Analytics** > **Dashboard**, and then open **Impact VM – SecOps**. There are two tabs: Monthly - SecOps and Quarterly - SecOps.

(Optional) To validate historical data for any specific indicator, select the widget on the dashboard.

Review SecOps artifacts

The Data Collection app contains a pre-build data metric structure for the ServiceNow Performance/Platform Analytics application.

The content pack comes with the following artifact types.

Performance/Platform Analytics artifact types

Artifact type	Description
Indicator Source	Captures the basic data sets and commits them to the working memory of the platform to provide the foundation for the calculations. This is also called a data cube.
Automated Indicator	Basic calculation definition on the indicator source data set, potentially with additional filter conditions that you apply before making the calculation.
Manual Indicator	Metric for which there is no data set within the platform. Requires you to manually add a data point.
Formula Indicator	A more comprehensive calculation, such as % and ratio calculations that require multiple automated indicator data points for the calculation.
Data Collection Jobs	Schedule on which the automated data collection will run.
Widgets	Configuration for the UI visualization of an indicator.
Dashboard	Display of a collection of widgets on a pane. This dashboard contains two tabs. One tab contains widgets showing quarterly values, and the other contains widgets showing monthly values.

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Artifacts by type

The app contains the following artifacts for each of the above-specified artifact types.

Artifacts by type

Artifact type	Name
Data Collection Job	Impact VM - SecOps - Monthly Data Collection
Data Collection Job	Impact VM - SecOps - Monthly Historical Data Collection
Dashboard	Impact VM - SecOps
Widget	Ratio of # of vulnerable items with remediation task to vulnerability team
Widget	Ratio of closed vulnerability item to closed remediation task
Widget	% of SI's resolved by the SOC Tier 1 response team
Widget	Ratio of Security Incidents handled at Tier 1 to # of SOC Tier 1 FTE
Widget	Ratio of Security Incidents handled at Tier 2+ to # of SOC Tier 2+ FTE
Widget	% of critical vulnerable items not addressed
Widget	Average age of closed critical vulnerability items
Widget	% of non-critical vulnerable items not addressed
Widget	Avg. age of non-critical vulnerable item at closure (days)
Widget	Mean time to close a SI (days)
Formula	Impact VM - Ratio of number of vulnerable items with remediation task to the size of vulnerability team
Automated	Impact VM - # of vulnerable items with remediation task opened this month
Automated	Impact VM - # of vulnerability team FTEs
Formula	Impact VM - Ratio of closed vulnerability item to closed remediation task
Automated	Impact VM - # of closed vulnerable items this month
Automated	Impact VM - # of closed remediation task this month
Formula	Impact VM - % of Security Incidents resolved by the dedicated members of the SOC (tier one)
Automated	Impact VM - Number of security incidents closed by Tier1 this month
Automated	Impact VM - Number of closed security incidents this month
Formula	Impact VM - Ratio of total security incidents resolved at Tier 1 to the total number of SOC Tier 1 team
Automated	Impact VM - # of SOC analyst (Tier 1)
Formula	Impact VM - Ratio of total security incidents resolved at Tier 2+ to the toal number of SOC Tier 2+ team

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Artifacts by type (continued)

Artifact type	Name
Automated	Impact VM - Number of security incidents closed by Tier 2+ this month
Automated	Impact VM - # of SOC analyst (Tier 2)
Formula	Impact VM - % of critical vulnerable items not addressed
Automated	Impact VM - # of open critical vulnerable items this month
Automated	Impact VM - # of vulnerability opened this month
Formula	Impact VM - Average age of closed critical vulnerability items
Automated	Impact VM - Time to close critical vulnerability items
Automated	Impact VM - Vulnerable items P1 - P2 this month
Formula	Impact VM - % of non-critical vulnerable items not addressed
Automated	Impact VM - # of open non-critical vulnerable items this month
Formula	Impact VM - Average age of closed non-critical vulnerability items
Automated	Impact VM - Average age of non-critical vulnerable items at closure (days)
Automated	Impact VM - # of non critical (P3, P4, P5) vulnerable items this month
Formula	Impact VM - Mean time to close SI (days)
Automated	Impact VM - Summed duration of closed security incident

Impact Value Management Data Collection Content Pack for SPM

Install and configure the Data Collection Content Pack for SPM.

Perform the steps in the following order:

1. Install the Data Collection Pack for SPM
2. Configure Data Collection for SPM
3. Activate Data Collection for SPM
4. Review SPM artifacts

You can also modify the configuration at any point, and maintain customizations when you are ready to upgrade. For more information, see Modifying the Data Collection configuration and Upgrading the Data Collection Content Pack.

Install the Data Collection Pack for SPM

To enable the Data Collection Pack, you must install dependent plugins and activate Data Collection jobs.

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Before you begin

The SPM Success Metric Definitions in this application rely on another application. Ensure that the required plugins are installed if they are not already installed. For more information, see Install Impact Value Management Data Collection Content Pack Apps dependent plugins.

Role required: Impact users

Procedure

1. Navigate to the Impact workspace on your instance.
2. Navigate to **All** > **Impact** > **Configuration** > **Value PA Data Collection Jobs**.
3. Select **Value PA Data Collection jobs**.
4. Search for and select the following:
   - **Impact VM - SPM - Monthly Data Collection**
   - **Impact VM - SPM - Historical Data Collection**

   If you're having trouble finding the data collection jobs, check whether the required data collection-dependent plugins are installed correctly. See Install Impact Value Management Data Collection Content Pack Apps dependent plugins.

Review SPM artifacts

The Data Collection app contains a pre-build data metric structure for the ServiceNow Performance/Platform Analytics application.

The content pack comes with the following artifact types.

Performance/Platform Analytics artifact types

Artifact type	Description
Indicator Source	Captures the basic data sets and commits them to the working memory of the platform to provide the foundation for the calculations. This is also called a data cube.
Automated Indicator	Basic calculation definition on the indicator source data set, potentially with additional filter conditions that you apply before making the calculation.
Manual Indicator	Metric for which there is no data set within the platform. Requires you to manually add a data point.
Formula Indicator	A more comprehensive calculation, such as % and ratio calculations that require multiple automated indicator data points for the calculation.
Data Collection Jobs	Schedule on which the automated data collection will run.
Widgets	Configuration for the UI visualization of an indicator.
Dashboard	Display of a collection of widgets on a pane. This dashboard contains two tabs. One tab contains widgets showing quarterly values, and the other contains widgets showing monthly values.

Artifacts by type

The app contains the following artifacts for each of the above-specified artifact types.

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Artifacts by type

Artifact type	Name
Data Collection Job	Impact VM – SPM - Monthly Data Collection
Data Collection Job	Impact VM – SPM - Historical Data Collection
Dashboard	Impact VM - SPM
Widget	% of projects completed that are identified as aligned to strategy
Widget	Avg. cycle time for approved demand (days)
Widget	Avg. project duration (weeks)
Widget	Project Budget actuals vs. forecast
Widget	Avg. budget under management per PM
Widget	Avg. total effort required per demand
Widget	% of project team spent on administrative tasks
Widget	Total benefits of demands to decommission/migrate legacy system
Widget	% attainment of forecasted benefits this month
Formula	Impact VM - % of projects completed that are identified as aligned to strategy
Automated	Impact VM - # of projects completed this month
Automated	Impact VM - # of projects completed this month with primary goal assigned
Formula	Impact VM - Avg. cycle time for approved demand (days)
Automated	Impact VM - Total Age of Demand to Project This Month (Days)
Automated	Impact VM - Total demands to projects this month
Formula	Impact VM - Avg. project duration (weeks)
Automated	Impact VM - Total number of the completed projects this month
Automated	Impact VM - Sum of project Actual Duration
Formula	Impact VM - Project Budget actuals vs. forecast
Automated	Impact VM - Total actual cost for the projects ended this month
Automated	Impact VM - Total budgeted cost for the projects ended this month
Formula	Impact VM - Avg. budget under management per PM
Automated	Impact VM - Number of Project managers
Formula	Impact VM - Avg. total effort required per demand
Automated	Impact VM - # of demands completed this month
Automated	Impact VM - Total allocated hours for all demands completed

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Artifacts by type (continued)

Artifact type	Name
Manual	Impact VM - % of project team spent on administrative tasks
Manual	Impact VM - Total benefits of demands to decommission/ migrate legacy system
Formula	Impact VM - % attainment of forecasted benefits this month
Automated	Impact VM - Total actual benefits attained for the completed projects this month
Automated	Impact VM - Total forecasted benefits attained for the completed projects this month

Configure Data Collection for SPM

Configure Data Collection for SPM.

Before you begin

You do not need to assign Group Types to configure Data Collection for SPM, but you do need to enter manual data points.

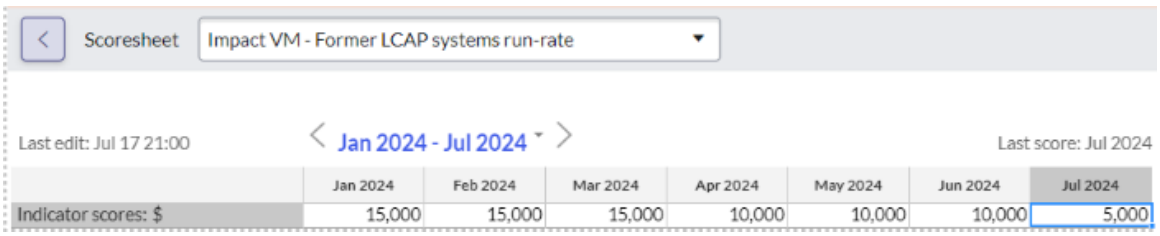
For the Manual Indicators, you must add a new data point every month. For example, given the fixed nature of the Impact VM - Legacy SPM Systems Annual Run-Rate indicator, you only need to enter this data point once.

Important: If you do not have full access to Performance/Platform Analytics through a Pro or Enterprise subscription, you are required to enter this data point every month

Role required: admin, pa_power_user, pa_admin, or pa_data_collector

Procedure

1. Navigate to **Performance/PlatformAnalytics** > **Scoresheet**, and then select **Impact VM - Legacy SPM Systems Annual Run-Rate**.
2. Enter the data point in the relevant month cell.



Activate Data Collection for SPM

Activate the Data Collection Pack for SPM after you enable and configure it.

Before you begin

Monthly Data collection within Performance/Performance Analytics runs on a schedule.

Important: To get data collection up and running, perform the monthly setup only once.

Role required: admin, pa_admin, or pa_data_collector

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Procedure

1. Navigate to **Performance/PlatformAnalytics** > **Data Collector** > **Jobs**, and then open **Impact VM – SPM - Monthly Data Collection**.
2. Select **Active**, and then update the record.

   Important: For monthly job execution, you should not make changes to the Day (of the month) and the Time (of the day) of the job. Time of the day is determined based on the system time zone. You should keep the default schedule as it works best with the current frequencies of the indicators.

3. To do a trial run of the monthly data collection, select **Execute Now**.
4. Navigate to **Performance/Platform Analytics** > **Dashboard**, and then open **Impact VM – SPM**. There are two tabs: Monthly – SPM and Quarterly – SPM.
5. **Optional:** To validate the scores on the dashboard, compare them with the numbers you get from applying the same filter conditions on the fact table.
6. **Optional:** To run historical jobs, do the following:

   a. Navigate to **Performance/Platform Analytics** > **Data Collector** > **Jobs**, and then open **Impact VM – SPM – Historical Data Collection**.

      Important: Do NOT select Active as Historical Data collection within Performance/Platform Analytics runs on an on-demand basis.

      For historical job execution, adjust the Relative start months according to the available data.

      - If you do not have a full version of Performance/Platform Analytics, historical data won't be captured beyond 180 days from the job execution date.
      - If you have the full version of Performance/Platform Analytics, you can change the Relative start date to a longer timeframe than 6 months. For example, you could change Relative start from 6 months ago to 12 months ago.

   b. Select **Execute Now** to run the historical data collection job.

   c. Navigate to **Platform Analytics** > **Dashboard**, and then open **Impact VM – SPM**. There are two tabs: Monthly - SPM and Quarterly - SPM.

      (Optional) To validate historical data for any specific indicator, select the widget on the dashboard.

Impact Value Management Data Collection Content Pack for IRM

Install and configure the Data Collection Content Pack for IRM.

Perform the steps in the following order:

1. Install the Data Collection Pack for IRM
2. Configure Data Collection for IRM
3. Activate Data Collection for IRM
4. Review IRM artifacts

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You can also modify the configuration at any point, and maintain customizations when you are ready to upgrade. For more information, see Modifying the Data Collection configuration and Upgrading the Data Collection Content Pack.

Install the Data Collection Pack for IRM

To enable the Data Collection Pack, you must install dependent plugins and activate Data Collection jobs.

Before you begin

The IRM Success Metric Definitions in this application rely on another application. Ensure that the required plugins are installed if they are not already installed. For more information, see Install Impact Value Management Data Collection Content Pack Apps dependent plugins.

Role required: Impact users

Procedure

1. Navigate to the Impact workspace on your instance.
2. Navigate to **All** > **Impact** > **Configuration** > **Value PA Data Collection Jobs**.
3. Select **Value PA Data Collection jobs**.
4. Search for and select the following:
   - **Impact VM - IRM - Monthly Data Collection**
   - **Impact VM - IRM - Historical Data Collection**

   If you're having trouble finding the data collection jobs, check whether the required data collection-dependent plugins are installed correctly. See Install Impact Value Management Data Collection Content Pack Apps dependent plugins.

Configure Data Collection for IRM

Configure Data Collection for IRM.

Before you begin

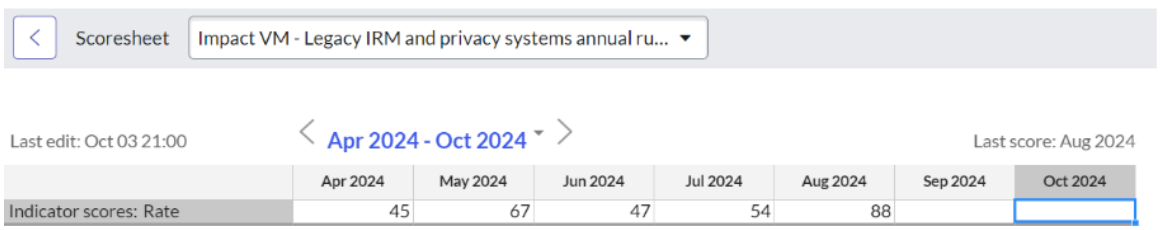
For the Manual Indicators, you must add a new data point every month. For example, given the fixed nature of the Impact VM - Legacy IRM Systems Annual Run-Rate indicator, you only need to enter this data point once.

Important: If you do not have full access to Performance/Platform Analytics through a Pro or Enterprise subscription, you are required to enter this data point every month

Role required: admin, pa_power_user, pa_admin, or pa_data_collector

Procedure

1. Navigate to **Performance/PlatformAnalytics** > **Scoresheet**, and then select **Impact VM - Legacy IRM Systems Annual Run-Rate**.
2. Enter the data point in the relevant month cell.



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Activate Data Collection for IRM

Activate the Data Collection Pack for IRM after you enable and configure it.

Before you begin

Monthly Data collection within Performance/Performance Analytics runs on a schedule.

> **Important:** To get data collection up and running, perform the monthly setup only once.

Role required: admin, pa_admin, or pa_data_collector

Procedure

1. Navigate to **Performance/Platform Analytics** > **Data Collector** > **Jobs**, and then open **Impact VM – IRM - Monthly Data Collection**.
2. Select **Active**, and then update the record.

   > **Important:** For monthly job execution, you should not make changes to the Day (of the month) and the Time (of the day) of the job. Time of the day is determined based on the system time zone. You should keep the default schedule as it works best with the current frequencies of the indicators.

3. To do a trial run of the monthly data collection, select **Execute Now**.
4. Navigate to **Platform Analytics** > **Dashboard**, and then open **Impact VM – IRM**.
   There are two tabs: Monthly – IRM and Quarterly – IRM.
5. **Optional:** To validate the scores on the dashboard, compare them with the numbers you get from applying the same filter conditions on the fact table.
6. **Optional:** To run historical jobs, do the following:

   a. Navigate to **Performance/Platform Analytics** > **Data Collector** > **Jobs**, and then open **Impact VM – IRM – Historical Data Collection**.

      > **Important:** Do NOT select Active as Historical Data collection within Performance/Platform Analytics runs on an on-demand basis.

      For historical job execution, adjust the Relative start months according to the available data.

      - If you do not have a full version of Performance/Platform Analytics, historical data won't be captured beyond 180 days from the job execution date.
      - If you have the full version of Performance/Platform Analytics, you can change the Relative start date to a longer timeframe than 6 months. For example, you could change Relative start from 6 months ago to 12 months ago.

   b. Select **Execute Now** to run the historical data collection job.

   c. Navigate to **Platform Analytics** > **Dashboard**, and then open **Impact VM – IRM**.
      There are two tabs: Monthly - IRM and Quarterly - IRM.

      (Optional) To validate historical data for any specific indicator, select the widget on the dashboard.

Review IRM artifacts

The Data Collection app contains a pre-build data metric structure for the ServiceNow Performance/Platform Analytics application.

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The content pack comes with the following artifact types.

Performance/Platform Analytics artifact types

Artifact type	Description
Indicator Source	Captures the basic data sets and commits them to the working memory of the platform to provide the foundation for the calculations. This is also called a data cube.
Automated Indicator	Basic calculation definition on the indicator source data set, potentially with additional filter conditions that you apply before making the calculation.
Manual Indicator	Metric for which there is no data set within the platform. Requires you to manually add a data point.
Formula Indicator	A more comprehensive calculation, such as % and ratio calculations that require multiple automated indicator data points for the calculation.
Data Collection Jobs	Schedule on which the automated data collection will run.
Widgets	Configuration for the UI visualization of an indicator.
Dashboard	Display of a collection of widgets on a pane. This dashboard contains two tabs. One tab contains widgets showing quarterly values, and the other contains widgets showing monthly values.

Artifacts by type

The app contains the following artifacts for each of the above-specified artifact types.

Artifacts by type

Artifact type	Description
Data Collection Job	Impact VM – IRM - Monthly Data Collection
Data Collection Job	Impact VM – IRM - Historical Data Collection
Dashboard	Impact VM - IRM
Widget	# of employees : # of internal audit team FTEs
Widget	# of controls : # of risk manager FTEs (IT, Ent Op)
Widget	# of major risk events
Widget	Avg. loss per major risk event
Widget	Avg. loss per minor risk event
Widget	Avg. time spent per control per year (hrs)
Widget	# of privacy-related controls : # of privacy team FTEs
Widget	# of minor risk events
Widget	Outsourced risk mgmt. spend as % of avg. risk mgmt. spend
Widget	Legacy IRM and privacy systems annual run-rate

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Artifacts by type (continued)

Artifact type	Description
Formula	Impact VM - Ratio of # of employees : # of Internal Audit team FTEs
Automated	Impact VM - # of Internal Audit team FTEs
Automated	Impact VM - # of Employee
Formula	Impact VM - Ratio of Total number of Controls to # of Risk Managers FTE
Automated	Impact VM - # of Risk Managers FTE
Automated	Impact VM - # of Privacy related controls
Automated	Impact VM - # of Major Risk Events
Formula	Impact VM - Reduction in avg. loss per major risk event
Automated	Impact VM - Gross loss of major risk event
Automated	Impact VM - # of major risk event
Formula	Impact VM - Reduction in avg. loss per minor risk event
Automated	Impact VM - Gross loss for minor risk event
Automated	Impact VM - # of Minor Risk Event
Formula	Impact VM - Avg. time spent per control per year (hrs)
Automated	Impact VM - Total # of controls
Manual	Impact VM - Total time spent per year (Hrs)
Formula	Impact VM - Ratio of # of Privacy related controls: # of privacy team FTEs
Automated	Impact VM - # of Privacy related controls
Automated	Impact VM - # of Privacy team FTEs
Automated	Impact VM - # of Minor Risk Events
Manual	Outsourced risk mgmt. spend as % of avg. risk mgmt. spend
Manual	Legacy IRM and privacy systems annual run-rate

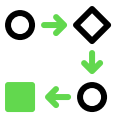
Using Impact

Using Impact available directly through your ServiceNow instance and the Impact Delivery Instance offers a similar experience, but the user interface may vary.

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Key features

Navigation menu options

	Menu	Details
	Navigating Impact	• Use the progression checklist to onboard your team. • Familiarize your team with the Impact Store App features by following the Guided Tour. • Interact with your Impact team. • Receive tailored recommendations for next steps.
	Use the recommendations list	Use the recommendations full list to view the recommendations tailored for you.
	Platform Health	Use diagnostic tools that help you understand the current health of your instance, identify potential issues and setbacks, and take quick corrective action.
	Value management	Captures your objectives, which are high-level goals tied to measurable outcomes that help illustrate value over time.
	Product Adoption Roadmaps	View your capabilities and product adoption roadmaps for your ServiceNow instances: • See the applications, or capabilities, at your disposal for achieving your objectives. • View a recommended implementation sequence for your capabilities organized into specific phases for optimal implementation.
	Initiatives and Accelerators	• Initiatives catalog: Actionable engagements and workstreams that support your digital transformation. • Accelerator catalog: Fixed-scope offerings with experts behind each option to quickly provide value exactly where you need it
	Consumption Report	View your tier features across various accounts including used and unused accelerators, initiatives, instance observer users, developer support users, and active case breakdowns.

Important: In order to access various levels of Impact, a role must be assigned to you. Your Impact Administrator can assign the appropriate roles to you. See Manage Impact users for additional information.

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Navigating Impact

Use Impact to obtain new and updated features quickly. Leverage the home page for a personalized value guidance to get relevant and immediate access to the right content, at the right time.

Important: To access Impact, be sure to have the appropriate entitlements. See Impact packages for details. For setup information, see Configuring Impact.

Impact Home page

Use the Impact Home page to obtain new and updated features quickly. Leverage the home page for a personalized value guidance to get relevant and immediate access to the right content, at the right time.

Important: Users may experience different navigation steps in the user interface between the Impact Store Application and the Impact Delivery Instance.

- For the Impact Store Application, navigate to **All** > **Impact** > **Overview** from your ServiceNow instance.
- For Impact Delivery Instance, navigate to your Impact URL to open the home page.

The Impact Workspace home page is a central hub that guides and enables you to launch your application's key components from each of its respective widgets:

- Recommended next steps
- Learn about Impact
- Curated for you
- Your Impact Squad
- Impact Foundations
- Work Items
- Stay updated
- Impact Delivery Instance

Recommended next steps

Recommended next steps provide personalized suggestions tailored to you. These recommendations are steps that you can ideally focus and act on. Recommendations can be anything like attending a workshop, getting started on a training, applying for an event, initiating an accelerator, and other such activities. Only the latest three published recommendations are displayed here in the home page. To view the complete list, select **View full list**.

You can select any given recommendation and get started on it by selecting **View Details** for each of the recommendations, which displays a model. You can learn about the recommendation and if you aren't interested in that you can reject it by selecting the **Hide** option. Options to act on each recommendation vary depending on the type and source of the recommendation:

- If it's a recommendation that is related to an accelerator, then you can accept it by selecting **Get Started**.
- If it's a recommendation suggested for you to act on it or something that you might be interested in, then select **Open Link**.

If it's a recommendation related to Strategic Portfolio Management (SPM), then you can convert the recommendation to a work item by selecting **Convert to work item**. Based on your specific

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permissions, this action converts the recommendation to a work item and shows the details of the recommendations.

For more information on convert to work item, see:

- Manage work items with recommendations for the Impact Store Application
- Manage work items from an initiative in the Impact Store Application

For more information on recommendations, see Use the recommendations list.

Learn about Impact

Use this section to onboard your team with a step-by-step guidance and help them understand Impact features. The features available are based on your products and package.

Impact Overview

This page has information on all the major areas within Impact such as Introduction, Impact Squad, Value Management, Product Adoption, Platform Health, Expertise Access, Key deliverable. The content is based on your subscription package such as Guided, Advanced, or Total.

Watch demo:

Watch a video demonstration of Impact for a walk-through of the various features of Impact in the Impact Overview Demo modal window.

Guided Tour:

Launch the guided tour to onboard your users to experience the ServiceNow Impact application. Select the **Learn about Impact > Guided Tour** link to familiarize yourself with the Impact navigation menu and other feature links in the home page of the Impact store app.

What's new:

When the customers land on the homepage for the first time, the What's new modal displays the core new features. If you wish to view the modal information anytime during the impact session, select the **Learn about Impact > What's new** link.

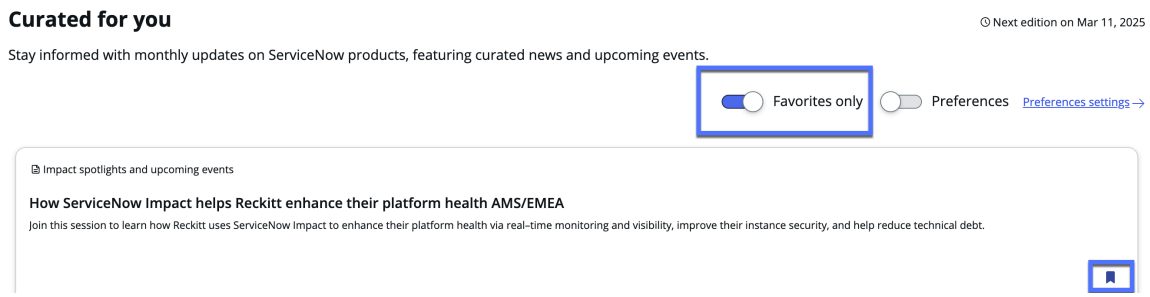
Curated for you

This section features current information, curated news, webinars, workshops, and upcoming events that are specific to your product and organization. The Impact Squad team prepares monthly digests and content relevant to you, and the topics appear here as the highlights.

Use the **Preferences settings** option to filter content that is relevant to your workflow, business area, or features. Save the preference settings so you can view the content that you are interested in the landing page when you enable the **Preferences** button.

Similarly, you can save a news item or an upcoming event as your favorite by selecting the add to favorites () icon in the topic tile. The next time when you enable **Favorites only** button you can view all your favorite news bits and events.

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Help Center

When you are on an Impact page, to view its contextual help content, select the  icon in the Navigation pane.

Impact Squad

This section displays your subscription package along the name and role of the Impact team members you interact with, in your Impact journey.

For more information on the team and roles, see Impact Squad.

Impact Foundations

View the progress that your team is making in a linear form. Use the slider arrows to scroll across the five Impact tracker steps. Impact Foundations is a fit-for-purpose set of account-level initiatives to start you on the fast track to value and to maintain momentum via a streamlined quarterly motion.

Provides guidance for initial engagement for both new or seasoned customers and sets a baseline analysis of your current state and clear next steps to speed up your time to value, laying the groundwork for every action you take on the platform.

Work items

View the Strategic Portfolio Management or the Collaborative Work Management (CWM) work items created in impact.

Select **View work items** to view or edit Strategic Portfolio Management (SPM) or Collaborative Work Management (CWM) work items created in Impact.

For more information, see Work items in the Impact Store Application.

Stay updated

Stay updated with Case Studies that interest you. Selecting the link takes you to a page where ServiceNow customer stories are featured based on industry, products, solution, or region.

The release notes link takes you to Impact features and content that are documented for each release and are available to ServiceNow customers. For more information, see Release Notes and Upgrades.

Impact Delivery Instance

If you are in the Impact Store Application, access Quick links that take you directly to the Impact Delivery Instance, which was formerly known as Impact Digital Experience (IDE) portal.

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Select Activity Center and Benefits & Usage to know more about the features listed in this section.

Use the recommendations list

Use the recommendations full list to view the recommendations tailored for you. You can either accept or reject a recommendation based on your interest by selecting **View Details**.

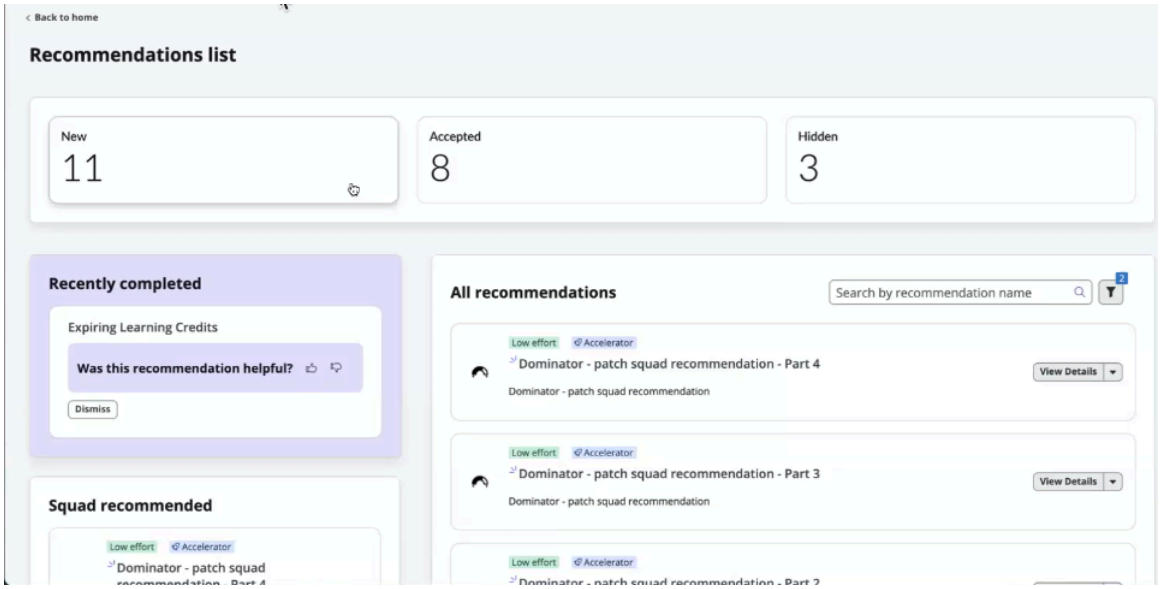
Before you begin

Role required: All Impact roles

About this task

Procedure

1. Navigate to **All** > **Impact** > **Home**.
2. Select **View full list** in the **Recommended next steps** section.



The first section on the top, below the **Recommendations list** banner, has three different tiles, namely New, Accepted, and Hidden that act as filters.

3. Select **New** to view the recommendations that have been newly published.
4. Select **Hidden** to view those recommendations that you may have rejected in the past and has been hidden from your view.
   Select the **Hidden** tile once more to remove the filter condition and unhide what was hidden previously.
5. Select **Accepted** to view those recommendations that you've accepted.

All recommendations

List of all recommendations irrespective of your category or product area. The list displays eight recommendations at a time to make it a manageable chunk and easier to navigate. You can continue to view the list by selecting the subsequent pages listed below. The list displays the latest published recommendations, followed by those that you accepted in the past, and subsequently those that you had hidden or rejected.

The accelerator recommendations already implemented by the customer appear as 'auto-accepted'.

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Recently completed

Displays recommendations that you completed recently. You can choose to like or dislike a recommendation by selecting the or

6. To provide a reason for disliking the recommendation, select and click the reason from the list.
7. Select **Dismiss** if you want to hide the **Recently completed** widget altogether, and display the **Squad recommended** widget in its stead.
8. Enter a key word or a phrase in the **Search by recommendation name** field that filters the recommendations that you are looking for from the full list.
9. To apply filter options and narrow down your search results by different criteria, select
10. Select **View Details** to view more details for a selected recommendation.

What to do next

For more information on a given recommendation, see Manage Recommendation details in Impact Store.

Outcomes based contextual learning recommendations

Outcomes based contextual learning recommendations provide data-driven recommendations for your operational outcomes. This includes tailored trainings for your outcome results.

Outcomes based contextual recommendations analyze the performance of an outcome, and its associated capabilities to recommend the most appropriate ServiceNow University courses.

These recommendations are personalized, based on the performance of the outcome and its associated capabilities. For each capability, a single learning recommendation will be generated, with multiple relevant courses included in the same record when applicable.

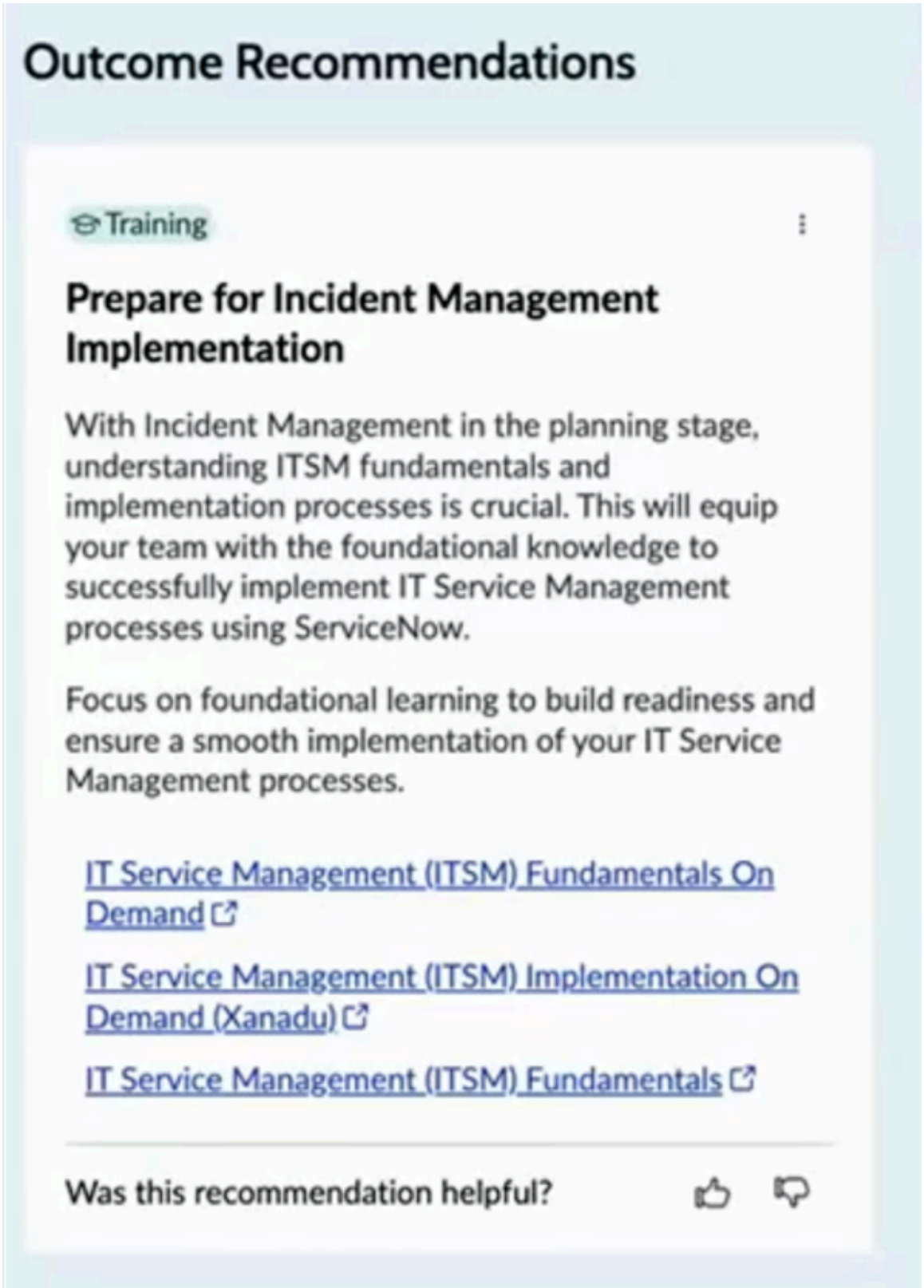
In the Zurich release, contextual learning recommendations are added for your organizational outcomes insights.

To access an outcomes insight related learning recommendation, navigate to **All** > **Impact Value Management** > **Outcomes Insights**, and then select the desired outcome.

The **Outcome Recommendations** panel appears on the **Outcome Detail** page. The selected contextual outcome recommendation summary consists of the following:

- A brief overview of the capability, its adoption status, and why the intended audience should take the learning course.
- Tailored ServiceNow University training recommendations derived from the capabilities associated with the selected outcome. Select a course to launch it in an external browser.
- Relevant training courses based on the user's adoption level of each capability.

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You can provide feedback by selecting thumbs-up or thumbs-down. You can also provide feedback about the recommendation.

You can use the ⋮ icon to do the following:

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- Copy the recommended text.
- Email the recommendation text to your team.
- Hide recommendations that aren't relevant to you.

Platform Health

Use Impact Platform Health to track Tech Key Performance Indicators (KPIs) to show how closely you're aligned to ServiceNow technical leading practices, receive recommendations for improvement, and help you monitor your instance health.

Features may vary between the Impact Store Application and the Impact Delivery Instance and are described accordingly.

Get started

Scan Engine for the Impact Store Application	HealthScan for the Impact Delivery Instance	Developer Support	Overview of Instance Observer
			
Proactive management of instance quality, compliance, and performance with real-time automation of code inspections.	A diagnostic tool that helps you understand the current health of your instance, identify potential issues and setbacks, and take quick corrective action.	Provides access to a ServiceNow Support Engineer who can assist in troubleshooting technical issues around existing platform customizations.	Track your instance health and performance in near real-time, while also providing historical insights.

Note: Starting with Impact Zurich version 6.0.8 ServiceNow Store release, Proactive Code Check is being prepared for future deprecation. It will be hidden and no longer installed on new instances but will continue to be supported. For details, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

Scan Engine for the Impact Store Application

Impact Platform Health uses the Impact Scan Engine to enable proactive management of instance quality, compliance, and performance. The Scan Engine is integrated with your Impact Store App to support platform health and adherence to leading practices.

The Scan Engine examines ServiceNow instances for findings related to active definitions that are stored in the Scan Findings table. You can view existing or resolved findings that resulted from the instance scans or summarized and detailed scan information.

Impact Scan Engine automates your code inspections in real-time so you can identify more deficiencies, improve the quality of your instances, and speed up your development efforts. You

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can also monitor and control development activities to proactively improve the quality of the system and support ongoing efforts to improve it over time.

Benefits and overview

- Enforce leading practices and code standards in real-time.
- Enhance platform performance, security, and user experience with role-based visibility and controls.
- Improve maintainability, upgrades, and problem management.
- Reduce development and maintenance costs.
- Diminish the need for manual code reviews, which are prone to human error.
- Calculate technical debt and estimate resolution time with scan output findings, progress percentiles, and estimated time remaining on code fixes.
- Empower proactive code quality monitoring and detection versus reactive corrections.
- Automate developer feedback and training through real-time, leading practice rule evaluations.

Scan definitions

Scan Engine uses a large set of definitions to correct coding and workflow findings in real time and performs scans across your entire instance to detect existing findings. This prevents developer mistakes by blocking saving a record before issues are resolved. Nightly scans identify existing findings across the entire instance.

For more information, see Scan Engine definitions.

Scan types

There are different types of scans that you can run on your instances. Depending on the type of scan, the properties required during configuration vary.

Refer to the table for information on the available scan types.

Scan Engine scan types and descriptions

Scan type	Description
Initial diagnostic scan (Scheduled scan)	• Runs based on defined Scheduled Scan options or on-demand with the Execute Now option. **Note:** The first executed instance scan is a full scan. See Run your first scan with the Scan Engine for first time setup. • View existing or resolved findings that resulted from the instance scans as well as summarized and detailed scan information.
Diagnostic scans- On-demand scan (subsequent delta scans)	• Scans for configured updates that occurred since the last scan. • Specifically analyzes application files that have been modified or `sys_update_xml` records.

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Scan Engine scan types and descriptions (continued)

Scan type	Description
	• Delta scans always look for definitions marked to return one row check per system property. • Scans for specific definitions that were identified as development issues in a previous scan. **Note:** See Configure Scan Engine properties for on-demand scan configuration options.
Update set scan	• Scans individual update sets for findings. The initial Update set scan is a full scan of all open update sets. Subsequent scans only scans records that have been modified since the last scan date (delta scan). • Child update set findings are visible from the parent update set findings summary scan record. **Note:** See Configure update set scanning properties for details.
Application scan	Scan applications to identify definition findings before publishing to the application repository. **Note:** See Initiate application scansfor details.

Configuration overview

For more information on configuring and running the Scan Engine, see Running on-demand scans, and Analytics Dashboards.

Running on-demand scans

You can initiate some scan types on-demand to run whenever they are required.

You can initiate the following scan types on-demand.

Scan type	Description
Application scans	Scan in-development applications to identify definition findings before publishing to the application repository. Application scans give insight into health scores, the number of findings, and the total impact of findings within your custom applications.
Limited definition scans	Scan your instance against a single specified definition or definition suite.
Update set scans	Scan open update sets for findings to get insights into what you are importing and exporting across your environments.

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Scan type	Description
Instance scans	Scan your ServiceNow instance for findings. These scans return the findings and store them in the Opens Findings table. **Note:** Only users with the Scan Engine Admin role can initiate instance scans.

Scheduled instance scans can be executed immediately using the **Execute Now** action, but they cannot bypass their configured schedule settings. Real-time scans run automatically during record saves and cannot be manually triggered.

Note: The Scan Engine integrates with certain development tools, such as App Engine Studio, ServiceNow Studio, and script editors. It scans business rules, script `includes`, UI scripts, client scripts, ACLs, record producers, and other script-containing records in real-time as they are saved.

Scans are initiated in different ways. They run using the Scan Engine properties you configured.

For more information, see Configure Scan Engine properties and Configure definition properties.

Initiate application scans

You can scan applications to identify definition findings before publishing to the application repository. Application scans give insight into health scores, the number of findings, and the total impact of findings within your custom applications.

Before you begin

Role required:

- Scan Engine users can initiate scans.
- System Admins have read/write access to the custom application table.

Procedure

1. In the navigator, enter `sys_app.list#`, and then press `Enter` to open the Custom Applications table.
2. Select the record of the application you want to scan.
3. Select **Scan This Application**.

Initiate limited definition scans

You can scan individual definitions or suites of definitions on-demand.

Before you begin

Limited definition scans run faster than full instance scans because they only execute specific definitions rather than all active definitions. They are useful for quickly verifying fixes, testing new definitions, or focusing on specific areas of concern.

Role required:

- Scan Engine users can initiate scans.
- System Admins have read/write access to the custom application table.

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Procedure

1. Navigate to **All** > **Impact** > **Platform Health**, and then select one of the following:
   - **Definitions**
   - **Definition Suites**
2. Select the definitions or definition suites that you want to scan.
3. Select one of the following:
   - On the definition record, select the **Actions** menu, then select **Scan Instance for this Definition**.

     This initiates an on-demand scan that applies only this definition across your entire instance.
   - On the suite record, select **Scan this Suite** to initiate the scan.

     Definition suites group related definitions. Scanning a suite runs all definitions in that suite.

Initiate update set scans

You can scan open update sets for findings to get insights into what you are importing and exporting across your environments.

Before you begin

Role required:

- Scan Engine users can initiate scans.
- System Admins have read/write access to the custom application table.

Note: Local update set scans are performed in batches, which means all update sets (parent or child) in the grouping will be scanned. Retrieved update set scans are scanned individually, not in batches.

Procedure

1. Navigate to **All** > **System Update Sets**, and then select one of the following:
   - **Local Update Sets**
   - **Retrieved Update Sets**
2. Select the name of the update set you want to scan.
3. In **Related Links**, select **Update Set Scan**.

Initiate instance scans

You can scan your ServiceNow instance for findings.

Before you begin

Role required: Scan Engine Admin

Procedure

1. Navigate to **All** > **Impact** > **Platform Health** > **Scheduled Scan**.
2. To run a full scan, set `force_full_scan` to **True**.
   By default, `force_full_scan` is set to **False**, meaning it will only run delta scans.
3. Select **Execute Now**.

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4. To review the scan as it runs or after it is completed, open the **Scan Status** module.
   See View scan results for Scan Engine#.

View scan results for Scan Engine

You can view scans in real-time as they run, or after they're completed.

Before you begin

- Fully configure the general and additional Scan Engine properties.

  See Configure Scan Engine properties and Configure definition properties.

- Role required: Scan Engine User (`sn_se.scan_engine_user`), Scan Engine Admin ((`sn_se.scan_engine_admin`) or Impact specific roles (Impact App Admin, Impact Platform Owner, Impact Development Team Lead, Impact Executive, Impact Developer).

Procedure

1. To view a completed scan, navigate to **ALL** > **Impact** > **Platform Health** > **Summary Scans** (`sn_se_summary_scan` table), and then select the scan number to view.
2. To view a scan that is currently running, navigate to **ALL** > **Impact** > **Platform Health** > **Scan Status**(`sn_se_scan_status` table).
   The following information about the scan displays.

Option	Description
Scan number	ID number assigned to the scan
Type of scan	Type of scan being run
Status	Status of the scan (active, finished, or encoun tered errors)
Scan duration	How long the scan has been running
Estimated time remaining	How much time is left until the scan is com pleted
Percent complete	Percentage of how close the scan is to com pleting

   The current step that the scan is on displays. The steps of a scan are:

   a. Getting ready

   b. Scanning

   c. Reconcile findings

   d. Complete

3. **Optional:** On the **Actions** menu, select any of the following as needed.

Option	Description
View Summary Scan Record	Open the summary results for the scan.
Cancel this scan	Cancel the scan before it completes.
Reload page	Refresh the page.

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The following tabs display scan information.

Option	Description
Batch	The batches currently being scanned. Each batch shows its own progress bar. (Optional) To skip a batch, select the option to the right of the batch to skip.
Status history	Status messages that displayed during the scan.
Message	System messages and progress updates from the scan. **Note:** To view the actual findings, navigate to **ALL > Impact > Platform Health > Open Findings**.

What to do next

From the summary scan record, use the **Findings** related list to view all findings discovered during this scan.

View and implement proposed fixes for Scan Engine

Some definitions include proposed fixes for resolving them, which you can initiate automatically.

Before you begin

Role required: Admin or scan engine user.

Note: Proposed fixes are only available for instance scans findings, not for real-time monitoring findings.

A proposed fix is a recommended remediation option provided for certain definition findings. It includes a specific, predefined solution that developers can apply to resolve issues quickly and accurately. While the fix is not automated—manual intervention is still required—having a clear, guided resolution significantly reduces troubleshooting time and ensures consistency in how issues are addressed.

Proposed fixes are defined in the `autofix_script` field of the scan definition. The script executes against the finding's target record when **Apply Proposed Fix** is selected.

Procedure

1. Navigate to **All** > **Impact** > **Platform Health** > **Proposed Fix Findings**.
   All findings with available proposed fixes display.
2. Open a record to view the definition finding details.
3. To implement a fix, select **Apply Proposed Fix** and close the definition finding.

What to do next

After applying the fix, the system executes the autofix script and marks the finding as resolved. Review the finding record and the target record to verify the fix was applied successfully. Some fixes may require additional manual validation.

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Create policies for Scan Engine

Policies let you determine how specific definition findings appear on analytics dashboards; you can ignore them completely or place them in a prioritized view.

Before you begin

Role required: admin

You can choose to create policies that label these definition findings as:

- **Acceptable as is**: Findings remain in the **Open Findings** table but are excluded from dashboard metrics, health score calculations, and prioritization views. They are not automatically closed.
- **Prioritize**: Findings will appear in the **Prioritized findings** module on analytics dashboards.

Note: Policies match findings based on the **Definition** field. When creating a policy from a finding, the policy automatically references that definition and will apply to all future findings from the same definition.

Procedure

1. Navigate to **All** > **Impact** > **Platform Health** > **Open Findings**.
2. To open the record of a finding that you want to assign a policy to, select its short description.
3. In the **Related Links** section, select **Create a policy for this finding**.
4. Set the following fields to configure the policy.

Option	Description
Number	Auto-generated ID for the policy.
Active	Enable the policy to display in the **Finding Policies** page (**ALL > Impact > Platform Health > Finding Policies**).
Status	Select one of the following: ○ None ○ Acceptable as is ○ Prioritize **Note:** **None** means the policy is de fined but not currently affecting findings. Use **Acceptable as is** to exclude find ings from metrics, or **Prioritize** to high light them in dashboards. Inactive poli cies do not process at all.
Order	Policies are evaluated in order (lowest to high est). The first policy that matches a finding is applied; subsequent policies are not evaluat ed for that finding. Lower order values have higher priority.
Reason for policy	Description of why the policy was created.

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5. Select **Submit**.
   When a policy is active, findings matching its criteria display its name in their **Policy** field. View all findings affected by a policy through the policy record's **Findings** related list, or navigate to **ALL > Impact > Platform Health > Finding Policies** to manage all policies.

Create user stories and tasks for Scan Engine

You can generate user stories from open or resolved findings to facilitate the resolution of technical debt.

Before you begin

Role required: admin

Note: The Scan Engine integrates with Agile project management tools, including Jira, Azure DevOps, and ServiceNow Agile development. For information on configuring integration properties to automatically create work items from findings, refer to User story integration.

Procedure

1. Navigate to **ALL** > **Impact** > **Platform Health**, and then select one of the following:
   - **Open Findings**
   - **Resolved Findings**

   Create tasks from Open Findings to track remediation work. Create tasks from Resolved Findings when you've already fixed issues, but want to document the work in your project management system retroactively.
2. To open the record of the finding you want to generate a story or task from, select its Short Description.
3. On the finding record, select **Create Task** in the form header or from the **Related Links**.
   The dialog displays integration-specific fields. For Jira, these are **Organization**, **Project**, and **Issue Type**. For Azure DevOps, they are **Organization**, **Project**, and **Work Item Type**. These values are populated from your integration configuration.
4. Select **Submit**.
   A work item is created in the configured destination, either Jira, Azure DevOps, or ServiceNow Agile Development (stories/tasks tables). A reference link is stored on the finding record.
5. To create stories or tasks from multiple findings, in the Open Findings or Resolved Findings window, select the findings that you want to create a story or task for, and then select **Create Task**.
   Ensure that all the findings you select are appropriate for the same project. The system processes bulk requests asynchronously for large selections.

Trouble?

If user story or task creation fails, check and ensure the following:

- Your integration credentials are valid
- The target project exists and is accessible
- All required fields are configured.

You can view your created tasks through the **External References** related list on the finding record.

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Real-time prevention monitoring for Scan Engine

Real-Time Prevention is a Scan Engine feature that actively monitors records as they are created or modified by developers and administrators, displaying real-time finding messages when saving records in any instance where the Scan Engine is installed and activated.

How it works:

- **Immediate Detection:** Identifies potential violations in scripts, includes, and other fields at the moment of edit.
- **On-Screen Alerts:** Displays findings in real-time with severity levels
- **Guided Resolution:** Provides details, such as line numbers, impact levels, and steps to resolve found issues.
- **Governance:** Supports exception workflows and links to supporting documentation for compliance.

Note: Real-Time Prevention must be enabled in the Scan Engine properties page for this feature to function. For more information, refer to Configure Scan Engine properties.

Findings identified by real-time monitoring can have the following levels.

Level	Description
Review	• In real-time mode, displays an informational message without blocking saves or creating finding records. • In scan mode, Review level findings are recorded in the findings table for tracking purposes.
Suggest	Prompts users to check for a better solution if one is available.
Recommend	• Prevents users from saving the record unless they resolve the issue or provide an exception reason. • For more information, refer to Submit exceptions for the Scan Engine findings.
Act	• Prevents users from saving the record until they fix the code to meet the definition's requirements. • No exception reason option is available. • An override requires admin-level rights or the disabling of the definition.

Note: Depending on the level of the definition, users may be required to fix a finding before saving a record.

Using real-time prevention monitoring

When working with application or configuration file types, if the real-time scanning functionality is configured and active, the Scan Engine displays information for the findings.

Finding levels of Review and Suggest are shown in blue, while Recommend and Act are shown in red. These information windows can contain the following fields, depending on their severity.

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Field	Description
Finding level	The severity level of the finding, as well as a brief description of the finding.
Details	Generally, the line number the finding occurred on.
Steps to resolve issue	Some suggested steps the developer can follow to resolve the finding.
Exception reason required	If the finding is at the Recommend level, this field reminds developers they can submit an exception for the issue if they believe it is not a finding.
Supporting documentation	• If the definition this finding applies to contains a **Supporting Documentation** link, it appears here as a hyperlink that opens in a new browser tab. • This information can be linked to documentation, knowledge base articles, FAQs, and more.
Impact	• Lists the finding's impact level and **Impact to Instance** for the associated definition. • The impact to instance is a number between 1 and 10, where 10 is the most impactful.

Using the information provided, you can do one of the following:

- Correct the issue. If the issue is corrected, the Scan Engine will not return a new finding notice.
- In the case of a Recommend level finding, submit an exception, then **Update** the page. See Submit exceptions for the Scan Engine findings.

Real-time messaging enforcement can be disabled with the Scan Engine properties page. By disabling enforcement, users will see the messaging but will not be required to make corrections for Act and Recommend findings.

In addition, visibility of real-time messaging for certain users can also be configured with the Scan Engine properties page. You can limit the users that will receive real-time messaging to a specific group if necessary.

For more information, refer to Configure Scan Engine properties.

Submit exceptions for the Scan Engine findings

For Recommend level findings, developers can submit exception requests if they feel the issue should not be considered a finding.

Before you begin

Role required: Scan Engine Admin (sn_se.scan_engine_admin).

Generally, exceptions require approval from a system administrator. However, certain settings configured by a system administrator may determine if the exception is automatically approved or rejected.

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Procedure

1. From the finding (*sn_se_finding*) record, locate the **Scanned Record** field.
2. Select **Scan Engine Exceptions**.
   The *sn_se_finding* record must be extending the *sys_metadata table* in order for the Scan Engine Exceptions button to be available.
   This displays all applicable script issues identified by the Scan Engine that also qualify for an exception.
3. Enter the reason in the **Exception Reason** field for why an exception should be made for this finding.
4. Select **Request Approval** to have the exception reviewed by a system administrator.
   If enabled, the exception state is *Requested*. If not, the state is *Not Yet Requested*.
5. Select **OK** to submit the exception request.
   Once the exception request is saved, the applicable warning messages changes color as blue.

What to do next

For more information on configuring exception properties, refer to Configure exception reason properties.

Work with Scan Engine findings

You can view and work with open findings resulting from scans.

Before you begin

Role required: Scan Engine Admin (sn_se.scan_engine_admin).

Enforcement levels and risk impact

Every finding in your instance is evaluated along two critical dimensions to help your team prioritize remediation efforts and maintain compliance standards. Findings are evaluated with a Level of findings and impact to instance ratings.

- **Level of Findings**: Represents the enforcement behavior which determines how strictly the system reacts to the issue. Such as blocking an action, issuing a warning, or providing informational guidance.
- **Impact to Instance**: Represents the business and technical risk indicating how harmful the issue could be if left unresolved.

Examples

These two metrics work together to help teams balance enforcement and risk prioritization, ensuring critical issues are addressed first while maintaining development velocity.

- ACT level finding with impact to instance of 9: Critical and must be fixed immediately before proceeding. No exceptions.
- SUGGEST level with impact to instance of 8: High-risk but does not block development. Should still be prioritized for remediation.

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Scan Engine finding levels and enforcement behavior

Level of finding	Impact to instance (typical)	Severity description	Enforcement behavior / recommended action
ACT	8–10	Critical issues that can break functionality, cause security vulnerabilities, or block upgrades.	• The record can not be saved until the code is fixed to meet the requirements in the definition. • No exception reason option is available. • An override requires admin-level rights or the disabling of the definition.
RECOMMEND	5–7	High severity issues that may degrade performance, stability, or security. Exceptions with governance are allowed.	• The record can not be saved until the issue is resolved or and exception reason is provided formal approval. • For more information, refer to Submit exceptions for the Scan Engine findings.
SUGGEST	2–4	Moderate issues, often related to optimization, maintainability, or best practices.	• Address during future development cycle • Does not block progress • Prompts to check for a better solution, if one is available.
REVIEW	0-1	Low impact, informational findings with minimal impact (e.g., unused fields or minor UI inconsistencies).	Monitor and optionally fix during future development cycles.

Procedure

1. Navigate to **ALL** > **Impact** > **Platform Health** > **Open Findings**.
2. Open the record you want to work with by selecting its **Short Description**.
   The finding record displays the following fields.

Field	Description
Definition	Displays the scan definition that detected this finding. Select the definition name to view full definition details. See Scan Engine definitions for more information.
Level of Finding	Measures the potential severity of the finding on the overall instance on a scale of 0-10.
Applies to	A reference to the specific record flagged by the scan (for example, a business rule, script

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Field	Description
	include, or ACL record). Select it to open the record directly and review or fix the issue.
Short Description	Brief description of the finding
Finding Details	What was detected and why

The following fields appear on the **Resolution** tab.

Field	Description
Estimated Time to Resolve Issue	Time it will take to resolve the finding
Impact to Instance	○ Finding's impact level if there is an as signed **Impact to Instance** for the associat ed definition ○ Ranges from 1 (minimal) to 10 (critical), as defined in the scan definition. This value helps prioritize findings by business im pact. Higher values indicate findings that should be addressed first.
Steps to Resolve	Suggested method for resolving the finding
Supporting documentation	Link to supporting documentation that may help in resolving the finding

3. Apply the recommended changes in the record that triggered the finding.
4. **Optional:** Submit an exception for review to request to bypass a fix for the finding. For more information, refer to Submit exceptions for the Scan Engine findings. The finding will be marked as resolved once the next scan validates the changes.

Scan Engine definitions

The Scan Engine uses a large set of definitions to correct coding and workflow findings in real time and perform scans across your entire instance to detect existing findings.

Pre-defined definitions

There are various types of definitions available as a baseline in the Impact Scan Engine.

Scan Engine definition categories

Category	Description
Manageability	Measures the extent to which ServiceNow instances, applications, or infrastructure can be effectively monitored, configured, and maintained.
Performance	Measures the efficiency of a ServiceNow instance, encompassing aspects such as speed, responsiveness, resource utilization, and overall dependability
Security	Measures implementation of protocols across a ServiceNow instance to prevent unauthorized access, data breaches, cyber attacks, and potential vulnerabilities

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Scan Engine definition categories (continued)

Category	Description
Upgradeability	Assesses the ease of enhancing a ServiceNow instance or application with new features, improvements, security patches, or compatibility adjustments
User Experience	Evaluates the quality of user interactions with applications. Considers the ease of use, efficiency, design, responsiveness, accessibility, and its emotional and functional impact.

For more information, see Configure Scan Engine properties.

Custom definitions

Users can create their own custom definitions. For more information, see Create custom Scan Engine definitions.

Note: The number of custom definitions that is permitted varies based on your Impact package. For more information, see Impact packages.

Scan Engine definition suites

Definition suites are groupings of similar definitions that allow administrators to target specific areas or functions of code during scans. This is useful as it allows scanning of the entire instance or all definitions. Admins can focus on a suite that represents a logical category (for example, JavaScript naming conventions, ITOM workflows, security hardening, and so on). This improves efficiency and precision in code quality checks.

By default, the following suites are available:

- Scan Engine
- JavaScript Naming Conventions
- Scoped Application
- ITOM
- Workflow Engine
- Security and Instance Hardening
- IL4 (Impact Level 4)
- HR Scoped Applications
- Artificial Intelligence Readiness

Note: Only users with the `sn_se.scan_engine_admin_role` role can modify existing suites and their relationship with their definitions.

For more information, see Create Scan Engine definition suites.

View and modify Scan Engine definitions

You can modify an existing definition to further customize and refine its scanning criteria.

Before you begin

Role required: Scan Engine admin (`sn_se.scan_engine_admin`).

While only Scan Engine admins can modify definitions, any user with the Scan Engine user role can view them.

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Procedure

1. Navigate to **ALL** > **Impact** > **Platform Health** > **Definitions**.
2. Select a definition number to open its details.
3. To modify a base system definition's properties, select **Override Definition**.
   When a definition is overridden, the base system definition will no longer be used in any scan (real-time, scheduled, update set, application, or on demand). All fields in the overridden definition become editable.
4. Modify the required and optional fields.
   - Refer to Create custom Scan Engine definitions for details.
   - In addition to those fields, when viewing an existing definition, you will also see **Override**. To modify a base system definition, use the override field to disable it and create a new custom definition.

   The definition is overridden to create the current definition.

   This field is only visible if a base definition has been overridden using **Override Definition**. Deleting an overridden definition re-enables the base system definition.

   Note: Overridden definitions are considered custom definitions. As a result, they are included in the count of 10 active custom definitions limit for Guided customers.

5. Select **Update**.
   Selecting Delete will delete the override, meaning the base system definition will be used going forward.

   Related lists appear at the bottom of the definition screen.

Option	Description
Applicable Tables	Displays all tables scanned by the definition, as well as the conditions table records must match in order to be scanned. To add a table to the list: **a.** Select **New**. **b.** In the New Applicable Table form, define the potential tables to scan: ▪ **Definition**: The definition that applies to this record. For the table defined in this record, if the condition matches, the defi nition in this field will record a finding. ▪ **Table**: Specific table that the definition runs against. ▪ **Configuration tables**: Definitions run against tables that extend the applica tion file (sys_metadata). Scans of these tables can be monitored in real time. ▪ **Non-configuration tables**: Definitions run against all other tables. Scans of these tables cannot be monitored in re

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Option	Description
	al time and will only be seen in the re sults of an update set, application, or other on-demand scan. ▪ **Global Scope**: Some global tables have a type of restricted access, called Caller Restriction. Special handling is required to access these tables from the Scan En gine scope. See [illegible] for more information. ▪ **Conditions**: Defines the conditions that table records must meet in order to be scanned.
Findings For This Definition	Displays any findings, as established by the definition, found during on-demand or sched uled scans.
Resolved Finding Histories	Shows findings that were resolved for this def inition.
Scan Engine Suites	Displays all suites assigned to the definition, which allows for scanning entire suites of def initions. Suites are also used in reporting with in the Analytics Dashboard. For more infor mation, see Create Scan Engine definition suites. To assign suites to a definition: **a.** Select **Edit**. **b.** In the **Edit Members** form, assign one or more suites to a definition: ▪ **Collection**: List of available suites that can be assigned to a definition. ▪ **Scan Engine Suites List**: Assigned suites for the current definition.

Create custom Scan Engine definitions

The Scan Engine contains preexisting base system definitions. However, if your organization has specific scanning needs not met by these definitions, you can create your own.

Before you begin

Role required: Scan Engine Admin (`sn_se.scan_engine_admin`).

Note: Guided customers can only have 10 active custom definitions in a single instance. Definitions above that number will be disabled anytime a scan is executed. Total customers (as well as Guided customers with the Platform Health add-on) may have unlimited active custom definitions in a single instance.

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Procedure

1. Navigate to **ALL** > **Impact** > **Platform Health** > **Definitions**.
2. Select **New**.
3. Fill in the following fields as needed.

Field/Selection	Description
Number	The unique identifier of the definition. This number is generated automatically. **Note:** Your unique company code will be prefixed to the definition number. You can find your company code by navigating to the `sys_properties` table, then searching for `glide.appcreator.company.code` property.
Active	Select to have the Scan Engine evaluate records to see if there are any findings (is sues) during a scan.
Level of Finding	Select the severity level of the finding for the definition that displays when real-time moni toring is active: ○ **Act**: Prevents users from modifying the record until the definition's conditions are met. ○ **Recommend**: Prevents users from modify ing the record unless they provide an ex ception reason for why the definition was not followed or until the definition's condi tions are met. ○ **Suggest**: Prompts users to check if there is a better solution available. ○ **Review**: Calls out less serious items for re view. This does not contribute to technical debt.
Category	The category of the definition: ○ **Upgradeability**: Assesses the ease of en hancing a ServiceNow instance or applica tion with new features, improvements, secu rity patches, or compatibility adjustments. ○ **Manageability**: Measures the extent to which ServiceNow instances, applications, or infrastructure can be effectively moni tored, configured, and maintained. ○ **Performance**: Measures the efficiency of a ServiceNow instance, encompassing as pects such as speed, responsiveness, re source utilization, and overall dependabili ty.

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Field/Selection	Description
	○ **Security**: Measures implementation of pro tocols across a ServiceNow instance to pre vent unauthorized access, data breaches, cyber-attacks, and potential vulnerabilities. ○ **User Experience**: Evaluates the quality of user interactions with applications, con sidering ease of use, efficiency, design, re sponsiveness, accessibility, and its emo tional and functional impact.
Short Description (Mandatory)	A short description of the definition.
Reason For Definition	Why the definition was created.
Supporting Documentation	A link to documentation that further explains the reason for the definition. The link displays as part of the real-time message.

4. On the **Configuration** tab, adjust the values of the following fields as desired to configure how the definition operates and identifies findings within the instance.

Field/Setting	Description
Evaluate Definition For	Dictates the scope of records that are scanned in real-time: ○ **All Matching Records**: Scans all applicable records in real-time. ○ **New Records Only**: Scans only new, applic able records in real-time.
SN Instance To Run On	Sets the SN instance that the definition will ap ply to. ○ Run on all sub-production instances ○ Run on specified instances ○ Run on production instance(s) only **Note:** **Run on Specified Instances** acti vates the **Specific SN Instances to Run On** field.
Specific SN Instances to Run On	○ Sets which specific ServiceNow instances the definition applies to. ○ For this setting to display, the follow must be true: ▪ **Enable Instance Specific Definitions** must be enabled in the Scan Engine prop erties. ▪ The My SN Instances table must contain at least one instance.

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Field/Setting	Description
	Note: Only instances defined in the My SN Instances table can be selected here.
Type of Rule (Mandatory)	Sets the definition's rule type: ○ Fails if script includes text ○ Fails if script excludes text ○ Fail if XML includes text ○ Fail if XML excludes text ○ Fail if conditions match ○ Custom
Scan Finding Limit	○ The maximum number of findings that can be generated for each definition during a scan. ○ The limit is applied per applicable table — for example, if the limit is set to 100, a max imum of 100 findings will be generated for each applicable table. ○ Prevents excessive or redundant findings and optimizes scan performance.
Propose Fix	○ Allows a definition to be defined such that it enables the ability for it to automatically apply recommended changes to objects in ServiceNow. ○ When selected, the **Proposed Fix Script** field displays. **Note:** To use this functionality, you must either purchase the Impact Total package or the Platform Health add-on.
Propose Fix Script	○ Provides a script field for creating a custom function which is used to show users an au to-corrected version of the record they are viewing. ○ This field is only visible if **Propose Fix** is en abled.
Search Type (Mandatory)	○ **Regex**: Search by regular expression. ○ **Text**: Search for text. ○ **Custom**: A custom search type using JavaScript. ○ This field is only visible if **Type of Rule** is one of the following:

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Field/Setting	Description
	▪ Fails if script includes text ▪ Fails if script excludes text ▪ Fail if XML includes text ▪ Fail if XML excludes text
Custom Rule Variable	○ Enables the Parameter 1 value string entry field. ○ This field is only visible if **Type of Rule** is set to **Custom**.
Parameter 1 Value	Set a default value here if you want to allow users to be able to change the value of a para meter without modifying a custom script. **Note:** This field is only visible if **Cus tom Rule** is **Enabled**.
Parameter 1 Description	A description of what the Parameter 1 Value is used for. **Note:** This field is only visible if **Type of Rule** is set to **Custom**.
Delta Scans Not Applicable	This definition will always scan as a full scan, not a delta scan, for all scan types. This means it will scan all records for findings, not just records updated since the previous scan.
Return One Finding For The Entire Table	○ If the definition doesn't apply to specific records within the table, but rather the en tire table, the Scan Engine returns one find ing record for the table instead of a finding for each record. ○ When possible, the scanned table and scanned record are populated in the find ing. If this isn't possible, the scanned record value will be empty. **Note:** If enabled, this definition will not scan in real-time.
Search Pattern	Lets users enter a regular expression to search for findings in Scripts and XML type fields. This field is only available if **Type of Rule** is set to one of the following: ○ Fail if script includes text ○ Fail if script excludes text

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Field/Setting	Description
	○ Fail if XML includes text ○ Fail if XML excludes text In addition, **Search Type** must be set to **Regex**.
Search Function	Lets users enter a custom function to search for findings in Scripts and XML type fields. This field is only available if **Type of Rule** is set to one of the following: ○ Fail if script includes text ○ Fail if script excludes text ○ Fail if XML includes text ○ Fail if XML excludes text. In addition, **Search Type** must be set to **Cus tom**.
Search Text	Enables a field for users to search for text in scripts and XML fields. Enter one or more comma-separated text values. This field is only available if **Type of Rule** is set to one of the following: ○ Fail if script includes text ○ Fail if script excludes text ○ Fail if XML includes text ○ Fail if XML excludes text In addition, **Search Type** must be set to **Text (comma separated)**.
Custom Function (Mandatory)	○ Provides a script field to create a custom function for identifying findings. ○ This field is only visible if **Type of Rule** is set to **Custom**.

5. On the **Impact** tab, adjust the values in the following fields as desired to configure the impact level for findings relating to this definition.

Option	Description
Impact to Instance (Mandatory)	○ Sets a level of impact for the finding within its level of finding. For example, different Act findings can have different impact lev

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Option	Description
	els assigned to them. It provides an extra layer of priority for individual definitions. ○ Impacts can be set from 1-10, where 1 is the lowest impact and 10 is the highest.
Business Impact	A description of how a finding for the defini tion would affect the instance in a business setting.

6. On the **Resolution** tab, adjust the values in the following fields to change how to resolve findings relating to this definition, as well as the estimated time it will take to do so.

Option	Description
Estimated Time to Resolve Issue	The estimated time for a single developer to resolve the definition finding in days, hours, minutes, and seconds.
Steps To Resolve	A description of the steps for resolving the finding related to this definition. This descrip tion is displayed on real-time messages.

7. Select **Save** in the Additional Actions drop down menu to save the new definition, then configure the Applicable Tables.

Create Scan Engine definition suites

Follow these steps to create Scan Engine definition suites.

Before you begin

Role required: Scan Engine admin (`sn_se.scan_engine_admin_role` role)

Procedure

1. Navigate to **ALL** > **Impact** > **Platform Health** > **Definition Suites.**.
2. Select **New**.
3. Fill in the fields as needed.

Option	Description
Number	The unique identifier of the definition suite. This number is generated automatically.
Active	Makes the definition suite active and useable.
Short Description	Brief description of the definition suite.
Description	Detailed description of why the suite was cre ated

View and modify Scan Engine definition suites

You can modify a definition suite to further customize and refine its scanning criteria.

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Before you begin

Role required: Scan Engine admin (`sn_se.scan_engine_admin`).

While only Scan Engine admins can modify definitions, any user with the Scan Engine user role can view them.

Procedure

1. Navigate to **ALL** > **Impact** > **Platform Health** > **Definition Suites**.
2. Select a suite number to open its details and modify its properties.
   You can edit the same fields you configured in Create Scan Engine definition suites.

   Related lists appear at the bottom of the screen.

List	Definition
Scan Engine Definitions	Displays the definitions attached to this suite. To add a definition to the suite: **a.** Select **Edit**. **b.** Use the filter to sort the **Collection** list. **c.** To add a definition to the collection, select it, and then select the right arrow to move it to the Workflow Engine field. You can add multiple definitions. You can move definitions out of the suite using the left arrow. **d.** Select **Save**.
Relevant Findings	Displays findings found during on-demand or instance scans as defined by the definitions in the suite.

Configure Scan Engine properties

Configure the primary scanning capabilities and configuration options for scheduled, on-demand and real-time scans.

Before you begin

Run your first scan with the Scan Engine to run your initial scan.

Role required: Scan Engine admin and Impact admin

Procedure

1. Navigate to **ALL** > **Impact** > **Configuration** > **Scan Engine Properties**.
2. Select **Activate Scan Engine** to ensure the Scan Engine runs against your instance.
3. Select **Run Scheduled Scan** to schedule nightly, weekly, or monthly scans, and then configure the following options.

Schedule option	Description
Run	Daily, Weekly, or Monthly scheduled scan run times.

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Schedule option	Description
Day of Week	The day of the week on which to run weekly scans.
Day of Month	The day of the month on which to run monthly scans.
Time Zone	Your time zone.
Time	○ Field type = `glide_utc_time` ○ The time the scan should begin in 24-hour format (HH:MM:SS).

4. Choose what to scan and how to track the findings.

Setting	Description
Scan Non-Configuration Records	Includes non-configuration tables (which do not extend `sys_metadata`) in the scan.
Scan Read-Only Records	○ Includes read-only records in the scan. ○ `scan_read_only`: Default value is `true`. ○ Read-only records are scanned by default.
Track Resolved Findings	Logs any resolved findings as part of the scan and includes them in the View Resolved Findings module of the dashboard.
Scan Findings Limit	○ Field name: `scan_findings_limit` ○ The maximum number of findings that can be generated for each definition during a scan. ○ The limit is applied per applicable table. For example, if the limit is set to 100, a maximum of 100 findings will be generated for each applicable table. ○ Prevents excessive or redundant findings and optimizes scan performance.
Custom Workday	By default, technical debt is calculated as a 24-hour day, which allows you to specify a number of hours for a workday. For example, developer workdays can be set to 8 hours instead of 24. **Note:** This is used to calculate various metrics that appear in the Analytics Dashboards.
Average hourly rate of development	This figure calculates the cost of technical debt that displays on your dashboard by multiplying it by the estimated time to resolve each finding in the system.

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Setting	Description
Batch Record Size	○ Field name: `full_scan_batch_size` ○ Default value = 50,000 records. ○ Specifies the maximum number of records allowed to be analyzed in a single batch scan for an applicable table. ○ This value does not limit the total number of records that can be scanned. When a ta ble's record count exceeds this threshold (50,000), the table is assigned to its own dedicated batch during scan processing to optimize performance. ○ This value determines when an applicable table warrants its own batch during scans. **Note:** This is a read-only system property that cannot be modified through the UI.
Scheduled Scan Logging Frequency	○ Default value = `false` ○ Leave blank to disable verbose logging. When set, logs scan progress after process ing the specified number of records
Days of scan finding histories to keep	○ Field name: `keep_days_finding_history` ○ Sets the retention period for finding history records. **Note:** This controls how long histori cal scan data is retained, not the find ings themselves.The default value is 30 days.
Include review findings in technical debt	Displays findings on the dashboard where the level of the rule is equal to Review.
Enable instance specific definitions	○ Field name: `instance_specific_definitions` ○ Select to restrict scan definitions to run on ly on designated instances. ○ When disabled, all active definitions run on all instances. ○ When enabled without matching instances, only 'All Instances' definitions execute. **Note:** Configuration option that con trols whether definitions run only on specified instances.

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Setting	Description
Scan Out Of Box Records	○ Field name: `scan_out_of_box_records` ○ Default value = `false` ○ Includes ServiceNow base system records in full scans (scheduled, on-demand, and limited definition scans). ○ Creates finding records for base system records. **Note:** This setting does not apply to real-time scans or update set scans, where base system records are al ways scanned.
Scan Non-Configuration Records	○ Field name: `scan_non_configuration_records` ○ Default value = `true` ○ When enabled, includes non-configuration tables (tables that do not extend sys_meta data) in full scans.

Configure scanning properties per persona

You can view and configure a variety of information, formatted into lists, that the Scan Engine uses to permit users, team leads, and admins to access content.

TeamDev scanning properties

You can specify whether to scan TeamDev code pushes that are pending a review. You can also specify the requirements they must meet to be automatically approved or rejected.

If you use TeamDev as a method for pushing code, the Scan Engine can be used to scan code pushes that are pending a code review. You scan these pushes for findings, as well as define the conditions to automatically approve or reject code reviews.

Note: Code reviews must be enabled for TeamDev scanning to work properly. Additionally, admins must perform a one-time API configuration to enable TeamDev scanning. For more information, refer to Register your instance.

Properties include:

- **Automatically scan pushes pending Code Review** (`auto_scan_team_dev_pushes`)
- **Automatically approve or reject pushes** (`team_dev_auto_approve`)
- **Approval condition** (`team_dev_approval_condition`)

  Note: The default approval condition is `total_errors=0`. This means TeamDev code pushes with zero errors will be auto-approved.

- **Code reviewer user** (`team_dev_user`)

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Users and administrators

This is a list that contains a record for each role given out in the system that is related to the Scan Engine.

Team leads

The team and team leads defined here are able to view the Team Lead information in the Analytics Dashboard.

1. To define teams and team leads, select **New**.
2. Configure the following fields and settings.

Field/Setting	Description
Active	Determines if the Scan Engine Team Lead record is active.
Team Name	Specify the name of the team as it will appear in reports within the Scan Engine.
Team Lead	Identifies the team lead or manager of this group.
My Team - Users	Specify the user or list of users that are part of this team.
My Team - Groups	Specify the group or list of groups that are part of this team.

Set requirements for automatic approval or rejection

To automatically scan TeamDev code pushes when they are committed, configure the **Automatically Scan Pushes Pending Code Review** option:

1. Enable **Automatically approve or reject pushes**.
2. Add a Code reviewer user for additional tracking.

   You can see the table that will be used for checking scan results.
3. Use the condition builder to specify the rules for how a code push is approved.

   If it does not meet these rules, it will be rejected.

   Note: By default, one condition is already set, which says that the total number of errors found must be zero.

You can add and configure additional filter conditions by selecting **Add filter condition**. You can also add and configure OR clauses by selecting **Add OR clause**.

Note: You can append filter conditions and OR clauses to existing conditions by selecting the **AND** or **OR** options next to them.

Configure Scan Engine instance integration settings

You can view and configure a variety of information, formatted into lists, that the Scan Engine uses to implement its various scanning types.

Role required: Scan Engine admin and Impact admin.

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System properties

These are the properties specifically created by the Scan Engine application upon installation. Modification of these properties is performed using standard procedures in ServiceNow.

My SN Instances

Each record indicates an instance connected to the current instance through API integrations.

Note: You must configure this to take advantage of exception processing, definition syncing, and user story tracking in Production.

1. To add an instance to the list, select **New**.
2. Configure the following fields and settings.

Field/Setting	Description
Instance Name	The name of the instance.
Instance URL	The URL of the instance.
Environment	The instance environment: ○ Development ○ Production ○ Test **Important:** Only one instance can be listed as Production. Otherwise, the integration will fail.
Validated	○ Indicates whether the instance has been successfully validated using the UI Action provided in the configuration interface. ○ You can use the **Validate Connection** action available on the instance configuration form to attempt a live connection to the target instance using the defined credentials and connection parameters. If successful, the instance is flagged as Validated = true.
Connection Status	○ Represents the current state of connectivity between local and remote instances. ○ This field is automatically updated based on the results of the validation process. It reflects the outcome of the live connection test and cannot be edited. ○ The following values are supported: ▪ Approvals not configured in production ▪ Authentication method is not configured ▪ Connection Valid ▪ Connection Invalid

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Field/Setting	Description
	▪ API User is missing role ▪ User not setup on target instance These values help diagnose integration issues, as well as help with corrective actions.
Authentication Type	The instance's authentication type: ○ Basic ○ OAuth
API Credential Config	○ This field references the credential record used for authentication when **Basic** is selected as the Authentication Type. ○ It typically points to a Basic Auth credential stored securely in the system.
OAuth Application Registry	○ The OAuth application registry used for cross-instance integrations. ○ This field is only available if **OAuth** was selected as the **Authentication Type**.
OAuth User Profile	The OAuth user profile used for cross-instance integrations.

Note: See Scan Engine integrations for details on integration setup.

Configure definition properties

You can configure additional capabilities and configuration options for the definition ruleset.

Setting	Description
Enable Definition Synchronization	Allows you to push new definitions and definition updates to production. After that, changes flow from the production instance to any test instances listed in the **My SN Instances** related list.
Enable Instance Specific Definitions	When enabled, an additional field will appear on all definition records, **SN Instances to Run On**. This will allow you to specify definitions to: • Run on production instance(s) only • Run on all sub-production instances • Run on specified instances If you select this option, an additional field allows you to determine specific instances for this definition to run on. Only instances defined in the **My SN Instances** related list can be selected. Definitions will only run on the instances they are configured for. Otherwise, all definitions will run (as long as the definition is marked "active").

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Setting	Description
	Important: If this is enabled and the **My SN Instances** related list does not contain the current instance, no scans will run for it.
Override Instance-Specific Definitions For Definition Scanning	• Overrides instance-specific Scan Engine definitions when scanning for findings against a specific definition using **Scan instance for this finding**. • Helpful for testing a single production-only definition in a lower environment or running a single sub-production definition against production. **Note:** This property only applies if you enable instance-specific Scan Engine definitions.
Override Instance-Specific Definitions For Update Set Scans	• Overrides instance-specific Scan Engine definitions when scanning update sets. • Helpful when promoting an update set. Retrieved update sets can be scanned against all active definitions, even if the definition doesn't apply to the instance. **Note:** This property only applies if you enable instance-specific Scan Engine definitions.

Configure real-time scanning properties

Real-time scanning properties allow control over which users have access to real-time scanning, and how the scan operates within their environment. Perform the following procedure to configure real time scanning properties.

Before you begin

Role required: Scan Engine Admin (`sn_se.scan_engine_admin`).

Procedure

1. Navigate to **ALL > Impact > Configuration > Scan Engine Properties**.
2. Select who will see real time scanning results:
   - All users
   - Only users with the `sn_se.scan_engine_user` role.

   Or, to turn off real-time scanning, select **Disable**.
3. Select whether to **Enforce real time validation**.

   Users designated in **Real Time Message Visibility** will be required to correct findings at the Error or Warning level before saving the form, as long as those findings do not have approved exception reasons.
4. Select whether to **Exclude suggestion finding**, which hides Suggestion level findings from real-time display, showing only Review, Warning, and Error levels.

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The Excluded tables area lists which tables are being excluded from real-time scanning. To add a table to this list, click at the bottom, and enter its name. You cannot remove default tables from this list.

Note: The tables listed here will be included in scheduled scans but will not display findings in real-time.

5. Enter a number for the **Maximum Lines for Real-Time Scan**. This sets the maximum number of code lines that can be scanned in real-time. Scripts exceeding this limit will not be scanned during editing.

Configure exception reason properties

When real-time enforcement, `enforce_real_time_validation` is set to `true`, Recommend level findings require an approved exception reason before the form can be saved.

Before you begin

Role required: sn_se.scan_engine_admin, sn_se.scan_engine_read_user, sn_se.internal_rest_integration

Procedure

1. Select whether to **Enforce rejected exception reason validations**.

   When enabled, and if an exception reason is rejected, the object linked to that reason becomes read-only. Users cannot make additional changes until either:

   - The Recommend level message is resolved.
   - A new exception reason is submitted.

   This ensures strict compliance with validation rules and prevents inconsistent or unauthorized updates while an exception is unresolved.

2. Select whether to **Enable approvals in production**.
   If `enable_exception_reason_approvals_in_production` is set to `false`, exceptions can only be approved in the instances in which they are raised.

   Note: This setting is only applicable to development instances.

3. Approval groups will approve or reject exception requests and receive notifications.
   - Use the `Enable approvals in production` setting to control whether exceptions can be approved in production instances or only in development environments.
   - Approval group(s) displays the group or groups that will approve or reject exception reasons and also receive notifications when new approvals are requested.
4. Select whether to **Exclude approved exception reasons from technical debt**.

   When enabled, findings with approved exception reasons will be excluded from technical debt metrics.

   Note: This does not remove the finding from the system.

5. **Upon new finding found**, `er_finding_number_validation`, determines how exception reasons are handled when the same issue is detected again in a subsequent scan. Options are: **Auto Accept Existing Reason** and **Re-approve Existing Reason**.
6. **Upon line number change**, `exception_reason_validation`

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- Determines how approved exception reasons are handled when the finding's line number changes in the code.
- Options are **Auto Accept Existing Reason** (default) and **Re-approve Existing Reason**. Choose whether to automatically accept the existing reason.

Configure update set scanning properties

The Scan Engine provides several options to further configure update set scanning and enhance the governance over update set management. Update set scanning occurs during scheduled instance scans. The settings on this tab define which update sets will be scanned, and the parameters those update sets have to meet in order to be marked complete.

Before you begin

Role required: Scan Engine Admin (`sn_se.scan_engine_admin`).

Update sets are scanned in two scenarios:

- During scheduled instance scans, based on the scanning condition
- When a user attempts to mark an update set as Complete (if enforcement is enabled)

Important: Filter conditions should be set for completing an update set with respect to parent and child update sets where if the update set being committed is a child update set.

Otherwise, an error, `Update set "xxx" does not meet the completion criteria defined by the Scan Engine. Please resolve the identified finding(s) before proceeding.` may be returned as there are additional checks performed between a parent vs a child update set.

.

Role required: Scan Engine Admin (`sn_se.scan_engine_admin`).

Procedure

1. Select whether to **Enable update set summary scan synchronization**.
   This allows update set summary scans to be synced between instances.

   Note: Data synchronization is exclusively for explicitly defined instances within the multi-instance communication API integration.

2. **Table for update set scanning condition** specifies which table the scan condition builder references. By default, this is `sys_update_set`, and is typically not changed.
3. Configure the **Update set scanning condition** properties using the condition builder.
   The Scan Engine uses these defined conditions to determine which update sets to scan for findings.

   By default, two conditions are already set to filter out both non-active and default update sets. `State is in progress` and `Name matches regex ^(?!Default).*`. The `regex ^(?!Default).*` condition filters out update sets named 'Default'. You can add and configure additional filter conditions by selecting **Add filter condition**. You can also add and configure OR clauses by selecting **Add OR clause**.

   Note: You can append filter conditions and OR clauses to existing conditions by selecting the AND or OR options next to them.

4. Select whether to **Enforce update set validation**.

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Requires that update sets meet the conditions specified in step 5, **Conditions for completing an update set**, in order to be marked complete by a developer.

> **Important:** If the specified conditions are not met, a business rule validates the conditions before allowing the status to change to Complete. The update set cannot be marked complete until the set conditions are met.

5. Configure the **Conditions for completing an update set** (`table_for_update_set_completing`) using the condition builder.
   The Scan Engine automatically scans update sets during a save when the status changes to **Complete**. It then uses these defined conditions to determine whether to allow that change or not.
6. Select whether to **Override Environment Check for Update Set Scans**.
   When enabled, all active definitions run during update set scans regardless of instance-specific settings. This is useful for validating update sets before promoting them to production.

Analytics Dashboards

Analytics Dashboards provide a graphical way to view detailed information relating to findings, both pending and resolved, with the Scan Engine. The dashboards are role-based, allowing for persona-based views of information. They display#key metrics, #charts, and #trend analysis.

Analytics Dashboards vary depending on your ServiceNow role. As each role has specific needs and responsibilities, the dashboard is tailored to provide relevant insights and metrics per role.

Each dashboard role has a correlative relationship with its corresponding dashboard view. Users will only be able to access dashboard views associated to the roles their account has been granted.

Analytics Dashboard experience per role

Role	Description
Executive `sn_impact_common.Impact Executive`	Provides executives a high-level view of platform health and AI remediation impact. It focuses on strategic indicators such as technical debt, compliance risk, and overall cost and time savings from Platform Health fixes. The view is designed to help leadership understand business value and make informed decisions about investments and priorities without diving into technical details.
Platform Owner `sn_impact_common.Impact Platform Owner`	Provides visibility into scan results, remediation progress, and technical debt across instances. This view is designed for operational oversight. It helps owners manage risk, enforce governance, and ensure workflows are running efficiently.
Team Lead `sn_impact_common.Impact Development Team Lead`	Highlights assigned findings and team performance metrics. This view is centered on delivery and resource management. It helps team leads balance workloads, track progress, and keep remediation aligned with project timelines, ensuring smooth execution without disrupting other deliverables.
Developer	Provides hands-on, task-focused information such as developer assignments, detailed findings, and outstanding

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Analytics Dashboard experience per role (continued)

Role	Description
`sn_impact_common.Impact Developer`	exception reasons. Developers can quickly act on issues, provide feedback, and streamline remediation work, reducing manual effort while maintaining code quality.

Accessing Analytics Dashboards

Access the Analytics Dashboards to view detailed information relating to Scan Engine findings, both pending and resolved.

Make sure you have been assigned the correct role for your persona.

Role required: Executive, Platform Owner, Team Lead, or Developer

1. Navigate to **ALL** > **Impact** > **Platform Health** > **Analytics Dashboard**.

   Your assigned role is listed at the top left, which determines which dashboard view you can access.

2. If you have been assigned to more than one role, select which dashboard to view.

   The date listed is the last completed scan date to let you know whether the charts in the dashboard are up-to-date.

   Note: All dashboard metrics fluctuate as the scan progresses and will stabilize once it completes.

3. On the **Options** list, select one of the following:
   - **Scan progress**: Display the full scan progress page for complete metrics of any currently running or previously run scan.
   - **Property configuration**: Open the Scan Engine properties page.
4. To sort and view a chart or table, select **Option**, and then select one of the following:
   - **Cost**: Cost is calculated by multiplying the Average development rate (configured in the Scan Engine properties) by the estimated time to resolve the finding (as set in the finding's associated definition).
   - **Count**: The total number of findings.
   - **Time**: Each definition includes an estimated time to resolve based on expert-driven recommendations. These estimates serve as practical guidelines to help teams estimate how long an issue should take to fix on average, promoting better planning and prioritization.
5. Select a date range for trend chart data:
   - Pre-defined range
   - Custom #range: Select start and end dates. Enter #the start and end dates directly into the range textbox, then select **Apply**.

     Note: The amount of historical data stored and displayed in these metrics varies depending on the data restrictions associated with your Platform Analytics package.

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6. Select the download button to save a CSV or Excel file of the currently displayed data in a table.

   Blue text within table cells are hyperlinks to other modals or new tabs. Blue table column headers are sortable (select the header to sort). In sorted tables, the sorted column will have a small caret next to its name.

Accessing Analytics Dashboards

Access the Analytics Dashboards to view detailed information relating to Scan Engine findings, both pending and resolved.

Before you begin

Make sure you have been assigned the correct persona for your role.

Role required: Executive, Platform Owner, Team Lead, or Developer.

Procedure

1. Navigate to **ALL** > **Impact** > **Platform Health** > **Analytics Dashboard**.
   Your assigned role is listed at the top left, which determines which dashboard view you can access.
2. If you have been assigned to more than one role, select which dashboard to view.
   The date listed is the last completed scan date to let you know whether the charts in the dashboard are up-to-date.

   Note: All dashboard metrics fluctuate as the scan progresses and will stabilize once it completes.

3. **Optional:** On the **Options** list, select one of the following:
   - **Scan progress**: Display the full scan progress page for complete metrics of any currently running or previously run scan.
   - **Property configuration**: Open the Scan Engine properties page.
4. To sort and view a chart or table, select **Option**, and then select one of the following:
   - **Cost**: Cost is calculated by multiplying the Average development rate (configured in the Scan Engine properties) by the estimated time to resolve the finding (as set in the finding's associated definition).
   - **Count**: The total number of findings.
   - **Time**: Each definition includes an estimated time to resolve based on expert-driven recommendations. These estimates serve as practical guidelines to help teams estimate how long an issue should take to fix on average, promoting better planning and prioritization.
5. On Executive #and #Team Lead#dashboards, select a date range for trend chart data:
   - Pre-defined range
   - Custom #range: Select start and end dates. Enter #the start and end dates directly into the range textbox, then select **Apply**.

   Note: The amount of historical data stored and displayed in these metrics varies depending on the data restrictions associated with your Platform Analytics package.

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6. On Team Lead and Developer dashboards, select the download button to save a CSV file of the currently displayed data in a table.
   Blue text within table cells are hyperlinks to other modals or new tabs. Blue table column headers are sortable (select the header to sort). In sorted tables, the sorted column will have a small caret next to its name.

Scan Engine Executive dashboard

The Executive dashboard includes trend charts and the following overview modules.

Executive dashboard overview

Information module	Description
Outstanding technical debt	• The total time required to resolve existing technical debt on your platform, based on the effort of a single developer.#t does not include time for testing, validation, or other stages of the software development life-cycle (SDLC). • The graph line shows the trend of technical debt over a certain time period. • The time period shown depends on available data, with a maximum of 90 days of information displayed.
Technical debt prevented	• Reflects the amount of technical debt prevented from entering the instance because of the Scan Engine's real-time prevention. • The graph line shows the trend of technical debt prevented over the past month.
Health score	The health score represents the percentage of definition occurrences used across the platform that did not return any findings. It is calculated as: `1 - (F / D) * 100` Where F is the number of findings, and D is the number of definition occurrences. "Definition occurrences" refers to the total number of times a definition has been executed by the Scan Engine to generate findings.
Health score thresholds	• 90-100% = Excellent • 80-89% = Good • 70-79% = Fair • Below 70% = At risk
Findings resolved by proposed fix	The number of findings resolved using the proposed fix feature. **Note:** This feature is only available to ServiceNow customers who have purchased the Impact Total package or the Platform Health add-on.

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Executive dashboard overview (continued)

Information module	Description
Findings by categories	• The estimated amount of development cost required to resolve all findings within each category. • The value shown in the center is the combined total finding of cost, time, or count for all categories
Active definitions	The definitions used to determine violations with the Scan Engine.
Findings resolved by AI	The number of findings resolved using the Code Fix AI Agent feature. **Note:** This feature is only available to ProPlus customers.

Executive dashboard trend charts

The Executive dashboard includes the following trend charts.

Executive dashboard trend charts

Chart	Description
Outstanding technical debt	• The amount of development time required to resolve all findings. • You can customize the time period using the date selector.
Health score	The percentage of scanned definitions that returned zero findings. This is calculated as: `1 - (F / D) * 100` Where F is the number of findings, and D is the number of definition occurrences.
Outstanding findings	The trend of all findings found during the scheduled instance scan.
Total impact to instance	• The total impact to instances, derived from the sum of the scheduled scan findings over the selected time period. • Represents the impact of your findings to your instance when a finding is not resolved. • You can customize the time period using the date selector.
Real-time preventions	• The sum of real-time preventions over the selected time period. • A real-time prevention is when the Scan Engine prevents a finding from being saved. • You can customize the time period using the date selector.

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Executive dashboard trend charts (continued)

Chart	Description
Total resolved findings	• The trends for all resolved findings found from nightly instance scanning over the selected time period. • You can customize the time period using the date selector. • You can select one of the following display options: ○ **All resolved findings** ○ **Findings by proposed fix applied** ○ **Findings that were resolved manually** **Note:** The Scan Engine property **Track resolved findings** must be active to populate this chart. See Configure Scan Engine properties.
Instance comparison	A side-by-side comparison of the technical debt for all instances in the My SN Instances table. Technical debt is broken down by category to quickly view differences between environments.

Executive dashboard data sources

The following tables show the data source for each overview and trend chart in the Executive dashboard.

Note: All components require either the impact.admin or impact.executive role to use.

Executive overview data sources

Component	Data Source
Outstanding technical debt	sn_se_summary_scan_detail
Technical debt prevented	sn_se_onsubmit_prevention
Health score	sn_se_scan_result
Findings resolved by proposed fix	sn_se_resolved_finding_history
Findings by categories	sn_se_summary_scan_detail
Active definitions	sn_se_definition
Codefix AI agent	sn_impact_code_remediation_suggestion_item
Outstanding findings	sn_se_summary_scan_detail
Definition occurrences	sn_se_scan_result

Executive trend chart data sources

Outstanding technical debt	sn_se_summary_scan_detail
Health score	sn_se_scan_result
Outstanding findings	sn_se_scan_result

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Executive trend chart data sources (continued)

Total impact to instance	sn_se_scan_result
Real time preventions	sn_se_onsubmit_prevention
Total resolved findings	sn_se_scan_result
Instance comparison	sn_se_my_sn_instances

Note: `sn_se_scan_result` and `sn_se_summary_scan_detail` are populated from the latest full scan or delta scan, the values are updated after the scan is completed.

Scan Engine Platform Owner dashboard

The Platform Owner dashboard includes trend charts and the following overview modules.

Platform Owner dashboard overview

Information module	Description
Outstanding findings	The number of unresolved findings identified by the Scan Engine that have not been addressed.
Health score	The health score represents the percentage of definition occurrences used across the platform that did not return any findings. It is calculated as: `1 - (F / D) * 100` • *F*: The number of findings • *D*: The number of definition occurrences which is the total number of times a definition has been executed by the Scan Engine to generate findings.
Lines of code scanned	The total number of lines of code analyzed by the Scan Engine, including all script field code and any scanned base system records.
In progress update sets	The number of unfinished update sets currently being worked on by developers.
Findings by impact to instance	• The total findings for the instance, grouped by impact to instance. • Impacts to instance range from 1 (minor impact) to 10 (significant impact). You can select a bar on the chart to list the findings for that impact to the instance in a new browser tab.
Open findings by team	All available teams configured on the instance through the **Team Leads** related list on the **Scan Engine Properties** page. You can select a team from the list to show their corresponding information in the module and trend charts. **Note:** The number next to the team name is the number of open findings held by that team.

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Platform Owner trend charts

The Platform Owner dashboard includes the following trend charts.

Platform Owner dashboard trend charts

Chart	Description
Technical debt	• The amount of development time required to resolve all findings. • You can customize the time period using the date selector.
Technical debt by team	• A team's total technical debt, represented as the estimated amount of development time required to resolve all team findings. • You can configure the teams displayed on this chart in the Scan Engine properties.
Findings by team	• The number of findings by team, classified by state and category. • Select a number to see the list of findings for that team in a new browser tab.
Findings by impact to instance	• Findings listed in order of highest impact to your instance with the lowest time to resolve. Address these findings first to achieve the highest impact with the lowest effort. • Select any finding number to view its details in a new browser window.
Real time preventions	• The findings that were corrected during development for each team. • The default time span for these preventions is 30 days. You can customize time spans using the date selector.
Real time preventions trend	• All real-time preventions by a team during the selected time period. A real-time prevention is when the Scan Engine prevents a finding from being saved. • You can customize the time period using the date selector.
Findings by file type	• A heatmap of findings by file type. Lets you quickly identify development areas that need the most attention. • Select a number in a cell to see the full list of violations for that file type/category.
Update sets	• A list of update sets on all configured instances for the selected time period. • You can customize the time period using the date selector. • You can add and configure instances in the **My SN Instances** related list in the Scan Engine properties.
Exception reasons	The number of exception approval requests by status for each team.

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Platform Owner dashboard trend charts (continued)

Chart	Description
Findings by suite	• The number of findings by category, classified by suite. • Lets you identify findings within top-level suites and engage the relevant process owners. • Select a table entry to view the list of findings for that category in a new browser tab.

Platform Owner dashboard data sources

The following tables show the data source for each module and trend chart in the Platform Owner dashboard.

Note: All components require either the impact.admin or impact.platform.owner role to use.

Platform Owner overview data sources

Component	Data Source
Outstanding findings	sn_se_scan_result
Health score	sn_se_scan_result
Lines of code scanned	sn_se_scan_result
In progress update sets	sn_se_scan_result
Findings by impact to instance	sn_se_summary_scan_detail
Open findings by team	sn_se_summary_scan_detail

Platform Owner trend chart data sources

Component	Data Source
Technical debt	sn_se_summary_scan_detail
Technical debt by team	sn_se_summary_scan_detail
Findings by team	• sn_se_summary_scan_detail • sn_se_summary_resolved_detail • sn_se_findings
Findings by impact to instance	sn_se_summary_scan_detail
Real time preventions	sn_se_onsubmit_prevention
Real time preventions trend	sn_se_summary_scan_detail
Findings by file type	sn_se_summary_scan_detail

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Platform Owner trend chart data sources (continued)

Component	Data Source
Update sets	• sn_se_scan_result • sn_se_my_sn_instances
Exception reasons	sn_se_exception_reason
Findings by suite	sn_se_summary_scan_detail

Scan Engine Team Lead dashboard

The Team Lead dashboard includes trend charts and the following overview modules.

Team Lead dashboard overview

Information module	Description
Total team technical debt	The amount of development time required to resolve all findings for the team.
Unapproved exceptions	The number of exceptions currently waiting to be approved or rejected.
Health score	The health score represents the percentage of definition occurrences used across the platform that did not return any findings. It is calculated as: `1 - (F / D) * 100` Where F is the number of findings, and D is the number of definition occurrences. "Definition occurrences" refers to the total number of times a definition has been executed by the Scan Engine to generate findings.
Active scan engine definitions	The number of definitions currently being used by the Scan Engine.
Technical debt by category	The estimated amount of development time required to resolve all findings within each category for the entire team.
Open findings by developer	• All open findings sorted by each developer on the team. • The value in the center is the total number of open findings for all selected developers. • Select a name to add or remove the developer from the chart.

Team Lead trend charts

The Team Lead dashboard includes the following trend charts.

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Team Lead dashboard trend charts

Chart	Description
Technical debt	• The amount of development time required to resolve all findings for the team. • You can customize the time period using the date selector.
Technical debt by developer	• A developer's total technical debt, represented as the estimated amount of development time required to resolve all their findings. • You can configure the developers displayed in this chart in the Scan Engine properties.
Policy prioritized findings	• Findings that have a Priority status within a policy. To view the policy, select the name in the policy column. • Select **View all findings** to view the list in a separate tab.
Findings by impact to instance	• Findings listed in order of highest impact to your instance with the lowest time to resolve. Address these findings first to get the highest impact with the lowest effort. • Select a finding number to view it in a new browser window.
Findings by developer	• The number of findings by developer, classified by category. • Select a table entry to view the list of findings for a given developer in a new tab.
Real time preventions	• All real-time preventions by the team, for the selected time period. A real-time prevention is when the Scan Engine prevents a finding from being saved. • You can customize the time period using the date selector.
Unapproved exceptions	• All requested exceptions, by developer, requiring the team lead's approval or rejection. • Select the box to the left of an exception to approve or reject it • Select a Source record entry to view it for an exception.
Real time preventions trend	• All real-time preventions by each team developer, for the selected time period. A real-time prevention is when the Scan Engine prevents a finding from being saved. • You can customize the time period using the date selector.
Update sets	• All current update sets for the configured instance over the selected time period. • You can customize the time period using the date selector.

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Team Lead dashboard trend charts (continued)

Chart	Description
	• To filter the list, select the filter in the column heading. • You can add and configure instances from the **My SN Instances** related list in the Scan Engine properties.

Team Lead dashboard data sources

The following tables show the data source for each overview module and trend chart in the Team Lead dashboard.

Note: All components require either the impact.development.team.lead or impact.app.admin role to use.

Team Lead overview data sources

Total team technical debt	sn_se_summary_scan_detail
Unapproved exceptions	sn_se_exception_reason
Health score	sn_se_scan_result
Active definitions	sn_se_definition
Tech debt by category	sn_se_summary_scan_detail
Open findings by developer	sn_se_summary_scan_detail

Team Lead trend chart data sources

Technical debt	sn_se_summary_scan_detail
Technical debt by developer	sn_se_summary_scan_detail
Policy prioritized findings	sn_se_finding
Findings by impact to instance	sn_se_summary_scan_detail
Findings by developer	• sn_se_summary_scan_detail • sn_se_finding
Real time preventions	sn_se_onsubmit_prevention
Unapproved exceptions	sn_se_exception_reason
Update sets	sn_se_scan_result
Real time preventions trend	sn_se_summary_scan_detail

Note: The Team Lead dashboard charts only include data for members underneath the defined team lead.

Scan Engine Developer dashboard

The Developer dashboard includes trend charts and the following overview modules.

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Developer dashboard overview

Information module	Description
My open findings by impact to instance	• A developer's total findings grouped by impact to instance. • Impacts to instance range from 1 (minor impact) to 10 (significant impact). • Select a bar in the chart to view the findings in a new browser tab.
My technical debt by category	• The estimated amount of development time required to resolve all findings within each category. • The value in the center is the combined total technical debt displayed in either time or count for all categories.

Developer trend charts

The Developer dashboard includes the following trend charts.

Developer dashboard trend charts

Chart	Description
My findings by priority	A developer's assigned findings listed by highest impact to instance and lowest time to resolve. Address these findings to achieve the highest impact in return for the lowest effort.
Policy prioritized findings	• A developer's findings that have a Priority status within a policy. • Findings listed here were last updated by the developer.
My open findings	The current open findings that the Scan Engine has identified in a developer's code.
My exceptions	The current exceptions a developer has submitted that require a Team Lead's approval.
My findings by file type	• The heatmap of your findings by file type. This lets you quickly see which development areas need the most attention. • Select a number in any cell to see the full list of findings for that file type/ category.
My resolved findings	Findings that have been resolved in a developer's code.

Developer dashboard data sources

The following tables show the data source for each overview module and trend chart in the Developer dashboard.

Note: All components require either the impact.admin or impact.developer role to use.

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Developer overview data sources

Component	Data Source
My open findings by impact to instance	sn_se_summary_scan_detail
My technical debt by category	sn_se_summary_scan_detail

Developer trend chart data sources

Component	Data Source
My open findings by priority	sn_se_finding
Policy prioritized findings	sn_se_finding
My open findings	sn_se_summary_scan_detail
My exceptions	sn_se_exception_reason
My findings by file type	sn_se_summary_scan_detail
My resolved findings	sn_se_resolved_finding_history

Scan Engine integrations

You can integrate the Scan Engine into a variety of processes, such as the syncing of definitions or exception reasons, as well as integrating with your existing agile project management systems.

Scan Engine has the ability to integrate with your other environments running Impact so that you can:

- Compare technical debt across instances
- Sync custom definitions across instances
- Enable approvals for finding exceptions in production
- Create user stories from findings

The following integrations are available for the Scan Engine.

Scan Engine integrations

Integration	Description
Definitions integration	Allows users to synchronize definition overrides and custom definitions between sub-production and production instances. Ensuring a consistent ruleset is being applied throughout the instance stack.
Exception reason integration	• Synchronizes exception reasons between sub-production and production instances. • Facilitates the approval or rejection of exception reasons in the production environment.
User story integration	Creates tasks for findings from a ServiceNow instance to: • ServiceNow production Instance • Jira

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Scan Engine integrations (continued)

Integration	Description
	• Azure DevOps • Others
Update set integration	Synchronizes update set summary scans to the production instance from instances where this integration is enabled.
AES/ AEMC integration properties	Provides automated governance for custom app deployments by validating deployment requests against admin-defined conditions before approval. When a developer submits a deployment request, the system automatically runs compliance checks to ensure all required rules are met, blocking deployment if conditions fail.

Note: Except for Jira, Azure DevOps and AES/AEMC integration types, you must first register your instances as part of **My SN Instances**. You will then need to configure either your basic or OAuth authentication methods for your instances to enable synchronization.

Register your instance

Populate and configure ServiceNow instances to take advantage of exception processing in production, definitions sync, and user story creation and tracking.

Before you begin

Role required: Scan Engine Admin (sn_se.scan_engine_admin).

Procedure

1. Navigate to **ALL** > **Impact** > **Configuration** > **Scan Engine Properties**, and then open the **My SN Instances** related list tab.
   Each record in the table indicates a ServiceNow instance connected to the current instance through API integrations. There should also be a record for the current instance as well.
2. Refer to Configure the basic authentication method or Configure the OAuth authentication method to complete the registration process.

Configure the basic authentication method

For instances that use the basic authentication method, you must assign users the Integration role, create an authentication record, import both into each instance that will use Scan Engine integrations, then connect your instances.

Before you begin

Role required: Scan Engine Admin (sn_se.scan_engine_admin).

Procedure

1. Create an integration account with the required role (sn_se.internal_rest_integration) by navigating to **All** > **System Security** > **Users and Groups** > **Users**. Then select **New**.
   For more information on creating a new user, see Create user form.

   Note: You can also use an existing integration user by ensuring they are provisioned for the required role.

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2. To create a basic authentication record, navigate to the `sys_auth_profile_basic` table, and then select **New**.
   Ensure that the record contains the same username and password established for the user in step 1. Also, make sure you set **Application** to **Scan Engine**.
3. Export the user (from step 1) and the basic authentication record (from step 2), and then import them to all instances that will use Scan Engine integrations.

   Note: Ensure that you assign the integration role to the user account in each instance. After importing, verify that the passwords match, as they may not carry over correctly.

4. Navigate to **ALL > Impact > Configuration > Scan Engine Properties**, then select the **My SN Instances** tab.
   Make sure you are on the Development instance when performing these steps.
5. Select **New** to create a new record for each instance that will use Scan Engine integrations.

   a. Ensure that you set **Authentication type** to **Basic**.

   b. For **API Credential Config**, enter the basic authentication record you created in step 2.

   Important: The instance URL must contain your instance name. For example, if your instance name is `demodev1` then the URL should be `www.demodev1.service-now.com/`.

   c. Enter an **Instance Name**. For example, if your URL is `https://demodev1.service-now.com/`, then the instance name value should be `demodev1`.

   d. Enter the full **Instance URL**.

   e. Select the correct **Environment**, either **Development**, **Production**, or **Test**. Note that only one instance can be listed as **Production**. Otherwise, the integration will fail.

   f. **Validated** indicates whether the instance has been successfully validated using the **Validate Connection** action available on the instance configuration form. This action attempts a live connection to the target instance using the defined credentials and connection parameters. If successful, the instance is flagged as `Validated = true`, and **Validation** will be enabled on this screen.

   g. **Connection status** represents the current state of connectivity between local and remote instances. This field is automatically updated based on the results of the validation process. It reflects the outcome of the live connection test and cannot be edited.

   h. Set the **Authentication Type** to **Basic**.

   i. For **API Credential Config**, enter the basic authentication record you created in step 2.

6. Promote or export the list of **My SN Instances** to all instances that will use Scan Engine integrations.
7. In an instance that will use Scan Engine integrations, navigate to **ALL > Impact > Configuration > Scan Engine Properties**, and then select the **My SN Instances** tab.
8. Select and view the production records you imported, and then select **Validate Connection**.

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After a few moments, the connection status should update to **Connection Valid** for this sub-production environment.

9. Select **Update** to save your changes.
   The configuration has now been set up between instances
10. Repeat steps 7 through 9 for each instance that will use Scan Engine integrations.

Configure the OAuth authentication method

To configure the OAuth authentication method, you need create an OAuth authentication record, producer and consumer application registries for each instance that will send data, and then import the user, OAuth authentication record, and consumer application registries to the instances that will use the scan engine.

Before you begin

Role required: Scan Engine Admin (sn_se.scan_engine_admin).

Procedure

1. To assign a user or users the Integration role (sn_se.internal_rest_integration), navigate to **ALL** > **System Security** > **Users and Groups** > **Users**, and then select **New**.
   For more information on creating a new user, see Create user form.
2. To create an OAuth authentication record, navigate to `sys_auth_profile_oauth2.list`, and then select **New**.
   Ensure that the record:
   - Is created in the Scan Engine scope
   - Contains the same username and password established for the user in step 1
3. Export the user (from step 1) and the OAuth authentication record (from step 2), and then import them to all instances that will use Scan Engine integrations.
   Once the user is exported, you must reassign it the Integration role, as roles do not transfer during the export process. In addition, password fields may become corrupted during the import/export process, so ensure that they are still accurate.
4. To establish a successful connection between instances, you must create a minimum of one provider and two consumer application registries.
   The provider serves as the endpoint. To create a connection that flows from the Development to the Production instance, you must create a provider on the Production instance.

   By contrast, to create a connection that flows from the Production to the Development instance, you must create a provider in the Development instance. These providers will have corresponding consumer application registries in all instances they communicate with, including themselves. The same logic applies for any other environments (for example, Test or Q&A).

5. To configure the provider application registry:
   a. On a Production instance, navigate to **All** > **System OAuth** > **Application Registry**, and then select **New**.
   b. Select **Create an OAuth API endpoint for external clients**.
   c. To configure the new application registry record form, set the **Name** to `[Instance Name] - Provider`, then set the **Client Secret**.
   d. Make note of the Client ID and Client Secret entries as you will need them to populate the consumer OAuth application registry.
   e. Save the record.
6. Set up the consumer application registry.

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a. On the Development instance, navigate to **ALL** > **System OAuth** > **Application Registry**, and then select **New**.

b. Select **Connect to a third-party OAuth Provider**.

c. Configure the new application registry record form.

i. Enter the Client ID and Client Secret for the provider application registry.

ii. Set the **OAuth API Script** to **OAuthUtil**.

iii. Verify that **Default Grant Type** is **Resource Owner Password Credentials**.

iv. Set the **Token URL** to `[provider instance url]/oauth_token.do`.

d. Save the record.

7. Initiate the connection between the provider and consumer instances.

a. Export the consumer application registry record to the consumer instance.
The consumer record must exist in both the provider and consumer instances. Initiate this step on the provider (Production) instance, and then complete the step in the consumer (Development) instance.

> **Important:** Once you import the record into the consumer instance, verify that the **Client Secret** matches the one you created previously.

b. Navigate to **ALL** > **Impact** > **Configuration** > **Scan Engine Properties**, and then open the **My SN Instances** related list.

c. Populate the following fields with the information from the provider instance:

- **Instance Name**: The provider instance name (derived from the provider instance URL).
- **Instance URL**: The provider instance URL.
- **Environment**: The provider environment type.
- **Authentication Type**: OAuth.
- **OAuth Application Registry**: "`[Provider instance] - Consumer`.
- **OAuth User Profile**: The OAuth authentication record you created previously.

d. Save the record, and then **Validate Connection**.
Connection Status should update to **Connection valid**.

Finalize OAuth configuration

To finalize the OAuth configuration, perform the following steps.

Before you begin

Role required: admin

Procedure

1. Export the My SN record to the provider instance.

> **Note:** You should export the My SN record rather than individually create it as the system IDs must match for a proper configuration.

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2. Repeat steps 6 and 7 in Configure the OAuth authentication method for all additional instances that you want to configure with bidirectional communication, but designate a sub-production instance as the Provider, and the Production instance as the Consumer.
   Information such as name and URL will be taken from the sub-production instance.

   In the Development instance, the status field should now display **Connection Valid**. This indicates that setup is complete and the integration now moves bi-laterally.

   Note: When setting up instances on the **My SN instances** related list, verify that each instance is connected to their respective OAuth application registry. Developer instances should be connected to `[Developer Instance] - Consumer`. Provider instances should be connected to `[Production Instance] - Consumer`.

Definitions integration

You can push changes made to definitions, or new definitions between development and production environments to synchronize the definition ruleset.

Once completed, the changes synchronize to all configured sub-production instances defined in the **My SN Instances** table.

To register your instances, see Register your instance.

1. Navigate to **ALL** > **Impact** > **Configuration** > **Scan Engine Properties**.
2. On the Definitions properties tab, ensure that **Enable definition synchronization** is active.

Sync new, customized, overridden, definitions

You can sync overridden or custom definitions that your organization created or updated.

Before you begin

Role required: Scan Engine Admin (sn_se.scan_engine_admin).

Procedure

1. Navigate to **ALL** > **Impact** > **Definitions**.
2. Select the definition you want to sync to open its details page.
3. Select one of the following:
   - **Sync Definition**: Syncs definitions to other instances through the Production instance. You can leave a note about the synchronized change.
   - **Delete and Sync**: Deletes the definition and syncs the deletion to other instances through the Production instance. You can leave a note about the synchronized deletion.

   Note: You can also bulk sync definitions from the Definitions table. Select the box for each definition that you want to synchronize, and then select **Sync Definition** or **Delete and Sync**.

Exception reason integration

You can synchronize exception reasons from sub-production to Production instances once a record is created or updated.

Before you begin

Role required: sn_se.scan_engine_admin, sn_se.scan_engine_read_user, sn_se.internal_rest_integration

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Procedure

1. Register your instances.
   See Register your instance.
2. Navigate to **ALL** > **Impact** > **Configuration** > **Scan Engine Properties**.
3. Configure the settings on the **Exception reason** properties tab.
   For more information, see Configure exception reason properties.

Syncing exception reasons

Exception reasons are automatically synchronized to the Production instance whenever they are created or updated, based on the instances specified in the **My SN Instances** table.

If you selected **Enable approvals in production** on the **Exception reason** properties tab on the Production instance, then once the exception reason changes to the **Requested** state, approval requests trigger for the **Approval Group(s)** field. Once the exception reason is approved or rejected, the status syncs back to the Developer instance.

Configure ServiceNow integration options

Perform the following procedure to configure your ServiceNow integration options.

Before you begin

Role required: Scan Engine Admin (sn_se.scan_engine_admin).

Procedure

1. Select **ServiceNow instance** as the integration type.
2. Select the **User story table** for creating tasks in your designated target instance.
   The table must exist in your Source instance as well as the Target instance.
3. **User story field mapping** contains the script used by the task creation integration for mapping fields from findings to the chosen task table.

   Note: This script is executed twice. Once in the Source instance and once in the Target instance.

ServiceNow integration script leading practices

The following leading practices are guidelines for creating ServiceNow integration scripts.

- First, check the predefined variable isSourceto ensure that the script executes within the Source environment. Then check the predefined variable isDestination to ensure that the script is being executed in the Destination instance (usually Production).
- The predefined variable payload is an object that can be used to store variables so that they are available in the Destination instance. You should load the payload with data when the script is executing on the Source instance, and extract the payload data when the script is executing on the Destination instance.
- Use Violation in the script only when it is executing in the Source instance.
- Use grTaskin the script only when it is executing in the Destination instance.
- Use isSource in the script only when it is executing in the Source instance.
- Use isDestination in the script only when it is executing in the Destination instance.
- The payload object can be used regardless of the environment.

The predefined variables available for ServiceNow integrations are:

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isSource	True when on the Source instance (Development).
isDestination	True when on the Destination instance (Production).
payload	The user-defined variable that passes information between the instances.
grFinding	The glide record of the finding that sends the request, on the Defined instance in Source only.
grTask	The glide record being created on the Destination instance.

User story integration

With Scan Engine, you can create agile tasks and stories directly from finding records using the multiple integration options.

In User Story Integration, define a source instance and a target Instance. Source instances are those where findings are generated by the Scan Engine. Target instances are those where you create stories or tasks for tracking purposes. Development instances are common source instances and production is a common target instance, but this isn't a requirement.

- Generate task records in a staging instance where the development instance would be source and staging would be the target with flexibility to assign source and target instances using the **My SN Instances** related list.
- Once source and target instances are defined in the My SN Instance related list and validated, modify the necessary information on the User Story Integration tab.
- Select ServiceNow Instance as the Integration type then choose a User story table to create task-type records.Typically Stories (rm_story) from Agile 2.0 are used for reporting and tracking purposes.
- The final step in the process is to configure the mapping of fields from the source to the target instance using User story field mapping.

Scan Engine supports the following integrations.

Integration	Description
Configure instance user story integration	With Agile 2.0, map your instances so that they create stories in Production from findings in sub-prod environments.
Configure Azure DevOps story integration	With Azure DevOps as a Storyboard, you can link your organization and project to create specific work items from findings. **Note:** An Azure configuration is required to set up this integration.
Configure Jira user story integration	With Jira as a storyboard, you can link your domain to create specific work items from findings. **Note:** A Jira configuration is required to set up this integration.
Configure other integration options	Connect to any other integration option by providing a custom script to create the payload.

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ECMAScript 2021 (ES12) Mode

Turn on ECMAScript 2021 (ES12) mode to use ES12 for editing various script fields throughout the Scan Engine.

When modifying scripts within the Scan Engine properties form, there are various integrations which allow for this mode. Turning on ECMAScript 2021 (ES12) lets you use the latest supported JavaScript features in these integration scripts. Otherwise, you can only use the features supported by the application's JavaScript mode.

Configure instance user story integration

Formally track findings from a non-production environment using Stories in a production instance. To configure ServiceNow instance user story integration, perform the procedure.

Before you begin

Role required: Scan Engine Admin (`sn_se.scan_engine_admin`)

Procedure

1. Register your instances.
   See Register your instance.
2. Set the **User Story Table**.
   The table selected becomes the target table in which you wish to insert a record. Task-based tables such as `rm_story` are a common choice. This table should exist on both the source instance and target instance.
3. Customize the associated script to handle field updates dynamically based on the selected **User Story Table** and define **User Story Field Mapping** and the available fields.

   This allows scripting to be used to define a mapping from a finding in the lower environment to a story in the upper environment. For example, you can specify which values populate the **Short Description**, **Description**, or any other fields available on the selected table.

   By default, useful information is provided in the comments, along with a sample which can be used as a guide. Configure the script to suit your needs.

   The following variables are available when configuring source and destination instance processing scripts.

   `isSource`

   Set to `true` when executing on the source instance (dev).

   `isDestination`

   Set to `true` when executing on the destination instance (prod).

   `payload`

   A user-defined variable used to pass information between instances.

   `grFinding`

   The GlideRecord of the finding that is sending the request. Defined on the source instance only. Available fields are those of the `sn_se_finding` table.

   `grTask`

   The GlideRecord being created on the destination instance. Defined on the destination instance only. Available fields are those of the table selected in the **User Story Table** column.

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When `isSource` is `true`, the script executes only on the source instance. Use this block to load the `payload` object with variables from the finding record. The fields available are those within the `sn_se_finding` table.

```
if (isSource) {
      // This logic is ONLY executed on the SOURCE instance.
      // Load the 'payload' object with variables from the
 finding record.
      // The fields which can be used are fields within the
 sn_se_finding table.

      payload.short_description = "Story generated from finding
 - " + grFinding.getDisplayValue();
      payload.description = "Definition: " +
 grFinding.definition.short_description;
      payload.description += "\nFinding details: " +
 grFinding.getValue('finding_details');
      payload.description += "\nFinding URL:
 " + gs.getProperty("glide.servlet.uri") +
 grFinding.getLink(false);
}
```

When `isDestination` is `true`, the script executes only on the target instance. Use this block to apply the `payload` object values to fields in the Story or Task table. Ensure that `grTask.insert()` is called so that the record is created. If you selected `rm_story`, the available fields are those of the `rm_story` table.

```
if (isDestination) {
      // This logic is ONLY executed on the TARGET instance.
      // Set the field values in the Story/Task table using the
 payload object.
      // The fields which can be used are fields within the
 Story table.
      // If you selected rm_story, the fields you can set are
 those of the rm_story table.

      grTask.short_description = payload.short_description;
      grTask.description = payload.description;
      grTask.insert();
}
```

The following is a complete example showing both source and destination processing.

```
// Available variables
// isSource      - True when on source instance (dev)
// isDestination - True when on destination instance (prod)
// payload       - The user-defined variable used to pass
 information between instances
// grFinding     - The GlideRecord of the finding sending the
 request (source only)
// grTask        - The GlideRecord being created on the
 destination instance (destination only)

// Source processing and payload preparation
if (isSource) {
      payload.short_description = "Story generated from finding
 - " + grFinding.getDisplayValue();
```

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```
      payload.description = "Definition: " +
 grFinding.definition.short_description;
      payload.description += "\nFinding details: " +
 grFinding.getValue('finding_details');
      payload.description += "\nFinding URL:
 " + gs.getProperty("glide.servlet.uri") +
 grFinding.getLink(false);
}

// Destination processing and payload use
// Make sure to include grTask.insert() so that the record is
 created
if (isDestination) {
      grTask.short_description = payload.short_description;
      grTask.description = payload.description;
      grTask.insert();
}
```

4. Once the instances are validated and mapping is complete, customers will now be able to select findings to push to the target instance.

Configure Jira user story integration

Perform the following procedure to configure your Jira integration options.

Before you begin

Role required: Scan Engine Admin (sn_se.scan_engine_admin)

- To enable the integration, you will need some details from the Jira project you want to integrate with the Scan Engine. From the project settings on your Jira board, find and make note of the following information:
  - Project Key
  - Work Item type
  - Domain Name

  Note: You can get the domain name from your Jira URL. For example, if your URL is `companyname.atlassian.net/jira`, then your domain name is `companyname`.

- To connect with your Jira project, you will also need an API token:
  1. Navigate to the following URL: https://id.atlassian.com/manage-profile/security/api-tokens.
  2. Select **Create API Token**, enter a name for the token, and then select **Create**.
  3. Once the token is created, copy and store it.

     You will need it for the ServiceNow connection process.

Procedure

1. Navigate to `sys_auth_profile_basic.list`, and then select **New** to create a basic authentication record.
2. Ensure that the **Name** you define starts with something easily identifiable.
3. Ensure that the **Username** matches the currently logged-in user's email address.

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Note: Always synchronize the email of the current logged-in user with the JIRA username for seamless integration and authentication. You will also need to create a basic auth record for each user who can create work items in Jira.

4. Paste the token you acquired previously in the **Password** field.
5. Navigate to **ALL** > **Impact** > **Configuration** > **Scan Engine Properties**, and then select the **User Story Integration** properties tab
6. Select **Jira** as the **Integration Type**.
7. Populate the following fields with the information you acquired from your Jira project:
   - **Project key**
   - **Domain name**
   - **Work item type**
8. Select **Update** to finalize the connection.

Jira integration script best practices

The following best practices are guidelines for creating Jira integration scripts.

- Unlike ServiceNow integrations, the Jira integration executes the field mapping script one time per finding. Source and Destination instances do not apply with this integration.
- The **Project key** and **Domain name** fields determine which Jira project you will be sending your payload to.
- When building a script, use data from the finding by extracting fields from the grFinding variable.
- You can create a description and summary to show in your Jira project. These will become core elements in your work item type. You may use other fields in the Jira project, but you will need an understanding of the Jira API to know the available fields.
- Some general fields you can use are:
  - summary
  - description
  - project
  - issuetype

  These can be set by using this format:

```
payload = {
  'fields':{
   'summary': text to display in the title,
   'description': a description of the work item,
   'project': { 'key': the project key},
   'issuetype': { 'name': a work item type: Epic, Story, Bug,
 Task, Sub-Task}
  }
```

There are several predefined variables available for Azure DevOps Integrations:

payload	The field mapping to populate your Jira project.
grFinding	The glide record of the finding that sends the request.

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workItemType	The work item type selected for Jira integration.
Key	The project key created for Jira integration.

Configure Azure DevOps story integration

Perform the following procedure to configure your Azure DevOps integration options.

Before you begin

Role required: Scan Engine Admin (sn_se.scan_engine_admin).

- In the Azure project you want to integrate with the Scan Engine, from the project settings, find and make note of the following information:
  - Organization name
  - Project name
  - Work item type
- To connect with Azure, you will need to generate an API token:
  1. Select **Personal access tokens** from the Azure settings menu.
  2. Select **New Token**.
  3. Refer to your Azure documentation for complete details.

Procedure

1. Navigate to `sys_auth_profile_basic.list`, and then select **New** to create a basic authentication record.
2. Ensure that the Azure username matches the currently logged-in user's email address.

   Note: Keep the email of the current logged-in user synchronized with the Azure username for seamless integration and authentication. You will also need to create a basic authentication record for each user who can create work items in Azure.

3. Paste the token you acquired in the **Password** field.
4. Navigate to **ALL** > **Impact** > **Configuration** > **Scan Engine Properties**, and then select the **User Story Integration** properties tab.
5. Select **Azure DevOps** as the **Integration Type**.
6. Populate the following fields with the information you acquired from your Azure DevOps project:
   - **Organization name**
   - **Project name**
   - **Work Item type**
7. Select **Update** to finalize the connection.

Azure DevOps integration script best practices

The following best practices are guidelines for creating Azure DevOps integration scripts.

- Unlike ServiceNow integrations, the Azure integration executes the field mapping script one time per finding. Source and Destination instances do not apply with this integration.
- The **Organization name** and **Project name** fields determine which Azure project you will send your payload to.

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- When building a script, use data from the finding by extracting fields from the grFinding variable.
- You can create a description and title to show in your Azure project. These will become core elements in your task. You may use other fields in the Azure project, but you will need an understanding of the Azure API to know the available fields.
- Some general fields you can use are:
  - /fields/System.Title
  - /fields/System.Description
  - /fields/Microsoft.VSTS.Common.Risk
  - /fields/Microsoft.VSTS.Scheduling.StoryPoints

  These can be set by using this format:
  - payload['/fields/System.Title'] = a value
  - payload['/fields/Microsoft.VSTS.Scheduling.StoryPoints'] = a value

The following are predefined variables available for Azure DevOps Integrations:

payload	The field mapping to populate your Azure project.
grFinding	The glide record of the finding that sends the request.
workItemType	The work item type selected for Azure integration.

Configure other integration options

Perform the following procedure to configure options other than ServiceNow, Azure, or Jira.

Before you begin

Role required: Scan Engine Admin (sn_se.scan_engine_admin)

Procedure

1. Select **Other** as the integration type.
2. Enter your:
   - Integration name
   - End point
   - Content type
   - Issue type
3. **Payload** contains the script used by the task creation integration.
4. Enter your username and API token which will allow authentication to your connection point.

Other integration leading practices

The following leading practices are guidelines for creating other integration type scripts.

- This integration allows a more generic approach to building a request body object to send to a third-party API.
- The **Payload** field is used to format the request body.

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- The API called is determined by the endpoint, and the credentials provided on the form are used in a basic authentication authorization to the third-party tool.
- The endpoint should be the URL to the API you are calling. You will need to know what is needed in the request body to format the payload correctly. Refer to documentation for your third-party API tool to learn what format is needed in the request body.
- Currently, only basic authentication is supported when using **Other** as the integration type.

There are several predefined variables available for **Other** type integrations:

payload	The content you want to send in the request body.
grFinding	The glide record of the finding that sends the request.
workItemType	The work item type selected for the Other integration.

AES/AEMC integration properties

The AES/AEMC integration provides automated governance for custom application deployments by validating the scoped applications against admin-defined conditions before approval. When a developer submits a deployment request from App Engine Studio or ServiceNow Studio, the system automatically runs compliance checks using the Scan Engine to ensure all required rules are met. If the are not, it blocks the deployment.

Note: Configuration of deployment pipelines is beyond the scope of this topic. The information in this topic assumes that the deployment pipelines within ServiceNow are configured. For information on configuring deployment pipelines, refer to Configure Pipelines and Deployments.

Integrating Scan Engine with App Engine Studio, ServiceNow Studio, or Pipelines and Deployments requires you to perform two procedures:

- Switching the default pipeline subflow
- Configuring Scan Engine properties for AES/AEMC integration

Note: The following procedures will be performed only within the production controller which is part of the deployment pipeline.

Switching the Default Pipeline Subflow

Perform the following procedure to select the Scan Engine subflow:

1. Navigate to **ALL** > **App Engine** > **Pipelines and Deployments** > **Pipeline Types**.
2. Open the default pipeline type record by selecting its *name* in the Label column.
3. Select the link to edit the record.
4. Ensure **Deployment Pipeline** is set as the **Application** scope.
5. Change the **Subflow** to **SE App Deployment Pipeline**.
6. Save the changes to the form.

Configuring Scan Engine Properties for AES/AEMC integration

Once the default pipeline subflow has been switched to the Scan Engine pipeline subflow, you then need to configure the Scan Engine for AES/AEMC integration by performing the following procedure:

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1. Navigate to **ALL > Impact > Configuration > Scan Engine Properties**.
2. From the related lists at the bottom of the form, select the **My SN Instances** tab.
3. Create a single record to designate this instance as the production controller instance by first selecting **New**.
4. Fill in the following required and optional fields:
   a. **Instance Name** should match the `instance_name` system property.
   b. **Instance URL** is the URL of the production controller instance.
   c. **Environment** should be set to **Production**.
   d. No additional information is needed. Submit the form without setting up an **Authentication Type**.
5. When you return to the Scan Engine Properties page, select the **AES/AEMC Integration** tab in the middle of the form.
6. Ensure that the **Enable AES/AEMC Integration (Production Instance Only)** field is enabled. If it is not, check that steps 1-6 were performed correctly.
7. Select the **Enable AES/AEMC Integration (Production Instance Only)** check-box to reveal additional fields.
8. You can keep the default values or enter new ones.
9. Specify the conditions for which an application is considered "approved" to proceed to the first phase of the deployment pipeline.
10. Specify the maximum amount of time an application scan should be allowed to complete before being rejected due to a timeout.

Once configuration is complete, regular application submissions will now include an application scan as part of the deployment pipeline.

Conditions for approving an application scan

When an application is submitted from App Engine Studio or ServiceNow Studio, the integration will begin a full scan of the application that is being submitted for deployment. The conditions specified in the Scan Engine Properties page determine the approval criteria for whether application scans continue on to the deployment pipeline. When the application scan completes and the conditions are met, the application moves to the next stage of the deployment process, usually a group approval.

If the conditions are not met, the deployment request is rejected. An email message is sent to the author of the application with details of the application scan.

The conditions used are configured by the administrator.

Application scan timeout (minutes)

Application scans through the Scan Engine are usually relatively short. Ten minutes is the default value. If a scan fails to complete within ten minutes, the deployment request will be rejected and information about the rejection will be added to the request record.

Shorter or longer scan times can be configured by the administrator.

Update set integration

Scans performed on update sets automatically sync from Developer to Production instances defined in **My SN Instances** once the update set scan is marked complete.

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Before you begin

Role required: admin

Register your instances.

See Register your instance.

Procedure

1. Navigate to **ALL** > **Impact** > **Configuration** > **Scan Engine Properties**.
   For more information, see Configure update set scanning properties.
2. Select the **Update set scanning** properties tab, and then configure the settings.
3. **Optional:** Select **Enable update set summary scan synchronization** to automatically sync update set scans between instances.

Fix code in real-time with Now Assist

Fix code in real-time with Now Assist allows developers to receive real-time, AI-driven recommendations within their workspace to identify and resolve code quality issues, enabling adherence to ServiceNow, Inc. leading practices and reducing technical debt proactively.

When working with ServiceNow code, the following development areas are supported with the Fix code in real-time with Now Assist feature:

- Scheduled script execution (`sysauto_script`)
- Script action (`sysevent_script_action`)
- Business rule (`sys_script`)
- Client script (`sys_script_client`)
- Catalog client scripts (`catalog_script_client`)
- Email script (`sys_script_email`)
- Script include (`sys_script_include`)
- Transform script (`sys_transform_script`)
- List client script (`sys_ui_list_script_client`)
- UI script (`sys_ui_script`)

If code is misconfigured in those development areas in an instance, Fix code in real-time can be triggered by the developer after a finding is returned for Act or Recommend level findings.

Note: Fix code in real-time with Now Assist only displays if there are actual findings for the code, and if there is an Act or Recommend level violation against active Scan Engine definitions.

The agent will not display if:

- The only finding is at the Recommend level with an approved exception.
- All findings are filtered out based on the applicable tables.
- The definition is listed in the exclusion property.

Related topics

Configure Fix code in real-time for Platform Health

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Configure Fix code in real-time for Platform Health

Follow these steps to configure Fix code in real-time for Impact Platform Health.

Before you begin

Role required: Scan Engine Admin (sn_se.scan_engine_admin)

About this task

The following are minimum prerequisites:

- Install and configure the Impact Store App. See Configure the Impact Store Application for details.
- Scan Engine configured: See Activate Scan Engine and review settings for details.
- Now Assist for Impact, version 3.03: See Activate Now Assist skills in Now Assist for Impact for details.
- Now Assist for Platform, version 11.01

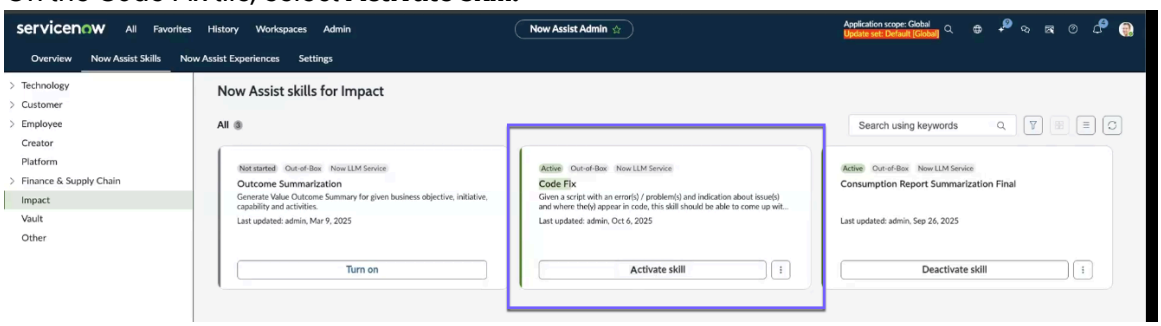
Procedure

Set system to enforce real-time validation.

1. Navigate to Scan Engine Properties System properties (`sn_se_properties.list`).
2. On the Real Time Scanning related list, set **Enforce real-time validation** to *`true`*
   Real Time Messaging must be activated, as the feature is tied to findings being present.

Activate the Now Assist Skill for Fix code in real-time.

3. Navigate to **All** > **Now Assist Admin** > **Skills**.
4. On the Now Assist Skills tab, select **Impact** from the navigation menu.
5. On the Code Fix tile, select **Activate skill.**



The button on the tile updates to *`Deactivate skill`* when the option has been selected and the status will show *`Active`*.

Set the `sn_impact_gen_ai.ai_fix.enabled` property to true.

Note: Enables the Fix with Now Assist button to display on script records.

6. Navigate to **ALL** > **System Properties** > **sn_impact_gen_ai.ai_fix.enabled** > **.**
7. Set the value to `true`.
   This value is set to `false` by default.

Assign users to have access to the Fix code in real-time panel.

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8. Navigate to **Allsys_user_role.list**.
9. In the roles table search for `sn_impact_gen` and select the `sn_impact_gen_ai.ai_fix_user` role from the table to open the role details.
10. Assign the `sn_impact_gen_ai_.ai_fix_user` role to any users or groups to use the Gen AI feature.

Bulk Fix code in real-time with Now Assist

As a ServiceNow developer, you can receive code fix suggestions when an error is detected.

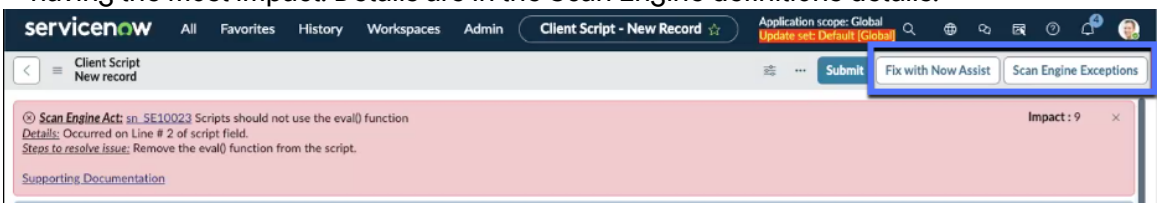
Before you begin

Complete the pre-requisites and setup steps in order to activate Fix code in real-time. See Configure Fix code in real-time for Platform Health for details.

Role required: sn_impact_gen_ai_fix_user

Procedure

1. If an error is detected that is eligible for an AI resolution, the **Fix with Now Assist** button will become visible.
   A findings message displays with the following information:
   - **Finding level state**: Act, Recommend, Suggest, or Review.
     - The ServiceNow leading practice issue finding and explanation is included.
     - Select the link to view the Scan Engine definition.
     - Findings for that definition are listed in the related lists for the definition record.
   - **Details**: Exact location in the code of the finding
   - **Steps to resolve issue**: Description of resolution
   - **Supporting documentation**: A link to KB or documentation explaining the recommended configuration
   - **Impact**: A rating on a scale of 1:10 on how the error can impact the overall code basis, with 10 having the most impact. Details are in the Scan Engine definitions details.



2. Select **Fix with Now Assist** from the menu bar to execute the remediation process.
   Review the Now Assist Panel with remediation suggestions.

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- The Now Assist panel displays the reasoning, in steps, for the findings it provided resolutions for.
- At the same time, a code comparison view displays on the script itself, illustrating the suggested modifications. Updated code is displayed in green and the removed code has a pink background.

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- The script editor is read-only until the Now Assist conversation closes, either by accepting or rejecting the proposed fix.

  Note: You can either accept the code fix as is, reject it, or provide revisions to the suggested fix. During the revision process, you can interact with the AI Agent panel to prompt it to make additional changes for each finding.

3. Enter **Accept the solution** in the AI response prompt to make the change.
   - The available prompts are displayed in the bulleted list for the proposed solution.
   - If you reject the solution, the code will be editable.

Note: Users with the executive role can access the Executive Dashboard which contains a module that displays all findings resolved using the Code Fix AI Agent. See Scan Engine Executive dashboard for additional information.

HealthScan for the Impact Delivery Instance

ServiceNow HealthScan is a diagnostic tool for the Impact Delivery Instance that helps you understand the current health of your instance, identify potential issues and setbacks, and take quick corrective action.

Impact uses HealthScan to help you understand and improve the health of your ServiceNow instance. Built on best practice definitions gathered from analyzing thousands of instances, this tool quickly scans your ServiceNow instance to provide data points across five key categories, security, upgradability, performance, manageability, and usability. For information on updates to HealthScan definitions, see HealthScan definitions.

- Improve your understanding of instance health through the use of hundreds of best practice checks
- Reduce technical debt and optimize performance
- Prevent common implementation missteps

Diagnose with tech KPIs

Tech Key Performance Indicators(KPIs) show how closely you're aligned to ServiceNow technical leading practices, offer recommendations for improvement, and help you monitor your instance health.

Tech KPIs empowers you with a easy to use visualizations of your organizations technology KPIs. To review your Tech KPIs **Instance Health** with the **Instance** drop down. Select the Tech KPIs you would like the review and use the results to review critical information.

Note: Portions of Technical KPIs may not be available to customers in the FedRAMP, NSC DOD IL5, or Australia IRAP-Protected data centers, to self hosted customers, or in other restricted environments, or to managed service providers (except for their internal#use.)

Tech KPI Sections

Section	Section Details
Summary & Takeaways & Compare to peers	Instance health dashboard displays five categories: manageability, performance, security, upgradeability, and user experience. The dashboard also includes the overall score as an additional category which displays average of all category scores. **Key takeaways**

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Tech KPI Sections (continued)

Section	Section Details
	highlight the summaries behind the scores and finally you can see score breakdowns for your tech KPIs relative to your peers.
Instance snapshot	Available to our Advance and Total Impact customers. Use Instance Observer to get an Observability overview over all your instances and get further information on them with the **Actions** drop down
Company active case breakdown	Review the active cases in your instance here.
Quick links	Get links to resources helpful for your instances.
Related conversations	See any conversations relevant to the instance selected.
Related files	See any files related to the instance

Note: Metrics available may differ between Impact subscription levels

Monitor

As a benefit of Advanced and Total packages, Impact delivers a daily performance summary of how your instances are doing. You can dive deeper into performance details using Instance Observer, which is supported on all Impact packages, pulling real-time metrics and set up performance alerts. See Overview of Instance Observer for more information.

Support

Get a dashboard view of your company's cases, case response time, case trends, and changes. You can view specific details on changes or cases in Now Support.

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Receive developer support to help troubleshoot custom code and configurations. View the consumption report to see named contacts who can request developer support. See Developer Support for more information.

Health Assessment Dashboard

View detailed Health Assessment results closer collaboration with the Impact squad to prioritize, review, and address best practice platform health findings.

The Health Assessment displays the total number of findings and comparisons against a previous scan. The assessment report addresses the findings across five categories and also the total of the categories.

Navigate to **Impact** > **Platform Health** > **Diagnose**.

View the report by:

- Total findings: All detailed findings and the counts, comparison against previous scan, and live areas to take action
- Health Score %: Shows the increase or decrease in statistical score percentage since the previous scan
- Total findings by products: Breaks the scan findings by specific application on the instance, per category.

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Health Assessment report fields

Field	Description
Category	Each tile depicts an assessment category: • Overall • Manageability • Performance • Security • Upgradeability • User Experience **Note:** Hover over the **i** icon for descriptions.
Current total	The focused number is the total number of best practice violations from the most recent HealthScan.
Previous total	The number with the up or down arrow indicator represents the total number of best practice violations differences from the previous HealthScan for comparison.
Act	Highly recommended to address these findings, generally severity 1 priority issues.
Recommended	Recommended to address these findings next. These are generally a severity 2 priority.
Discuss	Findings that can make improvements, but are not a critical severity.

Views

Select to view the assessment by summary view or list view. Toggle to the list view to show the individual findings records logged from the selected scan.

Summary View

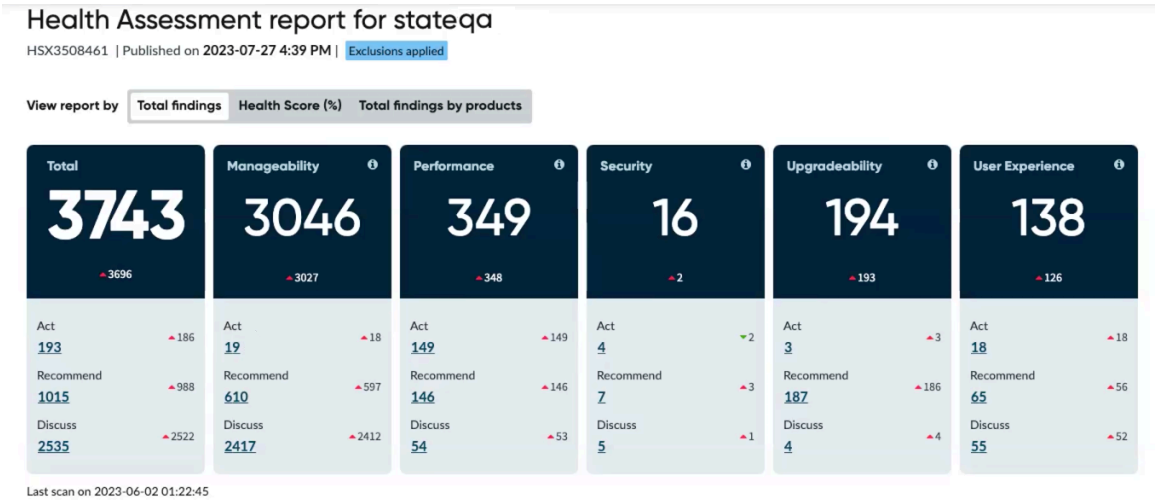


Product Name	Manageability	Performance	Security	Upgradeability	User Experience	Total
CMDB Workspace	4 ▲4	0	0	0	0	4
Compliance Management	1409 ▲1409	0	0	0	0	1409
Configuration Management Database	10 ▲10	10 ▲10	0	3 ▲3	48 ▲48	71
Customer Service Management	12 ▲12	1 ▲1	0	0	2 ▲2	15
Demand Core	0	1 ▲1	0	1 ▲1	1 ▲1	3

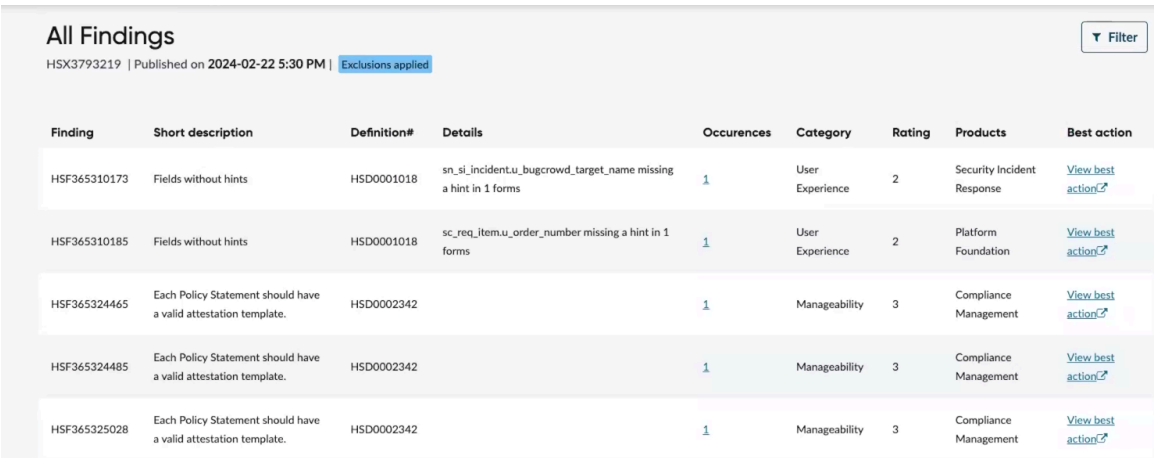
Last scan on 2024-02-22 03:12:12

Summary view shows the total of the findings and the breakdown of findings for each category. By default, the Summary View is selected, displaying the assessment information in tiles.

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List View

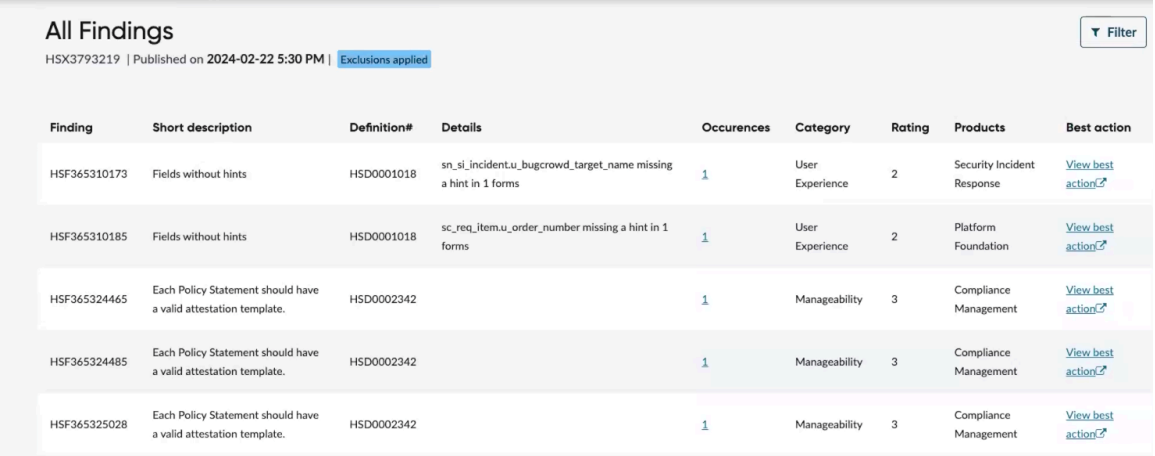


List view displays the list of individual findings that were logged during a particular scan.

List view field descriptions

Field	Description
Finding	The unique identifier of the finding record
Short description	The actual issue that was found during the scan
Definition #	Technical reference number that is searched for during a scan
Details	Provides additional context of the violation occurrence
Occurrences	The total number of occurrences, where the same type of violation can occur across multiple tables and multiple fields **Note:** The occurrences hyperlink will direct you to the instance for access to address the issue.
Best action	Link to KB articles or product documentation regarding how to address the finding

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Note: This feature is available in Impact Guided, Advanced, and Total packages.

Manage Health Assessment Dashboard

Address platform health findings from the Health Assessment Dashboard.

Before you begin

Role required: impact_admin

Procedure

1. Navigate to **Impact** > **Platform Health** > **Diagnose** > **Health Assessment**.
   The Scorecard tab is also available and may be hidden by your Impact Squad, upon request.
2. Select to view the assessment by list view or summary view.
3. Filter the findings by new, rating, or by category.

Monthly Health Assessment

The Monthly Health Assessment feature provides Impact Guided customers with a self-service capability that automates Health Assessment scans and reports to provide details that can help you to improve the health of your ServiceNow platform implementation.

Overview of health scan

Using the Impact Delivery Instance (IDI) portal, customers provide consent to allow ServiceNow HealthScan to run the monthly health scans on a specified instance and receive automated reports and recommendations.

- Automate instance health reports without having to contact your squad
- As a new ServiceNow customer, understand factors that contribute to your ServiceNow implementation health
- Understand the current state of health of their ServiceNow implementation beyond the basic Impact scorecard
- Establish a cadence of scans to track the health of your ServiceNow implementation over time
- Prepare for a substantial development release and scan for potential health impacts
- Conduct a scan to provide additional analysis when potential health#ssue#s are identified

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Important: Prior to beginning monthly health assessments, your consent is required in order for ServiceNow resources to scan your instance. You are prompted for consent when you schedule monthly health assessments.

Note: This feature is available in the Impact Guided package.

What you get

With the opt-in and self-service, you receive the following benefits:

- Monthly Health Assessment scans of a selected instance run on the sixth day of each month. Detailed scan reports will be available within a couple of weeks.
- Automated findings reports and recommendations to improve the health of your ServiceNow implementation

See Schedule Monthly Health Assessment scans for setup information.

Requested customer resources

Customer resources

Customer resource	Responsibilities
Platform Owner (Required)	Responsible for the overall accountability of the ServiceNow platform. Provides leadership and oversight to the System Administrators, ensures team alignment to business strategy and the ServiceNow roadmap, and is actively involved in the overarching governance of the platform.
System Administrator (Optional)	Maintains the stability and usability of the ServiceNow platform by performing application maintenance, managing support for cases related to ServiceNow applications, and contributing to ServiceNow software releases by delivering configuration tasks and features.

Customer agreements and terms

For customer agreements and terms, refer to the applicable Impact Accelerator description available at#https://www.servicenow.com/legal/servicenow-impact.html.

Exceptions

ServiceNow resources are not responsible for implementation or management of the Monthly Health Assessment.#However, your Impact squad may assist with instance switching and cancellation of the service.

Schedule Monthly Health Assessment scans

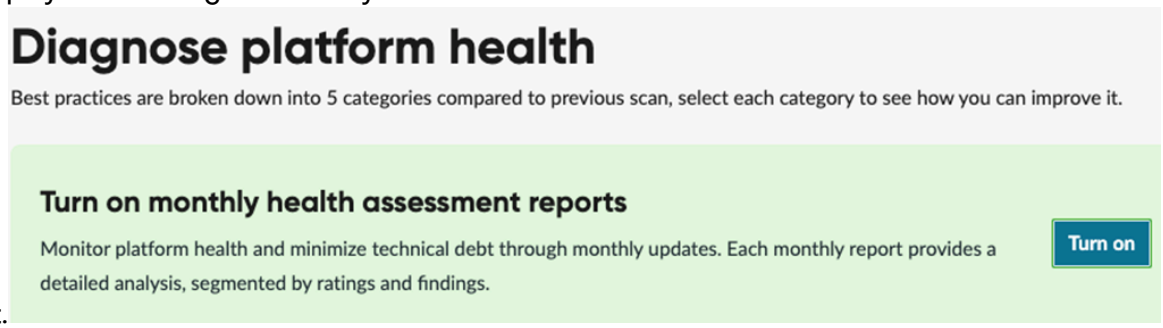
Automate monthly Health Assessment scans and reports to help improve the health of your ServiceNow platform implementation.

Before you begin
Role required: impact_permission_authorizer

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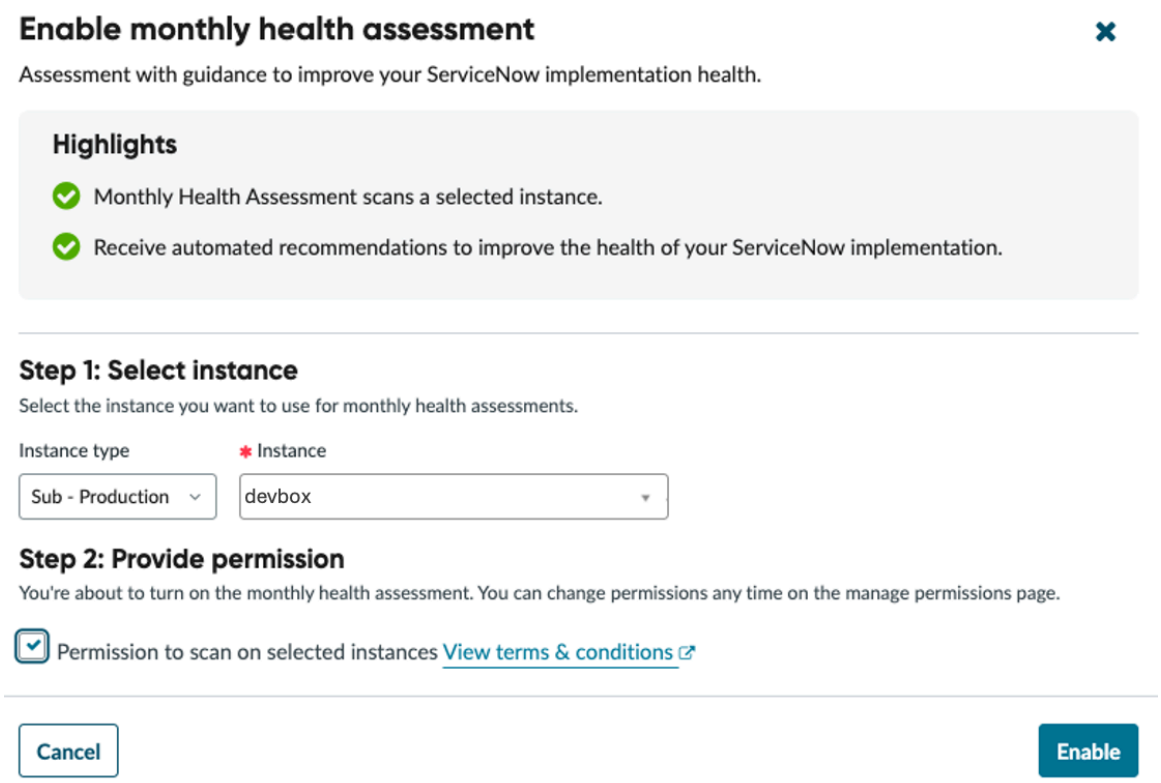
Procedure

1. Navigate to **Impact** > **Platform Health** > **Diagnose**.
   A banner displays introducing the Monthly Health Assessment.



2. Select **Turn on**.
3. Select the instance type and instance to be enabled for the auto health assessment and provide permission for the scans.

> **Important:** If you do not consent to run the automated reports, the Monthly HealthScan reports will not be scheduled.



4. Select **Enable.**
   - A success banner displays with the option to request an Accelerator, as needed, or Close.
   - The scans are conducted monthly as long as the consent is active.
5. Access the Monthly HealthScan reports in the Health Assessment Dashboard.

HealthScan definitions

Some HealthScan definitions are deprecated or updated between releases.

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Healthscan definitions updates: May 2025 store

Some HealthScan definitions are deprecated or updated between releases.

New definitions

The following definitions have been added for the May 2025 release to improve performance, reduce false positives, and meet the latest coding practices. Some of these definitions will have a positive or negative impact on your customer instance scores.

Due to process and technical constraints, a comprehensive impact analysis for the overall score impact could not be fully conducted for customer instances. As a result, there may be potential impact score drops that have not been identified or addressed.

New definitions (May 2025 release)

Number	Short description	Rating	Category	Update description
HSD0022569	Service Operations Workspace ITSM Applications is installed and active	Discuss	User Experience	New definition that checks if the plugin sn_sow_itsm_cont is installed and activated
HSD0024649	Reports with very long execution times	Discuss	User Experience	New definition to identify long running reports per DT thresholds

Updated definitions

The following definitions have been updated for the May 2025 release to improve performance, reduce false positives, and meet the latest coding practices. Some of these definitions will have a positive or negative impact on your customer instance scores.

Due to process and technical constraints, a comprehensive impact analysis for the overall score impact could not be fully conducted for customer instances. As a result, there may be potential impact score drops that have not been identified or addressed.

Updated definitions (May 2025 release)

Number	Short description	Rating	Category	Update description
HSD0001011	Common slow loading forms in the last 30 Days	Discuss	Performance	• New client threshold is 1 second (1000ms) • New total response threshold is 5 seconds (5000ms)

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Updated definitions (May 2025 release) (continued)

Number	Short description	Rating	Category	Update description
HSD0001106	Applications should use Source Control	Discuss	Manageability	• New version runs in sub-prod only. • Added better error handling. • Added manual statistic
HSD0001107	JavaScript Mode is not set correctly on application	Discuss	Manageability	New version makes clear distinction that globally scoped apps should be on ES5and scoped apps should be on ES12
HSD0001116	Client Scripts should not be defined against the Global table	Recommend	Performance	Changed documentation URL to: https://developer.servicenow.com/dev.do#!/guides/latest/now-platform/tpb-guide/client_scripting_technical_best_pr global-client-scripts
HSD0001164	Use state, not Incident State or Problem State	Recommend	Manageability	• Condition filtered only for global scope incident and problem tables • Overall code standardization
HSD0001174	Scripted Web Services writing data directly	Recommend	Security	• Removed matching requirement for semicolons • Improved Regex to a single pattern • Removed repeated

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Updated definitions (May 2025 release) (continued)

Number	Short description	Rating	Category	Update description
				use of Regex patterns • Migrated from String.match to Pattern.test • Add updateMultiple() to pattern • Added 1K limit to findings • Forced Statistic even on failures
HSD0001193	Use the condition field in Business Rules	Discuss	Manageability	• Simplified scriptingAmended query to allow • Findings on insert, update, delete and query • Business Rules Corrected RegExp Pattern • Clarified verbiage • Added condition to ignore "Auto Business rules" generated by the system
HSD0001205	Widgets not used in any dashboards	Discuss	Manageability	• New version ensures that each finding flags custom widget that it is truly unrelated to a dashboard • Added defensive scripting • Added statistic

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Updated definitions (May 2025 release) (continued)

Number	Short description	Rating	Category	Update description
HSD0001207	Form layout whitespace: make sure layout split does not have large empty areas because only one side contains fields.	Recommend	User Experience	• Updated Findings to be against sys_ui_sections containing the elements • Updated script to confirm these • Sections were updated by customer • Updated Findings display to contain the view names for these forms
HSD0001275	Scripts should not contain hard-coded IDs	Recommend	Manageability	Excluded any tables starting with itfm_
HSD0001281	getMessage() called in Client Script without preloading message key	Recommend	Manageability	• Condensed a couple regex into single pattern • Removed some string manipulation and replaced with regex capturing • Now detecting messages in double quotes as well
HSD0001344	Minimize the number of options in a choice field	Discuss	User Experience	• Updated the script to correctly check for the presence of sys_choice_set updates in sys_update_xml • Updated the messaging in

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Updated definitions (May 2025 release) (continued)

Number	Short description	Rating	Category	Update description
				the Findings to show the Language in question to the customer • Confirmed that the sys_language record is also active
HSD0001378	Reports not run for 3 months	Discuss	Manageability	Updated the query to filter out reports that are no longer active
HSD0001385	Check for automatic indicators with no scores collected	Recommend	Manageability	• Updated script to confirm that baseline / provided indicators have active m2m records to collection jobs which are also active • Adjusted some variable names and return values to be more intuitive • Updated short description and recommendation to be more clear
HSD0001398	Script Includes with duplicate names	Act	Manageability	An additional Base version check is added to trigger a finding for only non OOB records.
HSD0001467	Duplicate foundation/core data found	Act	Manageability	• Updated statistics and findings to show the duplicate count

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Updated definitions (May 2025 release) (continued)

Number	Short description	Rating	Category	Update description
				per foundation table • Findings url gives an encoded url for next experience instances showing a descending order and for the non next experience providing a non encoded url (with out specifying order)
HSD0001507	Scheduled jobs should run as dedicated integration user accounts rather than as default system	Act	Security	• Short description: Scheduled jobs should run as dedicated integration user accounts rather than as default system • Excluded sys_flow_trigger_auto_script
HSD0001533	The default "system" user preference for "rows per page" should be set to 50 or less	Recommend	Performance	Recommendation: Set the default rows per page global default property to max 50. Consider also setting the max allowable values in glide.ui.per_page property to 10,25,50. To change specific user's preferences back from larger values to lower ones, consider using

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Updated definitions (May 2025 release) (continued)

Number	Short description	Rating	Category	Update description
				a scheduled job to reset them after 7-14 days back to lower values unless the user continues to require large sets of data.
HSD0001561	Client Scripts should check for isLoading and return	Discuss	Performance	• Modified the regular expression for robustness • Filters out base version (OOB) client scripts • Elaborated the description
HSD0001627	Do not query audit log in your custom integrations and code.	Recommend	Performance	Added ua_scripted_defn to the excluded tables list
HSD0001695	Modification of State Choice set (install_status) on alm_asset table.	Act	Upgradeability	• Altered code from using hardcoded list of states to checking for sys_update_xml from the customer marking the sys_choice_set as replace on upgrade == false • Updated the short description to "Modification of State Choice set (install_status) on alm_assettable." Where it was

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Updated definitions (May 2025 release) (continued)

Number	Short description	Rating	Category	Update description
				previously "Modification of State"
HSD0001755	Modification of State Choice set (state) on resource_plan table.	Recommend	Upgradeability	Altered code from using hardcoded list of states to checking for sys_update_xml from the customer marking the sys_choice_set as replace on upgrade == false
HSD0002020	Avoid long module titles	Discuss	User Experience	• Updated documentation url Updated code to ignore module titles containing "deprecated" • Added defensive scripting • Added statistic • Made code a little more efficient via more reliance on the database • Measurably improved performance
HSD0002089	Breakdown element filter should have valid conditions	Act	Manageability	• Fixed issues with empty field name • General code cleanup • Now ignoring RLQ queries

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Updated definitions (May 2025 release) (continued)

Number	Short description	Rating	Category	Update description
HSD0002130	Valid To dates set to reasonable values	Recommend	User Experience	• Updated definition to check for latest default • Valid to date = '2100-01-01' • Updated description to Valid to date = '2100-01-01' • Updated to relevant documentation url • Added defensive scripting
HSD0002151	Use AngularJS services rather than window objects	Act	Performance	• Removed accidental inclusion of versioned HSD number in the short description • Added manual exception for the following line of code from cloned widgets: var dateFormat = window.NOW.dateFormat;
HSD0002342	Each Policy Statement should have a valid attestation template.	Discuss	Manageability	• Description updated • Documentation link adjusted Implemented 1k threshold on Findings • Resolved HSINQ0006628,

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Updated definitions (May 2025 release) (continued)

Number	Short description	Rating	Category	Update description
				HSINQ0005842, HSINQ0006736
HSD0002464	Inactive Knowledge Author	Act	User Experience	• Adjusted the script to correctly return the link to the records indicated in the Finding • Also adjusted script to only return a Finding where this is 1 or more KB Articles with a non-active Author reference
HSD0002602	List Layout with more than one List Element on the same position	Act	Manageability	An additional Base version check is added to trigger a finding for only non OOB records.
HSD0002737	UI Actions displayed as a button should be short and precise	Discuss	User Experience	• Updated documentation url • Elaborated the recommendation a little more
HSD0002808	Scripts without description	Recommend	Manageability	• Definition now queries only • Client Scripts and Script Includes. • Definition flags customized record versions only (no base versions). • Redundant code was eliminated.

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Updated definitions (May 2025 release) (continued)

Number	Short description	Rating	Category	Update description
				• Defensive coding was added. • Tests showed performance improvement with 50% run time reduction • Code is easier to read
HSD0003076	Basic authentication credentials on SOAP Message definition	Recommend	Manageability	• If a SOAP Message Definition is utilizing a Basic Auth Profile, it is no longer reported • Added a standard try/catch to capture any potential errors • Added a summary Statistic
HSD0003094	Enable Email Spam Scoring and Filtering	Recommend	Security	Updated documentation link to point to the same content in the newer syntax
HSD0003220	Agent Workspace should be used for Incident Management	Recommend	User Experience	The definition is deprecated and is replaced by HSD0022569 (Service Operations Workspace ITSM).

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Updated definitions (May 2025 release) (continued)

Number	Short description	Rating	Category	Update description
HSD0003238	Cannot Implement before Planned start date	Recommend	Manageability	• Fixed Query to look for future dates only • Updated documentation • URL Limiting to 1000 records
HSD0003995	Change Management - CAB Manager role and CAB Management group	Recommend	Manageability	• Finding now pointing to the active CAB group without active members • Finding also created when there is no Active CAB groups • Finds more than one group with this scenario
HSD0004447	Enforce Strict User Image Upload	Recommend	Security	Updated the docs link to point to same content in the newer syntax
HSD0007988	Technical Service Offerings with Parent Technical Service Reference	Recommend	User Experience	• Fixed the calculation formula that was resulting in NaN • General code cleanup
HSD0008013	Check for scheduled imports running at the same time.	Act	Performance	Removed a couple || conditions that would never match to simplify the code.

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Updated definitions (May 2025 release) (continued)

Number	Short description	Rating	Category	Update description
HSD0008070	Synchronous outbound calls should be carefully used in Business Rules and UI Actions.	Act	Performance	• Removed the 2nd sentence in the Recommendation field • Removed incorrect query condition incorrect query condition 'scriptNOTLIKEsetMIDServer' • Replaced the finding overrides and added line numbering to the output • Replaced ScriptUtils.removeCommentsfur call use with new more performant and more accurate removeComments function
HSD0009985	Last family release upgrade occurred over 1 year ago	Act	Upgradeability	Checking glide.war property instead
HSD0012244	HW Product Model with Useful Life	Discuss	Manageability	• Updated Recommendation • Updated Documentation URL • Limited results to 100
HSD0013510	Validate Remote Host	Recommend	Security	Updated description to state that if the setting is set to False vs "if not set to true"

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Updated definitions (May 2025 release) (continued)

Number	Short description	Rating	Category	Update description
HSD0013559	Do Not Use Demo Certificates for Active SAML Configurations	Discuss	Security	• Corrected logic problem • Added try/ catch • Added forced statistic
HSD0015207	Limit Attachment Size in Training and Prediction Flows	Recommend	Security	Corrected system property and code
HSD0015246	Enforce Credential Alias Usage	Discuss	Security	• Optimized remote script to take only • Validated MID servers into account. (at least 1) • Added try / catch • Added Statistic • Altered documentation link to be more specific to this issue

HealthScan definitions updates: August 2024 release

Some HealthScan definitions are deprecated or updated between releases.

Deprecated definitions

The following definitions have been deprecated for the August release.

Important: This list doesn't contain the definitions for the Security category.

Deprecated definitions (August release)

Number	Short description	Category	Reason for deprecation
HSD0002058	Articles that should have been made inactive are still accessible in the KB	Manageability	Replaced by HSD0002056 and HSD0002465

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Deprecated definitions (August release) (continued)

Number	Short description	Category	Reason for deprecation
HSD0002403	Add a finding for Skipped Items during last upgrade	Upgradeability	Duplicate HealthScan definition
HSD0018256	Find credentials with few or no affinities	Performance	Replaced by HSD0002198

Updated definitions

The following definitions have been updated for the August release to improve performance, reduce false positives, and meet the latest coding practices. Some of these definitions will have a positive or negative impact on your customer instance scores.

Important: This list doesn't contain the definitions for the Security category.

Updated definitions (August release)

Number	Short description	Category	Included in Health Assessment scans	Update description
HSD0001060	Use UI Policies Instead of Client Scripts	Manageability	X	Improved performance
HSD0001278	Before Business Rules should not update() or insert() records on other tables	Performance	X	Improved performance
HSD0001338	Business Rules should not be defined on the Global table (Global Business Rule)	Performance	X	Added check to ignore out-of-the-box records
HSD0001372	Too many fields on a form	User Experience	X	• Findings will now be reported for all forms and their form views. • Enhanced to not report form views that have 30 or more fields out-of-the-box. If fields are added on the form views and their count exceeds

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Updated definitions (August release) (continued)

Number	Short description	Category	Included in Health Assessment scans	Update description
				the threshold of 30, then a finding will be reported.
HSD0001378	Reports not run for 3 months	Manageability	X	Definition updated to provide Findings
HSD0001387	Max page list size options should not be 100 or higher	Performance	X	Best Practice check introduced
HSD0001391	Number of users with the admin role	Manageability	X	Improved performance
HSD0001398	Script Includes with duplicate names	Manageability	X	Improved performance
HSD0001518	Check for manual indicators with no scores entered	Manageability	X	Improved performance
HSD0001554	JDBC Data Sources should have the "Use last run datetime" option checked	Performance	X	Altered script to look at import histories and focus only where a threshold number of records are 'ignored' and the DS lacks this setting
HSD0001556	For domain separated instances, admins should be at the top level domain instead of Global	Manageability	X	• Altered script to#anonymize sys_user findings • Added statistic in all cases
HSD0001560	Use 'track by' in ngRepeat loops	Performance		Improved performance
HSD0001600	Transform Script that run onBefore should not update() or	Manageability	X	• Definition updated to remove OOTB transform

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Updated definitions (August release) (continued)

Number	Short description	Category	Included in Health Assessment scans	Update description
	insert() records on another table			scripts from the findings • Recommendations for the HealthScan definition updated with a more detailed solution approach
HSD0001602	Number maintenance fields unique	Manageability	X	Exclude findings where the dynamic default value is used
HSD0001632	Long running (slow) scripts	Performance	X	Improved performance
HSD0001926	Specify group types	Manageability	X	Resolved potential false positives
HSD0002151	Use AngularJS services rather than window objects.	Performance	X	Improved performance
HSD0002198	Find credentials with few or no affinities	Performance	X	• Retired duplicate # HSD0018256 • Improved the recommendation • Provided documentation link
HSD0002258	Minimize cancelled discoveries	Manageability	X	Improved performance
HSD0002370	Setup SLAs for Case Management	Manageability		• Changed short description • Document URL change
HSD0002415	Width of the Special Handling Notes pop-up	User Experience		Changed recommendation

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Updated definitions (August release) (continued)

Number	Short description	Category	Included in Health Assessment scans	Update description
	window in pixels cannot be less than 300 pixels.			
HSD0002464	Inactive Knowledge Author	User Experience	X	Active published knowledge articles are now searched for inactive users
HSD0002473	Targeted Communications-Recipient List needs to be Refreshed	User Experience		Removed logic to check that recipient lists assigned to an active publication has been updated or refreshed
HSD0002513	Service Catalog-Maximum order quantity should not exceed 10	User Experience	X	Improved performance
HSD0002782	HR PDF Template with Published Document	Manageability	X	Improved performance
HSD0002791	Number, Opened, and Opened by should be populated by default scripts	Manageability	X	• Included logic to check if the dynamic filter option is customized • Updated the findings to return only the specific record • Updated recommendation on the detailed action to be taken
HSD0002827	All events should have a description	Manageability		Implemented a simple check for pie.isBaseline()

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Updated definitions (August release) (continued)

Number	Short description	Category	Included in Health Assessment scans	Update description
HSD0002834	The number of rules associated with an order guide should be kept to a minimum	Performance	X	• Updated recommendation verbiage • Added statistic counter
HSD0004580	Knowledge Management Advanced plugin should be active.	User Experience		Improved performance
HSD0004581	Checklist should be configured with each & every Knowledge Base.	User Experience		Improved performance
HSD0004602	Adoption of ATF Quick Start Test 'Communities'	Upgradeability		• Corrected the finding link • Added active check is required in second glide to sys_atf_test table
HSD0004604	Adoption of ATF Quick Start Test 'Customer Service Base Entities'	Upgradeability		• Corrected the finding link • Added active check is required in second glide to sys_atf_test table
HSD0004656	Adoption of ATF Quick Start Test 'Customer Service Management for Orders'	Upgradeability		Improved performance
HSD0004657	Adoption of ATF Quick Start Test 'Customer Service Request Integration'	Upgradeability		Improved performance

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Updated definitions (August release) (continued)

Number	Short description	Category	Included in Health Assessment scans	Update description
HSD0004658	Adoption of ATF Quickstart Test 'CSM Extension for Proxy Contacts'	Upgradeability		Improved performance
HSD0004659	Adoption of ATF Quickstart Test 'Major Issue Management'	Upgradeability		Improved performance
HSD0004660	Adoption of ATF Quickstart Test 'Skill Rule'	Upgradeability		Improved performance
HSD0004973	Check if system property-consumer_max_comments_per_case_daily has been modified for consumer Cases attachment limit	Manageability		• Improved performance • Corrected typo in# short description, description, and recommendation
HSD0006970	Percent of Active Hardware and VM Instance CIs processed via IRE	Manageability		#Improved performance
HSD0010608	Percent of Active HW CIs without Asset linkage	Manageability		Improved performance
HSD0012874	Install Base Items with Business Services	Manageability		Improved performance
HSD0012929	Install Base Items with Application Services	Manageability		Improved performance
HSD0001015	Reports should typically not be made public	Manageability	X	• Enhancement in the query to validate if the system property glide.report.published_reports.e is accounted for before

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Updated definitions (August release) (continued)

Number	Short description	Category	Included in Health Assessment scans	Update description
				reporting a finding • Baseline findings were removed

HealthScan definitions updates: November 2024 release

Some HealthScan definitions are deprecated or updated between releases.

Deprecated definitions

The following definitions have been deprecated for the November 2024 release.

Deprecated definitions (November 2024 release)

Number	Short description	Rating	Related portfolio	Category	Reason for deprecation
HSD0004695	Ensure gamification ranges do not overlap and have a unique start value.	Recommend	Configuration Review for CSM	Manageability	Merged with HSD0004987

Updated definitions

The following definitions have been updated for the November release to improve performance, reduce false positives, and meet the latest coding practices. Some of these definitions will have a positive or negative impact on your customer instance scores.

Due to process and technical constraints, a comprehensive impact analysis for the overall score impact could not be fully conducted for customer instances. As a result, there may be potential impact score drops that have not been identified or addressed.

Updated definitions (November release)

Number	Short description	Rating	Category	Update description
HSD0001041	Customer accounts without primary contact	Discuss	Manageability	• Improved code to follow HealthScan definition guidelines • Documentation link update

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Updated definitions (November release) (continued)

Number	Short description	Rating	Category	Update description
HSD0001058	Scoped app uses logging utils or deprecated methods for logging rather than the verbosity method	Act	Manageability	• Improved performance with more reliance on the database to filter records • Accurate line numbers • Reduced number of false positives
HSD0001128	Client-side code should not use synchronous AJAX methods	Recommend	Performance	• Added query for catalog and client scripts: type! =onSubmit • Implemented updated line numbering and comment handling • Added try/ catch to ensure better stability
HSD0001193	Use the condition field in Business Rules	Discuss	Manageability	Modified the initial query to include "Script not empty" and "when" conditions and removed it from the detailed analysis part of the HSD code
HSD0001459	Missing key contact details - Email or Account	Discuss	Manageability	• Improved code to follow HealthScan definition guidelines • Valid documentation link update

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Updated definitions (November release) (continued)

Number	Short description	Rating	Category	Update description
HSD0001475	Entitlements without duration (start and end date)	Discuss	Manageability	• Improved code to follow HealthScan definition guidelines • Valid documentation link update
HSD0001484	Missing Asset Information - Primary Contact or Location	Discuss	Manageability	• Improved code to follow HealthScan definition guidelines • Valid documentation link update
HSD0001507	A dedicated integration user runs actions in place of the default admin user	Act	Security	• Corrected typo leading all queries on this to fail and return all records • Filtered out tables that don't have a user field available on the form view • Filtered out baseline records • Added query to return the jobs running as admin (without a user value) • Added display on Findings to make this distinction clear • Added 1k Findings limit

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Updated definitions (November release) (continued)

Number	Short description	Rating	Category	Update description
HSD0001533	The default "system" user preference for "rows per page" should be set to 50 or less	Recommend	Performance	• Replaced documentation URL • Always creates a statistic • Added defensive scripting
HSD0001623	Read ACLs (Security rules) should not have GlideRecord, GlideAggregate, or GlideRecordSecure in script	Act	Performance	• Improved code • Avoided use of ScriptUtils performMatch and search override • Fixed incorrect line numbering • Resolved multiple inquiries • Considered GlideRecordSecure in the findings along with GlideRecord and GlideAggregate
HSD0001627	Do not query audit log in custom integrations and code	Recommend	Performance	• Improved performance with more reliance on the database to filter records • Accurate line numbers • Reduced number of false positives
HSD0001662	Differs from baseline: Business Rules	Recommend	Upgradeability	• Excludes custom applications • Queries for customized

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Updated definitions (November release) (continued)

Number	Short description	Rating	Category	Update description
				business rules from store apps • Resolved multiple inquiries • Improved accuracy and performance • Increased the number of findings • Added findings limit and defensive scripting
HSD0001664	Differs from baseline: Script Includes	Recommend	Upgradeability	• Excludes custom applications • Improved performance by not checking twice for baseline
HSD0001665	Differs from baseline: Client Scripts (and UI Scripts)	Recommend	Upgradeability	• Excludes custom applications • Queries for customized client scripts from store apps • Resolved multiple inquiries • Improved accuracy and performance • Increased the number of findings • Added findings limit and defensive scripting

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Updated definitions (November release) (continued)

Number	Short description	Rating	Category	Update description
HSD0001877	Customer Contact should not have the snc_internal role	Act	Manageability	Improved code to follow HealthScan definition guidelines
HSD0002056	Knowledge articles older than 12 months may be unduly aging	Recommend	Manageability	• Added logic to not create the single Finding on zero results • Added try/ catch logic • Added Statistical score for visibility on zero
HSD0002295	Service Contracts without duration (Start and End Date)	Recommend	Manageability	Improved code to follow HealthScan definition guidelines
HSD0002299	Feature adoption: Automated Case Assignment	Recommend	Manageability	Improved code to follow HealthScan definition guidelines
HSD0002300	CSM Demo Data Plugin Installation	Discuss	Manageability	Improved code to follow HealthScan definition guidelines
HSD0002371	Product Adoption: Use CSM to streamline your Customer Service operations	Discuss	Manageability	• Improved code to follow HealthScan definition guidelines • Changed execution type from Statistical to Automated
HSD0002372	Feature Adoption: Self-registration	Discuss	Manageability	Improved code to follow HealthScan

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Updated definitions (November release) (continued)

Number	Short description	Rating	Category	Update description
	for customer contacts			definition guidelines
HSD0002437	Check whether strict mode for GlideRecord queries is active	Recommend	Manageability	Added defensive scripting by means of try/ catch/finally structure to ensure a statistic
HSD0002534	Duplicate Cases created with the same number	Discuss	User Experience	• Improved code to follow HealthScan definition guidelines • Restricted Max finding to 75
HSD0002828	All events should have the "fired by" field populated	Recommend	Manageability	• Returns multiple findings up to a maximum of 1000 • Each finding groups flagged events by application and displays the event count per app • Each finding links to a list page of flagged events for the same application • Returns custom (rather than OOTB) events • Defensive scripting in case of table accessibility issues • Statistic is always returned

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Updated definitions (November release) (continued)

Number	Short description	Rating	Category	Update description
				• Statistic represents the cumulative count
HSD0003784	Check for unhandled duplicate CI tasks	Discuss	User Experience	• Added defensive scripting by means of try/ catch/finally structure to ensure a statistic • Added check for short_description field exists • Migrated to GlideAggregrate for overall count • Added 30 days filter to Findings • Added 1000 Findings limit
HSD0004419	Deactivate stale user accounts	Recommend	Manageability	• Returns finding if 1 or more inactive users are found • Always returns statistic • Filters out users created less than 1 month ago • Defensive scripting in case of issues with tables
HSD0004672	Every Knowledge Base should have Knowledge	Recommend	User Experience	• Improved code to follow HealthScan

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Updated definitions (November release) (continued)

Number	Short description	Rating	Category	Update description
	Manager populated			definition guidelines • Fixed spelling errors
HSD0004689	Enables session caching.	Recommend	User Experience	Improved code to follow HealthScan definition guidelines
HSD0004690	Enables the user-mentions functionality in Communities content.	Recommend	User Experience	Improved code to follow HealthScan definition guidelines
HSD0004692	Enables Google re-CAPTCHA on the self-registration page with Communities	Recommend	Security	Improved code to follow HealthScan definition guidelines
HSD0004693	Enable Gamification on Community	Recommend	User Experience	Improved code to follow HealthScan definition guidelines
HSD0004974	Check if system property sn_customerservice.consumer_max_new_cases_daily has been modified for consumer Cases per day	Recommend	Manageability	Improved code to follow HealthScan definition guidelines
HSD0004987	Ensure gamification has a unique level range name, that gamification ranges do not overlap, and have a unique start value.	Recommend	Manageability	Improved code to follow HealthScan definition guidelines
HSD0005255	Regression testing for ATF Quick Start Test "Major Issue Management"	Recommend	Upgradeability	Improved code to follow HealthScan definition guidelines

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Updated definitions (November release) (continued)

Number	Short description	Rating	Category	Update description
HSD0006666	Check if current.update() is used in a business rule	Act	Performance	• Improved code to follow HealthScan definition guidelines • Resolved multiple inquiries • Rectified incorrect line numbering
HSD0011774	Hardware Models should have Manufacturer and Model Number	Recommend	Manageability	Added a check: If there are 0 models, do not create a finding
HSD0012251	Hardware Asset Tags are unique	Discuss	Manageability	• Updated documentation URL to the latest playbook • Removed finding when there are 0 duplicate asset tags
HSD0014977	GlideRecord.insert() method should check for Null	Recommend	Manageability	• Updated definition with latest comment handling • Added try/ catch • Many performance improvements

HealthScan definitions updates: October 2024 hotfix

Some HealthScan definitions are deprecated or updated between releases.

Updated definitions

Some HealthScan definitions have been updated for the October hotfix to improve accuracy and performance, and reduce the number of false positives to ensure more reliable and precise results.

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Updated definitions (October hotfix)

Number	Short description	Rating	Category	Update description
HSD0001372	Too many fields on a form	Recommend	User Experience	• Set threshold to 75 fields • Out-of-box reporting remains as is • Improved display message in findings • Limited to a max of 1000 findings
HSD0002128	Same field twice on one form	Act	User Experience	• Removed common out-of-boxOB views that appear to be false positives • Improved performance • Limited to a max of 1000 findings

Developer Support

Developer Support is an offering to Advanced and Total Impact packages, and Guided customers who purchase managed support, that provides administrators and authorized users access to a ServiceNow Support Engineer who can assist in troubleshooting technical issues around existing platform customizations.

Many ServiceNow customers operate custom code and configurations. When these customizations break, Developer Support is there to help troubleshoot and debug these customizations.

Named individuals may be designated who have been trained to administer the Subscription Service to request assistance from ServiceNow support engineers in troubleshooting technical issues with existing customizations on the ServiceNow platform.

Note: Up to five individuals may be designated with the Advanced package, and up to ten individuals may be designated with the Total package.

Who to contact

There are several stages in the custom code end-to-end development lifecycle. Each of these stages allow for different levels of support that require assistance from specific ServiceNow teams.

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Custom code end-to-end-lifecycle

Custom code lifecycle	Use cases	Delivered by
Design review	1. Help me with a design review for manageability, performance, and upgradability 2. Help to determine what is the right base system tool to use for my given objective 3. Help me plan the right architecture	Platform Architect
Code review	Help to debug a pre-scoped / pre-designed customization that isn't working as expected	Expert Services
Development support	Help to fix my custom code after it breaks	Developer Support

In scope use cases

Many use cases are supported by Developer Support:

- Break-fix troubleshooting or adjusting existing customizations
- Questions on the ServiceNow APIs

Exclusions

Some use cases are not supported by Developer Support:

- New Implementation of the product, such as initial implementation or new product implementation
- Customizations that break after a ServiceNow family upgrade. Customer customizations are not backward compatible and should be developed against the latest released code.

  Note: Reach out to Now Support to understand if there are any changes in the ServiceNow base system APIs.

- Testing (UAT, load, regression, performance)
- Building and designing net new features and enhancements, such as new requirement analysis and design, or new coding queries
- When related to integrations, excludes:
  - Understanding how parsing data will affect a customer's business process
  - Knowledge of 3rd party systems involved in integration
  - Scripts to retrieve content from external sources
  - Integrations that are not possible due to ServiceNow API limitations

Using Developer Support

Learn more about using Developer Support and helpful information when submitting a developer request with Impact.

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Developer Support Boundaries

General

Developer Support is available Monday – Friday, 09:00 – 17:00, based on the local time zone of the case communication.

- Cases are opened with P3 priority, and aren't eligible for escalation. For more information on response time and SLA, see https://support.servicenow.com/kb?id=kb_article_view&sysparm_article=KB0547260.
- Developer Support cases are investigated on a subprod instance. All issues must be reproducible on a subprod instance.
- Available to self-hosted customer instances via a modified delivery model.

Note: Developer Support isn't currently available in the Australia IRAP-Protected datacenters or in certain other restricted environments.

Parameters

There are certain parameters to consider when submitting a Developer Support case, as described in the following sections.

Users:

- The named contact is responsible for ensuring that each case opened describes a specific issue and that the section of code referenced is isolated to a narrow band of code not to exceed 200 lines.
- Available to the number of designated users per Impact Package subscription (not including customer system administrators):
  - Five for Advanced Impact package
  - Ten for Total Impact package

Note: See Manage Developer Support user access to designate users.

Infrastructure:

- Supported version(s) of the release/feature/application/hardware are required
- English is the only supported language
- Troubleshooting or debug of third-party applications or assessment of security vulnerabilities are not included

Integrations:

Integration support is only performed within a ServiceNow instance or infrastructure and includes:

- Questions on ServiceNow APIs
- Scripts to consume the data from the integration (only if the data is imported as expected)
- Transform Map scripts

Create a Developer Support case

Enter a support case to engage Developer Support assistance, if you are a named contact on the Impact plan.

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Before you begin
Role required: Impact Developer Support

Procedure

1. Navigate to **Impact** > **NowSupport**.
   You may also navigate directly to NowSupport.
2. Select **Create a Case**.
3. Select the Case Type **Developer Support**.
   Only users whose customer_admin has assigned them the correct role will be able to see this Premium Developer Support tile on new case creation.
4. Review the Developer Support guidelines and acknowledge with the check box.
5. On the Detail Capture Page, enter the **Subject**, **Description**, and **Steps to reproduce**.
6. Confirm your contact information and your best available time.
7. Confirm the referred instance ID.
8. Select **Confirm and Submit** to submit the case.
   Once case is created and a case number is generated, you may add additional authorized users on the account to the watch list, further comments, and attachments.

Manage Developer Support user access

Add designated users to enter a support case for Developer Support. The named contacts are responsible for entering details about a specific issue.

Before you begin
Role required: Impact admin

Procedure

1. Navigate to **Impact** > **Company Profile**.
2. From the **Actions** menu, select **Update role/access**.
   If the user is not listed in the table, create a new user. See Manage Impact users for details.
3. Select the **Action** icon on the right of the user.
4. Choose **Update role/access**.
5. Under Premium access, select **Developer Support**.
   The number of available users is displayed next to the assignment field.
6. Select **Submit**.

What to do next
Review Developer Support access and how many users are available.

1. Navigate to your name in the top right corner of the Impact Delivery Instance.
2. Select **Company profile** from the drop down.
3. Under Developer Support, you will see how many users are available.

Proactive Code Check for the Impact Store Application

Developers scan update sets for leading practice violations in non-production instances before promoting to production and Platform Owners gain insight into technical debt and stability of both non-production and production instances, resulting in improved code quality, reduced errors, and compliance verification.

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Proactive Code Check key features

Note: Starting with Impact Zurich version 6.0.8 ServiceNow Store release, Proactive Code Check is being prepared for future deprecation. It will be hidden and no longer installed on new instances but will continue to be supported. For details, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

Proactive Code Check can be used to perform a code review in your instances.

Important: Proactive Code Check single instance scanning is supported with the ServiceNow Washington DC release and later. Synchronizing between instances and viewing results on the dashboard are features supported with the ServiceNow Yokohama release and later.

Update set scanning

- Scans code and configuration changes against predefined ServiceNow leading practices and compliance standards for the specific update set.
- Detects security vulnerabilities, performance issues, and coding inefficiencies early in the development lifecycle.
- Improve code quality, reduce errors, and verify compliance before promoting to production.

Real-time feedback

- Provides actionable insights and recommendations for resolving identified issues.
- Delivers results in real time, enabling developers to address problems without delays.

Instance-specific integration

- Scans run directly within your instance, ensuring data security and compliance.
- Findings are saved locally for easy access and reporting.

Comprehensive reporting

- Findings are categorized by priority, allowing users to focus on critical issues.
- Reports include trend analysis and delta comparisons to track improvement over time.
- Gain insight into technical debt and the stability of instances to easily monitor the status of issue remediation efforts using performance reports

Synchronize scan results to production

Code review reports on update sets in non-production instances can be synced for review in a configured production instance

View scan results on the Platform Health dashboard

Proactive Code Check scan categories

Proactive Code Check performs leading practice checks related to the categories in the following table.

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PCC scan categories

Category	Description
Manageability	Measures the extent to which ServiceNow instances, applications, or infrastructure can be effectively upgraded, monitored, and maintained.
Performance	Measures the efficiency of a ServiceNow instance, encompassing aspects such as speed, responsiveness, resource utilization, and overall dependability.
Security	Measures implementation of protocols across a ServiceNow instance to prevent unauthorized access, data breaches, cyber attacks, and potential vulnerabilities.
Upgradeability	Assesses the ease of enhancing a ServiceNow instance or application with new features, improvements, security patches, or compatibility adjustments.

Note: For the complete list checks performed by a Proactive Code Check scan, see Proactive Code Check scan suite matrix for the Impact Store Application.

Use Proactive Code Check for the Impact Store Application

Developers can identify issues and prevent defects before they are deployed to production.

Before you begin

Note: Starting with Impact Zurich version 6.0.8 ServiceNow Store release, Proactive Code Check is being prepared for future deprecation. It will be hidden and no longer installed on new instances but will continue to be supported. For details, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

Developers execute Proactive Code Check (PCC) on update sets in development in non-production instances. PCC displays a list of identified findings for the update set related list with details such as type, severity, and location. Filters and sorting options for the findings are available, also the ability to directly open the individual finding record to resolve the issues found in the scan report.

Note: The code check parameters must be configured prior to running a scan.

Role required: admin

Procedure

1. In the non-production instance, navigate to **All** > **System Update Sets** > **Local Update Sets** > **.**
   Verify that the page view is set to **Proactive Code Check**.
   The Customer Updates tab displays the pending development changes to be pushed to the production instance.
2. Select the **Proactive Code Check** UI action to initiate the scan.
   A progress bar displays that also includes the total number of warnings, errors, and findings.
3. Select **Go to Result/Refresh** the current update set form to view findings#n the related list.
   The Scan Findings are displayed in a table. You can review the system check for background information for a particular result or link externally to a KB article that explains resolution and configuration details.
4. Address the issues that were reported during the scan to validate the changes resolved the issues.
5. On the update set, select **Rescan** on the Scan Result page for an updated report.

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Repeat the scan and resolution process, as needed, before promoting the Update Set to the production instance.
New findings are referenced to the specific Update Set from which they originated, including findings related to child update sets, allowing for easy navigation between findings and the update set in the user interface.

Proactive Code Check analytics for the Impact Store Application

Platform Owners use Proactive Code Check to track compliance against coding best practices and organizational standards. Owners can review detailed findings and audit the status of issues that were uncovered during the scan. Historical data is available up to six months.

About this task

Note: Starting with Impact Zurich version 6.0.8 ServiceNow Store release, Proactive Code Check is being prepared for future deprecation. It will be hidden and no longer installed on new instances but will continue to be supported. For details, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

- Identify recurring issues and trends in unresolved findings.
- View progress on resolving technical debt over time.
- Prioritize remediation efforts using a severity-based categorization of findings.

Before you begin

Role required: Impact_platform_owner, sn.mif_mif_read

Procedure

1. Navigate to **All** > **Impact** > **Platform health** > **Diagnostics**.
   The Proactive Code Check overview displays with data from the last 30 days.
2. Select **View Dashboard** to view additional information about the scans.
   - Filter by instances or by time period.
   - The Prevented findings charts display metrics related to findings that were resolved prior to moving an update set to a production completed status.
   - The Unresolved findings section displays metrics related to findings that remained open after an update set was moved to a production completed status.
   - Compare Trends in Resolved vs. Unresolved Findings.
3. Select **View all findings** to view all findings related to Proactive Code Check.
   - View All Findings Across Instances.
   - Filter and Group Findings by Severity, Type, or Check.
   - Identify Checks Producing the Most Findings for Targeted Improvements.
   - Analyze Findings Across Time Periods to Track Trends and Recurring Issues.

Findings count and state across time periods

Findings category	State
Count of Findings (Findings Resolved)	Muted and Created on Today
Count of Findings Unresolved	Recurring or New and Updated on Today
Count of Findings Resolved	Resolved and Updated on Today

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Findings category	State
Count of Findings New	New and Updated on Today
Count of Findings Muted	Muted and Updated on Today

Proactive Code Check scan suite matrix for the Impact Store Application

Refer to the Proactive Code Check (PCC) scan suite matrix for details on the checks performed during a PCC scan.

Note: Starting with Impact Zurich version 6.0.8 ServiceNow Store release, Proactive Code Check is being prepared for future deprecation. It will be hidden and no longer installed on new instances but will continue to be supported. For details, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

Proactive Code Check scan suite matrix

Category	Name	Short_description	Description
Performance	HSD0001049 Avoid Global UI Scripts	Avoid Global UI Scripts	Global UI scripts are loaded on every single page/form in ServiceNow even if the code within them is not called.
Manageability	HSD0001058 SCRIPT Scoped app uses logging utils or deprecated methods	Scoped app uses logging utils or deprecated method - gs.log	Scoped applications should use scoped logging APIs rather than legacy methods.
Manageability	HSD0001058 XML Scoped app uses logging utils or deprecated methods	Scoped app uses logging utils or deprecated method - gs.log	Scoped applications should use scoped logging APIs rather than legacy methods.
Performance	HSD0001116 Client Scripts should not be defined against the Global table	Client Scripts should not be defined against the Global table	A global client script is any client script where the selected Table is Global. Global client scripts have no table restrictions; therefore they will load on every page in the system introducing browser load delay in the process. There is no benefit to loading this kind of scripts on every page.
Performance	HSD0001126 SCRIPT Unnecessary dot walking to sys_id from current object	Unnecessary dot walking to sys_id from current object	Reference fields already store the Sys ID of the referenced record. Using gr.fieldname.sys_id is a dot-walk and instructs the platform to perform another query only to return the same value. This is an unnecessary overhead.

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Proactive Code Check scan suite matrix (continued)

Category	Name	Short_description	Description
Performance	HSD0001126 XML Unnecessary dot walking to sys_id from current object	Unnecessary dot walking to sys_id from current object	Reference fields already store the Sys ID of the referenced record. Using gr.fieldname.sys_id is a dot-walk and instructs the platform to perform another query only to return the same value. This is an unnecessary overhead.
Performance	HSD0001128 SCRIPT Client-side code should not use synchronous AJAX methods	Client-side code should not use synchronous AJAX methods	Code that uses synchronous AJAX can possibly cause delays in processing UI events. It can be detrimental to performance and negatively impact user experience. Wherever possible, we should try to employ asynchronous AJAX.
Upgradability	HSD0001142 SCRIPT Client-side code should not use DOM manipulation technique	Client-side code should not use DOM manipulation technique	This customization technique gives a lot of control, but does frequently cause upgrade challenges. It is recommended not to use jQuery, PrototypeJS, gel and other techniques.
Manageability	HSD0001153 SCRIPT Hard coded instance URL	Hard coded instance URL	Raises a finding for hard coded instance URLs as their use can be detrimental to functionality across environments.
Manageability	HSD0001153 XML Hard coded instance URL	Hard coded instance URL	Raises a finding for hard coded instance URLs as their use can be detrimental to functionality across environments.
Manageability	HSD0001174 REST Scripted Web Services writing data directly	Scripted Web Services writing data directly	Scripted Web Services insert/update/delete data directly, whereas it is recommended to utilize Script Includes because it provides a structured and documented approach for managing data operations, ensuring consistency, security, and maintainability within the platform.

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Proactive Code Check scan suite matrix (continued)

Category	Name	Short_description	Description
Manageability	HSD0001174 SOAP Scripted Web Services writing data directly	Scripted Web Services writing data directly	Scripted Web Services insert/update/delete data directly, whereas it is recommended to utilize Script Includes because it provides a structured and documented approach for managing data operations, ensuring consistency, security, and maintainability within the platform.
Security	HSD0001235 XML Avoid Dynamic JEXL Expressions inside Jelly tag	Avoid Dynamic JEXL Expressions inside Jelly tag	When writing Jelly code, avoid using dynamic JEXL expressions inside the Jelly tag (or <g2:evaluate> for phase two). While the code appears to work, it affects a memory resource (called PermGen) in the Java Virtual Machine, which can lead to performance issues and even system outages over time. The exception to using JEXL expressions inside <g:evaluate> tags is with static values, including: ${AMP}\, ${AND}, ${GT}, ${LT}, and ${SP} (and their phase two counterparts: $[AMP], $[AND], and so on).
Upgradability	HSD0001247 Use of deprecated API RESTMessage (V1)	Use of deprecated API RESTMessage (V1)	The API allowed to send outbound REST messages using JavaScript. However the version 1 of RESTMessage has been deprecated.
Manageability	HSD0001275 Scripts should not contain hard-coded IDs	Scripts should not contain hard-coded IDs	Hard coding sys_ids makes the system more difficult to manage, and less able to move functionality between instances.
Manageability	HSD0001278 Before Business Rules should not update() or insert() on other tables	Before Business Rules should not update() or insert() records on other tables	Running an insert() or update() in a onBefore BR will cause updates to other tables, even though the update may be cancelled.

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Proactive Code Check scan suite matrix (continued)

Category	Name	Short_description	Description
Manageability	HSD0001281 getMessage() called in Client Script without preloading message key	getMessage() called in Client Script without preloading message key	getMessage used in a client script needs to have the message key added to the Messages field on the script record.
Manageability	HSD0001312 SCRIPT Avoid console.log() usage in code	Code should not contain the console.log() debugging method	The client-side function console.log could cause errors in certain browser versions. Furthermore, there is a good chance that what's being logged is information you would not want publicly exposed, and that persons with malicious intent could manipulate the script to reflect PII. It is never a good idea to go to production with console logging enabled. Console.log is invalid server side and therefore should not be there either.
Manageability	HSD0001312 XML Avoid console.log() usage in code	Code should not contain the console.log() debugging method	The client-side function console.log could cause errors in certain browser versions. Furthermore, there is a good chance that what's being logged is information you would not want publicly exposed, and that persons with malicious intent could manipulate the script to reflect PII. It is never a good idea to go to production with console logging enabled. Console.log is invalid server side and therefore should not be there either.
Performance	HSD0001338 Business Rules should not be defined on the Global table	Business Rules should not be defined on the Global table (Global Business Rule)	A Global Business Rule is any Business Rule where the selected table is Global. Any other script can call Global Business Rules. Global Business Rules have no condition or table restrictions and load on every page in the system.

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Proactive Code Check scan suite matrix (continued)

Category	Name	Short_description	Description
Performance	HSD0001347 SCRIPT Client-side code should not use GlideRecord	Client-side code should not use GlideRecord	The client side GlideRecord object is often inefficent, because it returns lots of unecessary data. GlideRecord and g_form.getReference are both involved.
Performance	HSD0001358 SCRIPT Server-side code should not use GlideRecord.getRowCount()	Server-side code should not use GlideRecord.getRowCount() to count records	The GlideRecord.getRowCount() works by getting the whole result set without using the build-in arithmetic functions of the database. GlideAggregate does use the database, therefore is often drastically faster. The exception to this recommendation is if you intend to loop through the records and process them anyway.
Performance	HSD0001358 XML Server-side code should not use GlideRecord.getRowCount()	Server-side code should not use GlideRecord.getRowCount() to count records	The GlideRecord.getRowCount() works by getting the whole result set without using the build-in arithmetic functions of the database. GlideAggregate does use the database, therefore is often drastically faster. The exception to this recommendation is if you intend to loop through the records and process them anyway.
Manageability	HSD0001392 Scripts should not use the eval() method	Scripts should not use the eval() method	The eval() function evaluates or executes an argument. Improper use of eval() opens up your code for injection attacks and debugging can be more challenging, as no line numbers are displayed with an error.
Performance	HSD0001554a JDBC Data Srcs with "Use last run datetime" disabled for update sets	JDBC Data Sources should have the "Use last run datetime" option check	Repeatedly importing data that has not changed leads to many skipped rows and unnecessarily bounds system resources.

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Proactive Code Check scan suite matrix (continued)

Category	Name	Short_description	Description
Performance	HSD0001560 Use 'track by' in ngRepeat loops	Use 'track by' in ngRepeat loops	When using the ngRepeat directive without a 'track by' clause, the DOM elements are destroyed and rebuilt every time the source data is updated. Adding a 'track by' clause with a unique key (such as a sys_id) allows the DOM elements to be reused rather than rebuilt, which significantly improves the performance of pages with large, complex lists.
Manageability	HSD0001578 Business Rules should not use the SOAP getResponse() method	Business Rules should not use the SOAP getResponse() method	getResponse blocks the transaction, waiting until a response is received. This is better done asynchronously.
Performance	HSD0001623 Read ACLs (Security rules) should not have GlideRecord/ GlideAggregate	Read ACLs (Security rules) should not have GlideRecord/ GlideAggregate	Read ACLs are frequently executed. Having complex database lookups can harm performance.
Security	HSD0002016 Server scripts in widgets should use GlideRecordSecure	Server scripts in widgets should use GlideRecordSecure instead of GlideRecord	The best practice should be that server scripts in widgets should use GlideRecordSecure rather than GlideRecord. This is to ensure that security ACLs are considered in all server interactions. To detect deviation from this, any instantiation of GlideRecord should be marked as a finding. Note that $sp.getRecord() currently returns a GlideRecord object. This call should actually return a GlideRecordSecure object to be as secure as possible. While that is a separate enhancement outside of the HealthScan tool, it does pose a challenge in that it will be harder for HealthScan to detect the use of the GlideRecord

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Proactive Code Check scan suite matrix (continued)

Category	Name	Short_description	Description
			object returned by $sp.getRecord.
Performance	HSD0002144 Leverage c.server.get() for better widget performance	Leverage c.server.get() for better widget performance	On the client script, c.server.get() allows you to pass specific data to the server script. Doing this can have performance improvements over c.server.update(), which sends the entire data object.
Performance	HSD0002150 Remove unused services from widget client script.	Remove unused services from widget client script.	If injected services are not used in a widget's client controller script, consider removing them. Services which are injected and not used will be instantiated, which may have a performance impact. It is also good practice from a code readability perspective to only inject services that are required.
Performance	HSD0002154 Don't use $rootScope.$on in a widget's client script.	Don't use $rootScope.$on in a widget's client script.	$rootScope.$on should only be used in a service. Using event listeners on $rootScope in a widget's client controller script can cause memory leaks if the listeners are not manually destroyed. Every time a widget is loaded, the controller is initialized, and every listener initialized on the $rootScope will not be destroyed with the controller, unless done so manually. Services have no other alternative but to fire events on $rootScope, and the listen for events on $rootScope. This is because services are initialized once across the app and do not have their own scope. It is okay to

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Proactive Code Check scan suite matrix (continued)

Category	Name	Short_description	Description
			use $rootScope.$on in a service.
Manageability	HSD0002808 Client Scripts without description	Client Scripts without description	Client Scripts where the description is either empty, very short or the same as the script name.
Manageability	HSD0002808 Script Includes without description	Script Includes without description	Script Includes where the description is either empty, very short or the same as the script name.
Manageability	HSD0002827 All events should have a description	All events should have a description	All custom events in the event registry should have the "description" field populated. This will ensure that the event's purpose is easily identifiable by administrators who did not create the registry entry and improve maintainability of the instance.
Manageability	HSD0002828 All events should have the "fired by" field populated	All events should have the "fired by" field populated	All custom events in the event registry should have the "fired_by" field populated. This will ensure that the event's trigger is easily identifiable by administrators who did not create the registry entry and improve maintainability of the instance.
Manageability	HSD0003076 Basic authentication credentials on SOAP Message definition	Basic authentication credentials on SOAP Message definition	Basic Authentication for outbound SOAP Messages should use Basic Auth Profiles instead of putting the credentials on the function definition itself.
Manageability	HSD0003081 Basic authentication credentials on REST Message definition	Basic authentication credentials on REST Message definition	Basic Authentication for outbound REST Messages should use Basic Auth Profiles instead of putting the credentials on the function definition itself.
Upgradability	HSD0003307 Change Request table should not be extended	Change Request table should not be extended	At least one child table extending Change Request has been created.

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Proactive Code Check scan suite matrix (continued)

Category	Name	Short_description	Description
			Extending Change Request with custom child tables should not be done: • To support a custom Change Request table a high amount of customization to the other ITSM processes is required • New functionality in future releases might not work on extended tables or would require further customization
Manageability	HSD0003625 Business Rule script should be encapsulated in executeRule function	Script code in Business Rules should be encapsulated in the executeRule function	The code should check if there is any business rule that have some code that is not encapsulated in the executeRule function.
Upgradability	HSD0004147 Use of GlideDialogWindow and GlideOverlay	Use of GlideDialogWindow and GlideOverlay	Checks for the use of GlideDialogWindow and GlideOverlay, which cannot be tested by ATF.
Performance	HSD0004365 SCRIPT Cache flushed as part of scripts	Cache flushed as part of scripts	If a cache flush is triggered as part of a non-ootb script execution this will require the platform to rebuild the cache before returning to its BAU state. This activity has a significant performance impact.
Performance	HSD0004726 SCRIPT Debugger should not be used in scripts	Debugger should not be used in scripts	The debugger statement is used to tell the executing JavaScript environment to stop execution and start up a debugger at the current point in the code. This has fallen out of favor as a good practice with the advent of modern debugging and development tools. Production code should definitely not contain debugger, as it will cause the browser to stop executing code and open an appropriate debugger.

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Proactive Code Check scan suite matrix (continued)

Category	Name	Short_description	Description
Performance	HSD0006666 Check if current.update() is used in a business rule	Check if current.update() is used in a business rule	Current.update() used in a business rule causes recursive updates and can significantly impact performance.
Manageability	HSD0013213 SCRIPT Detecting hard-coded strings in addInfoMessage() usage	Detecting hard-coded strings in addInfoMessage() usage	Hard-coded messages/ strings in the code will not be localized. Detecting such occurrences in addInfoMessage() on both the client and server side.
Manageability	HSD0013213 XML Detecting hard-coded strings in addInfoMessage() usage	Detecting hard-coded strings in addInfoMessage() usage	Hard-coded messages/ strings in the code will not be localized. Detecting such occurrences in addInfoMessage() on both the client and server side.
Manageability	HSD0013215 SCRIPT Detecting hard-coded strings in alert() usage	Detecting hard-coded strings in alert() usage	Hard-coded messages/ strings in the code will not be localized. Detecting such occurrences in alert() on the client side.
Manageability	HSD0013215 XML Detecting hard-coded strings in alert() usage	Detecting hard-coded strings in alert() usage	Hard-coded messages/ strings in the code will not be localized. Detecting such occurrences in alert() on the client side.
Manageability	HSD0014228 SCRIPT Detecting hard-coded strings in addErrorMessage() usage	Detecting hard-coded strings in addErrorMessage() usage	Hard-coded messages/ strings in the code will not be localized. Detecting such occurrences in addErrorMessage() on both the client and server side.
Manageability	HSD0014228 XML Detecting hard-coded strings in addErrorMessage() usage	Detecting hard-coded strings in addErrorMessage() usage	Hard-coded messages/ strings in the code will not be localized. Detecting such occurrences in addErrorMessage() on both the client and server side.
Manageability	HSD0014229 SCRIPT Detecting hard-coded strings in setError() usage	Detecting hard-coded strings in setError() usage	Hard-coded messages/ strings in the code will not be localized. Detecting such occurrences in setError() on the server side.
Manageability	HSD0014229 XML Detecting hard-coded strings in setError() usage	Detecting hard-coded strings in setError() usage	Hard-coded messages/ strings in the code will not be localized. Detecting

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Proactive Code Check scan suite matrix (continued)

Category	Name	Short_description	Description
			such occurrences in setError() on the server side.
Manageability	HSD0014231 SCRIPT Detecting hard-coded strings in confirm() usage	Detecting hard-coded strings in confirm() usage - SCRIPT	Hard-coded messages/ strings in the code will not be localized. Detecting such occurrences in confirm() on the client side.
Manageability	HSD0014231 XML Detecting hard-coded strings in confirm() usage	Detecting hard-coded strings in confirm() usage - XML	Hard-coded messages/ strings in the code will not be localized. Detecting such occurrences in confirm() on the client side.
Manageability	HSD0014232 SCRIPT Detecting hard-coded strings in prompt() usage	Detecting hard-coded strings in prompt() usage	Hard-coded messages/ strings in the code will not be localized. Detecting such occurrences in prompt() on the client side.
Manageability	HSD0014232 XML Detecting hard-coded strings in prompt() usage	Detecting hard-coded strings in prompt() usage	Hard-coded messages/ strings in the code will not be localized. Detecting such occurrences in prompt() on the client side.
Manageability	HSD0014233 SCRIPT Detecting hard-coded strings in addMessage() usage	Detecting hard-coded strings in addMessage() usage	Hard-coded messages/ strings in the code will not be localized. Detecting such occurrences in addMessage() on the server side.
Manageability	HSD0014233 XML Detecting hard-coded strings in addMessage() usage	Detecting hard-coded strings in addMessage() usage	Hard-coded messages/ strings in the code will not be localized. Detecting such occurrences in addMessage() on the server side.
Manageability	HSD0014234 SCRIPT Detecting hard-coded strings in addFormMessage() usage	Detecting hard-coded strings in addFormMessage() usage	Hard-coded messages/ strings in the code will not be localized. Detecting such occurrences in addFormMessage() on the client side.
Manageability	HSD0014234 XML Detecting hard-coded strings in addFormMessage() usage	Detecting hard-coded strings in addFormMessage() usage	Hard-coded messages/ strings in the code will not be localized. Detecting such occurrences in addFormMessage() on the client side.

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Proactive Code Check scan suite matrix (continued)

Category	Name	Short_description	Description
Manageability	HSD0014544 SCRIPT Detecting hard-coded strings in addWarningMessage() usage	Detecting hard-coded strings in addWarningMessage() usage	Hard-coded messages/ strings in the code will not be localized. Detecting such occurrences in addWarningMessage() on both the client and server side.
Manageability	HSD0014544 XML Detecting hard-coded strings in addWarningMessage() usage	Detecting hard-coded strings in addWarningMessage() usage	Hard-coded messages/ strings in the code will not be localized. Detecting such occurrences in addWarningMessage() on both the client and server side.

Overview of Instance Observer

Instance Observer (IO) is an observability and performance monitoring tool that empowers you to track your instance health and performance in near real-time, while also providing historical insights.

IO helps Instance administrators, Platform Owners, and DevOps teams accelerate value and drive their desired business outcomes by increasing visibility into instance performance, helping customers push innovation with speed and confidence.

Features and Benefits

Key features

- **24/7 Monitoring:** Instance performance monitoring provides awareness of issues within an instance before end users#are impacted.
- **24/7 Alerting:** Set up custom alerts to notify you when specific thresholds are crossed, so you can act before an issue becomes critical.
- **Multi-instance Availability:** Proactively visualize performance#telemetry across instances. Empowering#organizations to identify trends before#end users are impacted.
- **Triage:** Actionable point-in-time#nstance metadata providing additional#context to instance performance and accelerating troubleshooting.
- **Off Instance Application:** Access to instance performance#telemetry off instance. When an#ssue does arise, organizations can#access actionable data independent of#nstance availability.
- **Reporting:** Visualize instance performance#telemetry over time and quickly generate reports to share with your business stakeholders, enabling organizations to manage instance performance faster, smarter, and better.
- **Analytics:** Compare metrics over time to see how performance is trending in general or to assess the before and after impacts of certain changes.

Key Benefits

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- **24/7 availability:** Instance Observer is an off-instance, cloud-based application enabling customers to visualize instance telemetry across instances in a single application.
- **Improve Instance performance:** By monitoring instance performance metrics in real time, you can quickly identify and resolve issues that might be causing poor performance impacting end users.
- **Increase uptime:** Proactive monitoring through Instance Observer alerting you can be notified of potential issues before they cause downtime, enabling you to act before it affects your users.
- **Improve troubleshooting:** When issues do arise, have actionable point-in-time metadata accelerating root cause analysis and time to relief.
- **Remove distractions:** With near real-time data at your fingertips, you and your team can spend less time trying to find the information you need and more time driving your desired business outcomes

Note: Instance Observer is not available with ServiceNow® mobile, however, may be accessed with a browser on your mobile device.

Instance Observer features

Feature and description

Feature	Description
Instance Observer user configurable dashboard	Provides a snapshot of the overall health of your instance.
Performance	Overviews Instance Health and Performance Metrics, and enables drill down into specific datasets with recommended troubleshooting.
Availability	View live Instance Availability status tied to ServiceNow#monitoring— Up/Down Status
Key alerts – activation and notifications	Flexibility to set alerts with thresholds specific to your business needs, and configure who on your team receives notifications and the method.
Analytics	View comparisons for performance of key metrics over time.
Triaged instance data	Point-in-time instance snapshot providing metadata to troubleshoot live issues
Instance performance telemetry reports	Quickly generate reports to download and share with your team business stakeholders.
Help	Get assistance with Instance Observer tools, terminology review, how-to videos, and relevant documents.

Support matrix according to Impact package

Some Instance Observer reporting features vary between the Impact packages that you're subscribed to. Reference the support matrix chart or contact your account team for more information.

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- ✓ = Supported
- X = Not supported

Instance Observer features by package

Feature	Guided	IO features add-on	Total	IO seats add-on
	5 users		10 users	10 users
User configurable dashboard For more information, see Instance Observer user configurable dashboard.	#		#	
Performance: KPI visualization For more information, see Performance.	#		#	
Performance: Root cause analysis (Root cause correlation, Root cause summarization, and Root cause remediation) (Generative AI) For more information, see Generative AI powered Root cause analysis.		#	#	
Performance: Anomaly detection (AI) For more information, see Anomalies detection		#	#	
Performance: Lookback date range	45 days	6 months	6 months	

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Instance Observer features by package (continued)

Feature	Guided	IO features add-on	Total	IO seats add-on
Availability: Instance availability For more information, see Instance Availability.	#		#	
Availability: Known issues	#		#	
Alerts: Alert console For more information, see Availability.	#		#	
Alerts: Configure alerts For more information, see Configure Key Alerts.	Starter alert types and conditions	All alert types and conditions	All alert types and conditions	
Alerts: Configure notifications For more information, see Instance Observer Notifications.	# (Email, SMS, ServiceNow, third-party integrations). Unlimited notifications		# (Email, SMS, ServiceNow, third-party integrations). Unlimited notifications	
Alerts: Root cause analysis history For more information, see Use the Root cause analysis history.		#	#	
Analytics: Compare datasets		#	#	
Analytics: Top transactions		#	#	
Analytics: Query patterns		#	#	

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Instance Observer features by package (continued)

Feature	Guided	IO features add-on	Total	IO seats add-on
Analytics: User experience For more information, see User Experience.		#	#	
Triage For more information, see Triage a ServiceNow instance.	# (10 per day per user per instance)		# (10 per day per user per instance)	
Reports: On demand For more information, see Instance performance telemetry reports.	# (Daily Performance Metrics Report, Custom Performance Report, Database Growth Report, Encryption Report)	Performance Trends Report	# (also get Performance Trends Report)	
Reports: Scheduled	#		#	
Reports: Lookback date range	45 days	6 months	6 months	

To access the Instance Observer page, navigate to **Impact** > **Platform Health** > **Monitor** > **Instance Observer**.

Note: For more information on subscription support, see Impact packages.

Serviceability limitations

Note: Instance Observer is available for customers in Commercial and Government Community Cloud (GCC) environments. IO is currently not available in other regulated or on-premise environments.

Instance Observer is applicable or available for ServiceNow Platform instances only.

Instance Observer user configurable dashboard

You can create your own dashboard according to your preferences for metrics that help you to analyze the health of your system in a snapshot.

The default base system dashboard, the All instance health dashboard, is the Instance Observer default home page that provides a snapshot of the overall health of your instances with key insights, such as performance, reliability, and availability at a glance with the following widgets:

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- Instance availability: The availability across all instances
- Alerts: The alerts for that account for the last 24 hours
- Open cases: All open cases for that account
- Performance insights: The customizable widget gives the performance insights that are updated every 15 minutes.
- Known Issues (ePRBs): All known issues with ServiceNow
- Clusters: Cluster details of all instances in the account
- KPIs: Important KPIs for all instances of the account

You can select the auto-refresh frequency for the dashboard.

Note: The All Instance health dashboard isn't editable, deletable, or cloneable. Create a fresh dashboard to explore configuration options. See Create a dashboard for more information.

Create a dashboard

Create a dashboard that serves as a home page to assess the health of your instances at a glance.

Before you begin

Role required: IO provisioned user

Procedure

1. Navigate to **Impact** > **Platform Health** > **Monitor** > **Instance Observer** > **Dashboard** > **+Create new dashboard**.
2. On the form, fill in the fields.

Create new dashboard form

Field	Description
Name	Required unique name for the dashboard.
Description	Enter a description for the dashboard, keeping in mind this may be a shared dashboard.
Instance	Required to select production and non-production instances to be included on the dashboard.
Publish settings	Required field: ○ Private: Only visible to you ○ Public: Visible to all users in your organization
Preferences	Select as the default dashboard to make this dashboard as the new homepage when launching Instance Observer. Default preferences are at the user level only.

3. Select **Create**.
4. Select **Add Widget**.

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- Custom: Select custom to add your choice of metric, widgets, and aggregation. Note: Categories are equivalent to the pages available in the Performance section.
- Out of the box: Choose from pre-defined widgets available on the base system dashboard to display. Depending on the selected category, the widget varies. These widgets are available for all instances of the account irrespective of the instances selected for the customized dashboard.

Three widget types are supported:

- Table Data: Data added in tabular form
- Time Series: Data for the selected time period displayed in line charts
- KPIs: Key Performance Indicators for all important metrics with your choice of aggregation

5. Select the **Category** for the widget.
6. Add additional widgets to the custom dashboard.
7. **Optional:** Select the gear icon on a widget to Edit or Delete a widget.
   A delete confirmation will display before removing the widget.
8. Exit the Edit Dashboard mode to view the dashboard.
   Users can perform additional actions for dashboards:
   - Select the time period and refresh frequency for the dashboards.
   - Share a public dashboard's link with other users in their organization.
   - Zoom the dashboard on their monitor where in the dashboard will be refreshed automatically in the background
   - From the gear icon on the dashboard users can perform the following actions:
     - Settings: Change name, description, instances, share settings, and set the dashboard as default if needed.
     - Clone: Clone a custom dashboard to use as a baseline for a new dashboard.
     - Delete: Delete a dashboard, if required. Deleted dashboards will move under the Manage dashboard section and will be available for restoration for 7 days. When a customized dashboard that was set as default is deleted, the out-of-the-box dashboard will automatically become your default dashboard.
     - Manage Dashboard: Lists all dashboards created by the logged in user, shared with the user, and deleted dashboards.

For more information, see Performance insights in user-configurable dashboard.

Performance insights in user-configurable dashboard

The Performance insights widget in the user-configurable dashboard displays the total production instances, their count, and the status of their performance score in a dial component.

Important: Performance insights of the instances as a feature are available to Total customers only, and both in the regulated and non-regulated markets. Consequently, the ML model deduces and sends the data to the back end if you're a Total tier customer and your instances have at least four weeks of data.

The performance summary of the instances as a feature exists in the:

- User configurable dashboard
- Customizable widget that you can add on the dashboard
- Analytics page

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Performance insights widget in the user-configurable dashboard

The ML model fetches these data and categorizes them as Critical, Warning, or Optimal based on the metrics score in the Performance widget.

- The half donut chart displays the total number of production instances, total count, and the performance category, color-coded as Critical, Warning, and Optimal. The widget shows a maximum of three instances prioritizing those instances that are in Critical or Warning state over instances that are in Optimal state. The data is refreshed every 15 minutes.
- The top three instance names are listed below the dial component, displaying the type of instance, which is production instances by default, each of its performance status as Critical, Warning, or Optimal, the metrics affected that would be zero, and the Online and Offline Nodes that are similar to the cluster details.

In the Instances grid, the **Health** column displays Critical in red, Warning in yellow, and Optimal in green. Selecting the name of the instances opens a slider with the details of metrics that are affected. Selecting the links in the **Metrics Affected** column takes you to the performance page with the details of it in the last 24 hours.

For each instance, you can select the ⋮ icon and click the **Instance details** option to know more about the instance. Select the **View root cause** button for root cause analysis report.

Note: The **Instance details** and **View Root Cause** options are available only for instances that are in Critical and Warning states. However, the options aren't available for instances in Optimal state.

If the instance has insufficient data or if the report is still being generated, the status is either **Insufficient data** or **Work in Progress**, respectively.

- If a Critical or Warning performance root cause report link in the widget changes to Work in progress after a few minutes, it means that a new RCA report is being generated with the latest data. You can still access the previous report from the RCA History page.
- If a report is in Work in progress state, then the engine is still analyzing data. In the meantime, you can manually review the **Affected Metrics** or refer to the most recent report (generated in the last 1–2 hours) in the RCA History page for analysis.

Select the **View all Instances** link to view all the production instances in the Analytics page for that account.

Performance health summary customizable widget

You can also configure only one instance or multiple instances and view the performance summary.

To create a customizable widget on a new dashboard, see Create a dashboard.

1. Select the **Edit Dashboard** link on the top and click the **Add Widget** option.
2. Select **Custom** or **Out of the box** option for the kind of widget that you would like to add.
3. Select **Single** or **Multiple** option according to your requirement.
4. Select the instance names from the options available.
5. Select **Performance Insights** in the **Category** field.
6. Select **Add to Dashboard** button.

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The customizable widget comes with three tiles:

- Dial component: Add the Performance Insights widget provided by the base system to your custom dashboard.
- Single instance tile: Get details of any one particular instance that you want to view, and generate its root cause.
- Multi-instance tile: Select specific instances but more than one of your choices, and view each of its details and generate the root cause. This multi-instance tile has a different view configuration without the dial component.

You can also delete any of the components and customize it as you like.

Note: If you're a new user with a new instance that is newly added to the system, then there may not be any data. Data must be at least four-weeks old for the system to fetch from the back end.

Performance summary of Instances in Analytics page

If you select the **Analytics** menu and click the **Instances Summary** option, you have another option of viewing the performance status of your instances.

The instances performance summary in the **Analytics** tab is similar to the one in the user configurable dashboard. The dial component and the performance status counts are all similar, however there's a **Root Cause & Fixes** tile to generate the root cause details.

The widget is refreshed for every 15 minutes to get the latest data.

There's an additional **Alerts** column. Select the alert count of an instance in the column that opens the Alerts console of the instance, where you can view the alert count for the past three hours.

You can also access the instance details by selecting the ⋮ for that instance, which opens the Instance Details slider page where you can view the instance metrics that contribute to Warning or Critical performance. You can gauge the performance with the values of the metric in the last 60 minutes.

If the report is already generated, then you can view the report by selecting the **View root cause report** button in the Instance Details page for that instance.

The root cause report opens in a separate page with the **Root cause summary and resolutions** tab that lists the **Summary** and **Recommended resolutions**. The **Slow Transactions** tab gives the categories.

Select the instance name in the Instance column that opens a slider page displaying the instance name, instance type, and instance status. If the instance performance status is Optimal, then you wouldn't see any data fetched from the back end. The columns in the slider page are sortable and filterable, and selecting the links in the **Metrics Affected** column takes you to the respective performance page. The trend in data is displayed in the **Trend** column.

Performance

Monitor all your instances 24x7 in one place with near real-time metrics and alerts on performance and availability in Instance Observer. Generate various charts of overview Instance Health and Performance Metrics and drill down into specific data points with recommended troubleshooting.

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Make data-driven decisions based on your users, platform, and applications, access to near real-time and historical instance performance telemetry, and proactively visualize instance performance telemetry across instances with point-in-time metadata.

Key benefits

- View historical trends of performance data.
- Identify and investigate performance anomalies.
- View specific jobs and transactions running at a point in time.
- Access a deep dive into selected performance metrics

Performance metrics

The **Performance** tab lists many metrics for several key system components. These metrics help in collecting data about your instances, which aids in monitoring the performance of your instances. The metrics are:

- Transactions or Response Times
- Database
- Semaphores
- Event Queues
- ECC Queue
- Emails
- Schedulers
- Job Details
- Node Health
- Host Health
- Standby Replica Log
- Read Replica Log
- Chat Details
- Database Growth
- Cluster Details
- Load Balancer
- User Information
- Instance Data Replication

Access Instance Observer Performance page

1. To access the Instance Observer page, navigate to **Impact** > **Platform Health** > **Monitor** > **Instance Observer**
2. From the **Performance** menu, select the metric for the key system component.

Getting started with Performance charts

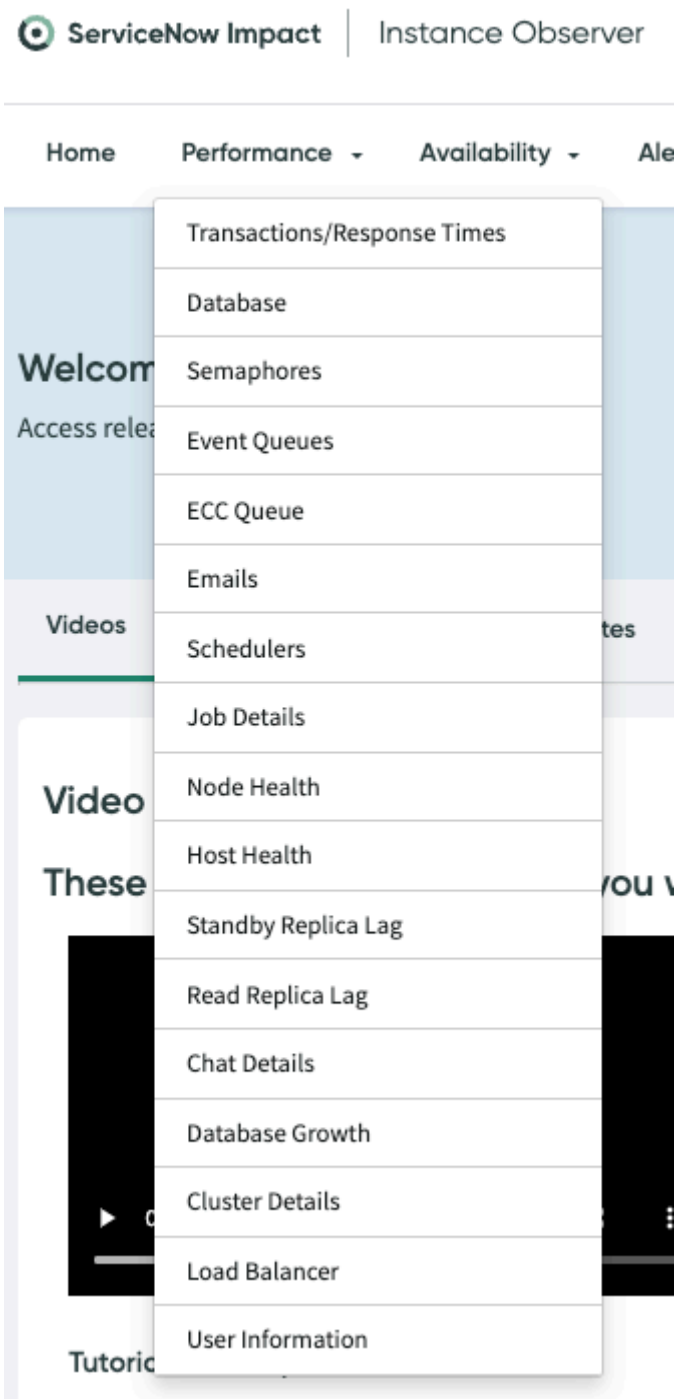
Follow these steps to generate Performance charts using Instance Observer.

Before you begin
Role required: admin

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Procedure

1. Navigate to **Impact** > **Platform Health** > **Monitor** > **Instance Observer**.
2. From the **Performance** menu, select the telemetry option to evaluate.



3. Select the reporting options:

- Instance
- Date range
- Metrics (The metrics available depend on the report selected.)
- Options and add-ons

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4. Select **Get Snapshot**.

Note: Options available on Report and Charts:

- Select a data point to view additional actions or remove the entry.
- Right-click to isolate a data point.
- Select and drag across the chart to drill down.
- Download to PNG, SVG, or CSV files or view transactions on the instance.
- Change the report type.

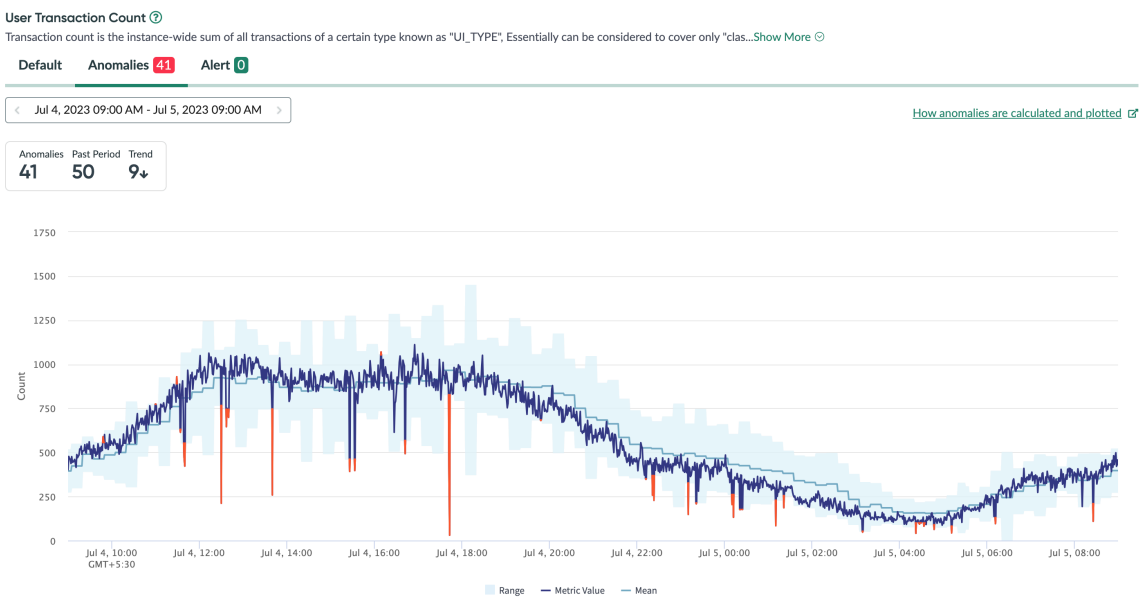
Anomalies detection

Instance Observer proactively detects the anomalies for cyclical or non-cyclical metrics under the performance chart for the Impact Total package on production instances. Anomalies represent metrics outliers based on historical patterns. Every anomaly may not represent an issue, but, notifies you and you decide the criticality and configure alerts, accordingly.

Cyclical metrics occur as a complete set of events that repeat themselves regularly in the same order or in a regularly repeated period. Non-cyclical metrics are metrics that repeat themselves irregularly or in random, less predictable repeated periods. An anomaly, also known as an outlier, is a data point that is unusual, rare, or doesn't conform to the expected patterns or distribution of the data.

There are five cyclical metrics being tracked:

- **Transaction count**: The instance-wide sum of all UI transactions of an internal type known as *UI_TYPE*.
- **Server Response Time**: The average or mean execution time for *UI_TYPE* transactions.
- **SQL Response Time**: The reported mean of database response time measured at the application layer that starts when a query is sent to the database and finishes when the response has been received.
- **Semaphore Mean**: The average number of end-user transactions being processed concurrently over a one-minute period.
- **Node Memory Max**: The in use memory max in MB per node at a given data point in history. This value generally ranges between 1000 MB to 2048 MB.



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- The x-axis represents time, and the y-axis represents the actual metrics as per date range selected. For example, the line chart displays the transaction count values over time. Anomalies are denoted by red color coding on the chart and represent the occurrence of an anomaly in the data. The placement of the red mark depends on the criteria or algorithm used to detect anomalies.
- The range represents the upper and lower boundary limits with a normal distribution of the metrics based on their historical dataset pattern.
- The mean line represents the four week average value of the metrics to compare the deviation at a given point in time.

Job anomaly detection

Job anomaly charts track the number of scheduled jobs running concurrently for each hour of the day with the overlaying metric of the average of transaction counts for each hour. Any bar in the chart that has one or multiple anomalous jobs is highlighted as red. Select the detail link of the bar chart to view the job level details.

Job Details will represent the hourly scheduled jobs along with respective average transactions of that instance.



Drill down from the hourly scheduled job count into an individual recurrence job for any hour of day and further into the execution pattern of the same job from the last seven days. This can help to perform end to end root cause for jobs that usually take a consistent amount of time to complete that suddenly experience a significant increase or decrease in execution time, indicating a possible performance issue.



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Schedule job criteria

For the job to be considered a scheduled job, it should satisfy at least one of the following criteria:

- The job runs at least once for each day of the week.
- The job has run at least once for every week in the past four weeks.

Average transaction count calculation

For every hour in a given day, the sum of the transaction count of the past four weeks for the same day and same hour is averaged. For example, by fetching the sum of transaction counts from the past four Mondays for the fourth hour and averages the values for the final calculation.

Job anomaly identification

For the past four weeks, for every hour in which the job ran, the average duration time is calculated with the standard deviation value, which is the mean value, plus 5 multiplied by the standard deviation value.

This value serves as an upper range for the job for that hour, if the job is running at the fourth hour and in the last four weeks the average duration of a job at that time is ten minutes and the standard deviation is two minutes, the upper range will be 10 + (5*2) = 20 minutes.

If the current running job takes more than 20 minutes to execute, then the job is identified as an anomaly.

Anomaly response

All anomalies don't represent an issue, but, the outliers detected based on historical patterns. Configure alerts accordingly after analyzing the criticality of the anomaly detected. See Configure anomaly alerts for more information on alerts.

Configure anomaly alerts

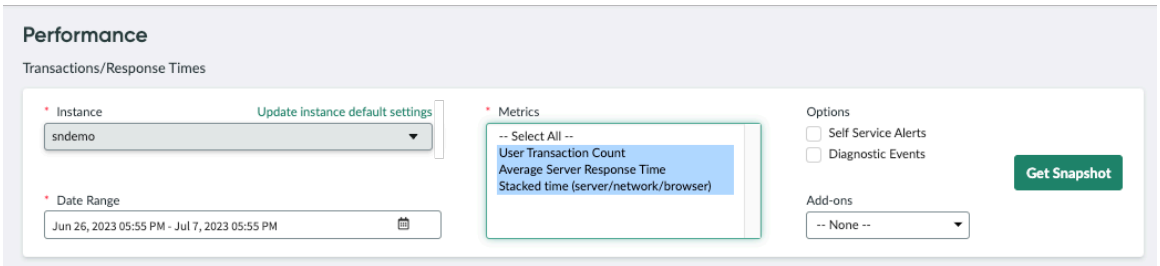
Configure anomaly alerts based on metrics outliers on historical patterns in Instance Observer.

Before you begin

Role required: admin

Procedure

1. Navigate to **Impact** > **Platform Health** > **Monitor** > **Instance Observer**.
2. From the **Performance** menu, select **Transactions/Response Times**.



3. Select the reporting options:
   - Instance
   - Date range
   - Metrics

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- Options:
  - Self Service Alerts
  - Diagnostic Events
- Add-ons

4. Select **Get Snapshot**.

Note: Options available on Report and Charts:

- Select a data point to view additional actions or remove the entry.
- Right-click to isolate a data point.
- Select and drag across the chart to drill down.
- Download to PNG, SVG, or CSV files or view transactions on the instance.
- Change the report type.



5. Fine tune the alerts using the listed options.

- For example, set a threshold that triggers an alert if the transaction count anomalies persist for more than 10 minutes, or exceeds a certain number of standard deviations from the mean continuously for more than 10 minutes above or below the range, respectively. Job anomalies target top X % of anomalous jobs based on the execution time and track the details of those jobs.
- Test and fine tune the alerting by simulating persistence time, choose the window of an anomaly 5, 10, 15 minutes, and so on, or select the top 5,10, or 15 percentage of jobs and verify that alerts are triggered correctly. Adjust the alert threshold, if necessary, to ensure the system provides meaningful and actionable alerts.

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- Choose the appropriate method for sending alerts based on your requirements. This can include email notifications, SMS messages or integration.
- Continuously monitor the alerts generated by the system. Regularly review the anomalies detected to understand the underlying causes and take appropriate actions, such as investigating potential issues or performing further analysis.

Anomaly detection algorithm

Instance Observer is performing anomalies detection through the Z-score Statistical model, otherwise referred to as a univariate method.

Anomaly detection analyzes a set of five metrics, Memory Max, Semaphore Mean, SQL response time, Server Response Time and Transaction count. The detection model has been validated with samplings with multiple instances of daily, weekly, and monthly level data.

Metrics representing anomalies using the Z-score model are Transaction count, Server Response Time & SQL Response time. Metrics representing anomalies using an upper threshold-based approach are Semaphore Mean, Node max Memory, and Job execution. Refer to Getting started with Performance charts for details on the five metrics.

Upper threshold-based methodology

Upper threshold-based methodology uses metrics with an exhausting limit. For example, metric A, which has a semaphore mean value of 14 or 16, which is used on the platform to limit the number of transactions that can occur on a node at one time to protect resources on the node. Metric B, memory max of 2 GB, where each node memory has a pre-defined maximum capacity. In all such similar cases, the situation is alarming only when the metrics are closer to the exhaustion limit. Even if the deviation is higher than the mean, but lower than the exhausting limit, then the threshold limit wouldn't result in an alarm.

Z-score methodology

A Z-score is a numerical measurement that describes the relationship between a value to the mean of a group of values. Z-score is measured in terms of standard deviations from the mean. If a Z-score is 0, then the data point score is identical to the mean score.

The formula for calculating a Z-score is $z = (x-\mu)/\sigma$:

- x : The raw score of the data, as the moving average of the previous 15 minutes
- μ: The data population mean that is the average of the previous four weeks on the same day, same hour, and same minute
- σ: The data population standard deviation

When calculating Z-scores or making comparisons, it's essential to consider these patterns of the analyzed data with inherent cyclical patterns. Cyclicity in a dataset refers to repeating patterns that occur at regular intervals, such as daily, weekly, or seasonal cycles. For example, sales data may exhibit higher values during holiday seasons or lower values during off-peak periods.

The cyclicity score is the similarity between two series which measure the similarity between two vectors and helps ensure that the Z-score model provides reliable insights and identifies true anomalies or outliers while considering the natural patterns of the data.

The cyclical score is calculated at the instance level with a data selection of four weeks divided into two-week vector increments, excluding weekends. The score returns the similarity score

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between the two, where a higher score indicates a more aligned similarity trend in the compared vector data.

Analyze job details for long pending jobs

Stay ahead of job delays by identifying and acting on jobs that breach predefined lateness thresholds. The Long Pending Jobs alert card tracks pending jobs by lateness duration, so you can act on the pending jobs before they affect the downstream workflows and miss the SLAs.

Before you begin

Role required: admin

The job details capability is available to all users regardless of their tier level.

About this task

Instance Observer's job monitoring capability has expanded with a new telemetry to help you analyze job behavior more deeply. Existing IO job performance capability already supports in-depth analysis into job execution, anomalies, and top resource-intensive jobs — top 2000 by execution time.

The new telemetry addresses pending jobs that have been scheduled but are stuck in a ready or queuing state, and have not transitioned into an executing phase.

Jobs get stuck because of:

- Insufficient resources to pick up new jobs
- Something is blocking execution
- New jobs are unable to start

What you need:

- Visibility into how long the pending jobs have been overdue.
- An alert so you can act on them — either reschedule or terminate the stuck jobs to keep the instance healthy.

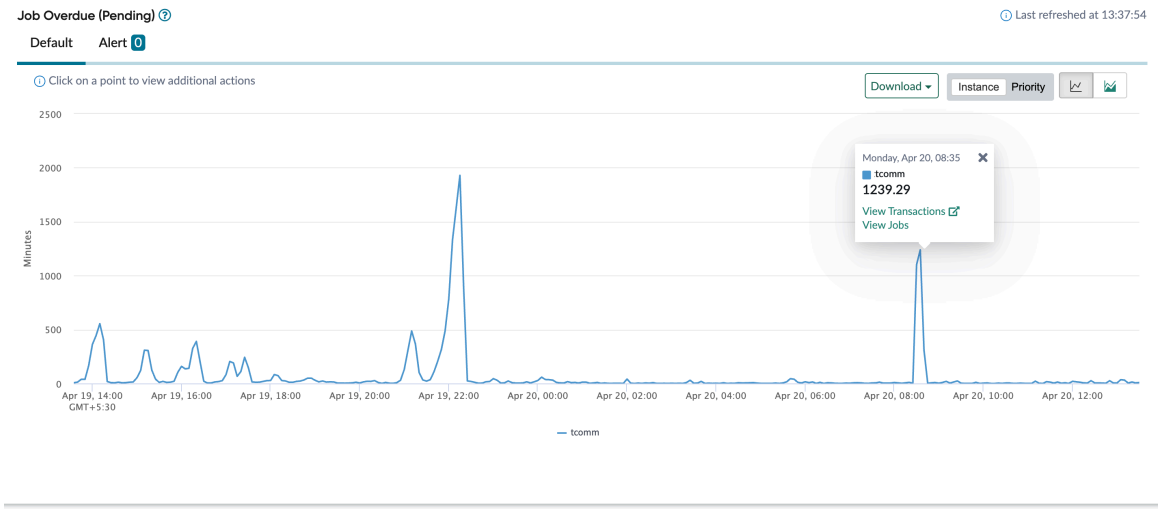
The long pending jobs alert provides minute-level telemetry on the pending jobs, showing at the instance level how many jobs are pending and by how many minutes they are overdue on average.

Beyond pending jobs, this telemetry not only helps you to know how long a job takes to run, but also which jobs aren't running at all, and how long they're being delayed.

Procedure

1. Navigate to **Impact** > **Platform Health** > **Monitor** > **Instance Observer**.
2. In the **Performance** menu, select the **Job Details** option.
3. Select the instance from the **Instance** field.
4. Select the metrics **Job Overdue (Pending)** and **Top 2K Pending Jobs** options in the **Metrics** field to get specific reports on the overdue pending jobs and those at the top 2000 level.
5. Select the **Date Range**, and **Get Snapshot**.

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Top 2K Executing Jobs

*The job list below does not reflect all jobs executed on the instance, the list only reflects jobs we saw executing on nodes when the data was collected.

Download as CSV

Job Name	Executed on Node	Worker	Current Start Time	Current Duration (Approx.)
Collab Chat - Notify Unread Messages	tcomm209	glide.scheduler.worker.5	2026-04-17 13:30:01 GMT+5:30	2 days 22 hrs
ConfigurationItemUpdater ProcessRules	tcomm248	glide.scheduler.worker.4	2026-04-17 16:30:02 GMT+5:30	2 days 19 hrs
Checkpoint Reaper	tcomm021	glide.scheduler.worker.0	2026-04-18 3:00:00 GMT+5:30	2 days 9 hrs

6. Select a point in the chart of the **Job Overdue (Pending)** section to get a continuous, minute-level view of how long pending jobs have been overdue across your instance.
   At any point in time, you can identify the jobs that are delayed or overdue from the scheduled time. This analysis helps you spot outliers before they impact your workflows.
7. Scroll down to the **Top 2K Pending Jobs** table to view the listing of specific jobs that are most overdue from their scheduled time, along with their priority, job ID, and approximate overdue duration.
8. To set filter conditions on the job name, job ID, or priority, select 
   For example, you can enter **discovery** to filter all jobs that have **discovery** in their name.

Top 2K Pending Jobs

*The list of Jobs displayed below are jobs that are to be executed based on their average delay to start the scheduled job.

Download as CSV

Job Name	Job ID	Priority	Collection Time	Overdue (Approx.)
1cbda85d2bd40f941850f5805291bfc3_16-Apr-26 2...	UserRoleHistorySyncCoordinatorJob	Contains / Filter... / Clear	2026-04-17 2:26:00 GMT+5:30	1 secs 200 ms
1cbda85d2bd40f941850f5805291bfc3_16-Apr-26 1...	UserRoleHistorySyncCoordinatorJob		2026-04-17 0:26:00 GMT+5:30	1 secs 200 ms
1cbda85d2bd40f941850f5805291bfc3_16-Apr-26 1...	UserRoleHistorySyncCoordinatorJob		2026-04-17 0:12:00 GMT+5:30	1 secs 200 ms
1cbda85d2bd40f941850f5805291bfc3_16-Apr-26 1...	UserRoleHistorySyncCoordinatorJob	100	2026-04-16 22:50:00 GMT+5:30	
1cbda85d2bd40f941850f5805291bfc3_16-Apr-26 1...	UserRoleHistorySyncCoordinatorJob	100	2026-04-16 20:44:00 GMT+5:30	
1cbda85d2bd40f941850f5805291bfc3_16-Apr-26 1...	UserRoleHistorySyncCoordinatorJob	100	2026-04-16 18:24:00 GMT+5:30	
1cbda85d2bd40f941850f5805291bfc3_16-Apr-26 1...	UserRoleHistorySyncCoordinatorJob	100	2026-04-16 21:32:00 GMT+5:30	

1 to 100 of 189 Page 1 of 2

9. To sort the jobs by their priority level, select 
   For instances running thousands of jobs, analyzing job by job isn't practical. You can switch to **Priority** view, grouping jobs by their assigned priority level. This sorting helps you to categorize and act on jobs in bulk. For example, address all mid-server discovery jobs (priority 110) or test jobs (priority 100) in bulk, rather than managing them individually.
10. To download the data, select **Download as CSV**.

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What to do next

You can also set alert card for pending jobs. For more information, see Configure long pending jobs alert by job priority.

Availability

The Availability section shows instance level availability on a geographic map and instance level ServiceNow generated alerts (limited alert types) since the past 7 days.

Instance Availability

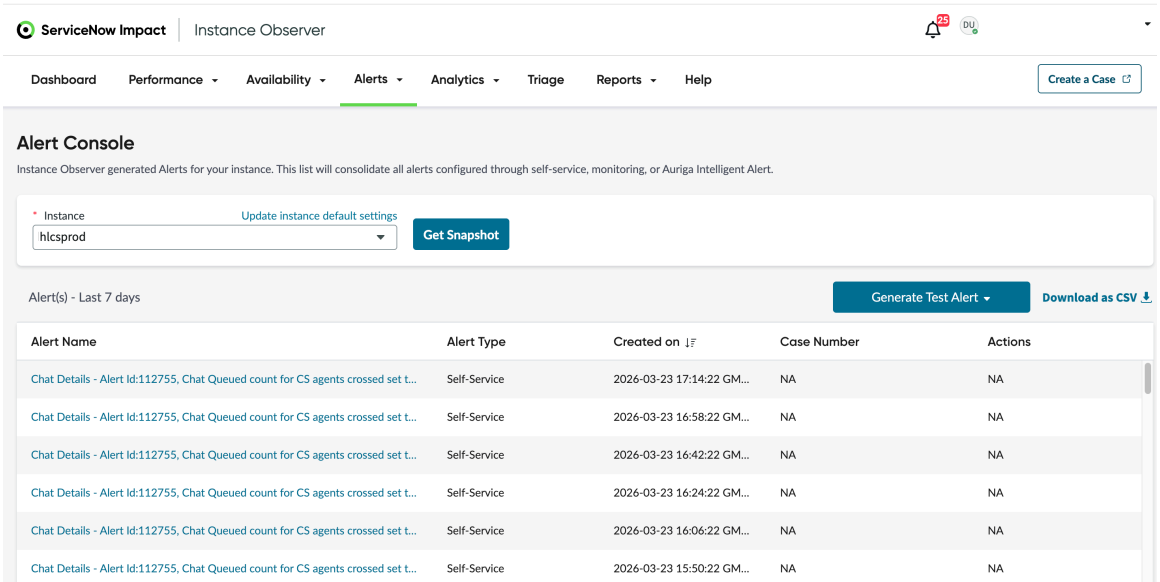
1. Navigate to **Impact** > **Platform Health** > **Monitor** > **Go to Instance Observer**.
2. Select **Availability** tab and click **Instance Availability** value.
3. Select an instance in the **Instance** field and click **Get Snapshot** to view the instance availability in a geographical map.

   The map plots and highlights the primary and standby data centers by Geo location together with the ServiceNow footprint (all other data center locations). The color of the plot determines the current availability:

   - green = available
   - red = unavailable

   based on an active Instance Up/Down alert.

   Note: All alerts generated for your instance are consolidated and listed in the Alert Console. To monitor the alerts, navigate to **Alerts** > **Alert Console** and filter the **Alert Type** column with the value **Monitoring** to see the instance's Up/Down time.



4. Select **Detailed Instance Availability** to navigate to the Instances Dashboard

Known Issues

A problem or defect of an instance that requires proactive mitigation is listed in the **Known Issues** tab of the **Availability** section.

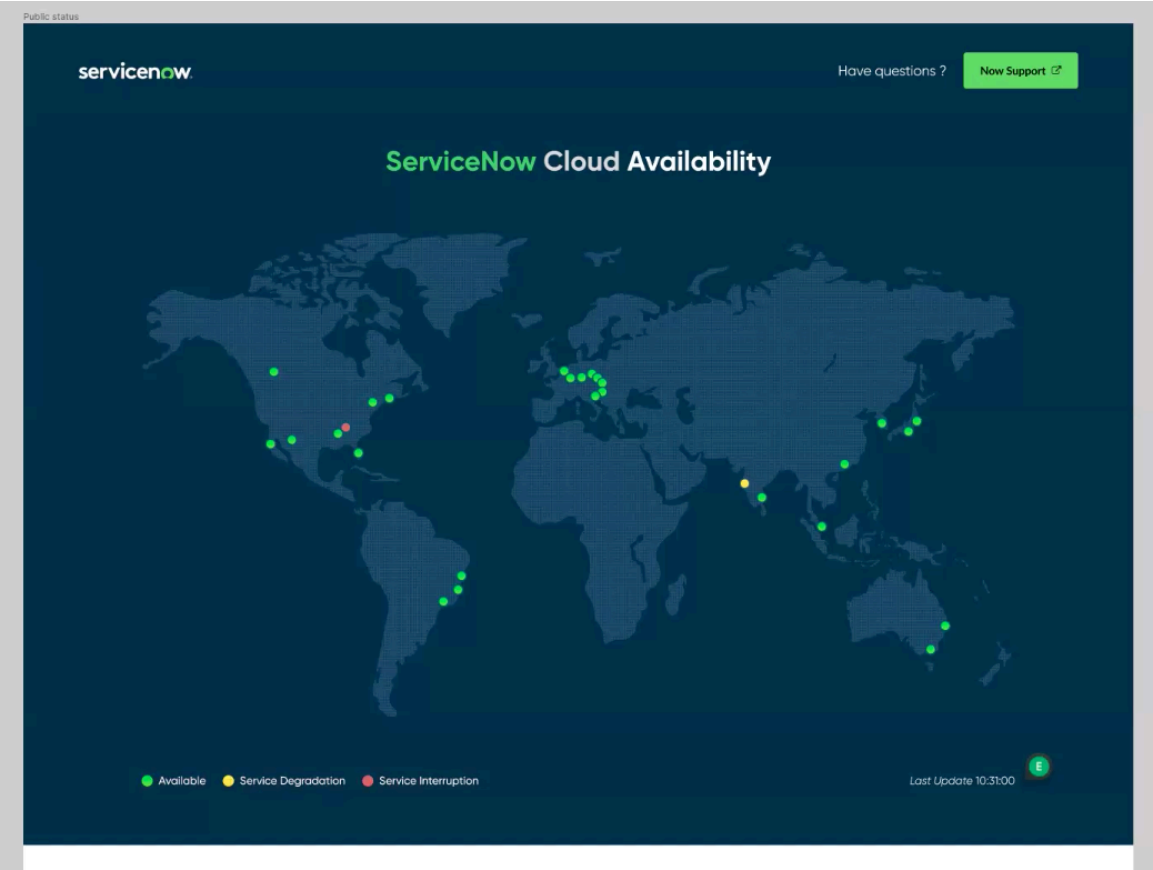
Cloud availability

Check specific ServiceNow data center availability, service degradation, or for interruption.

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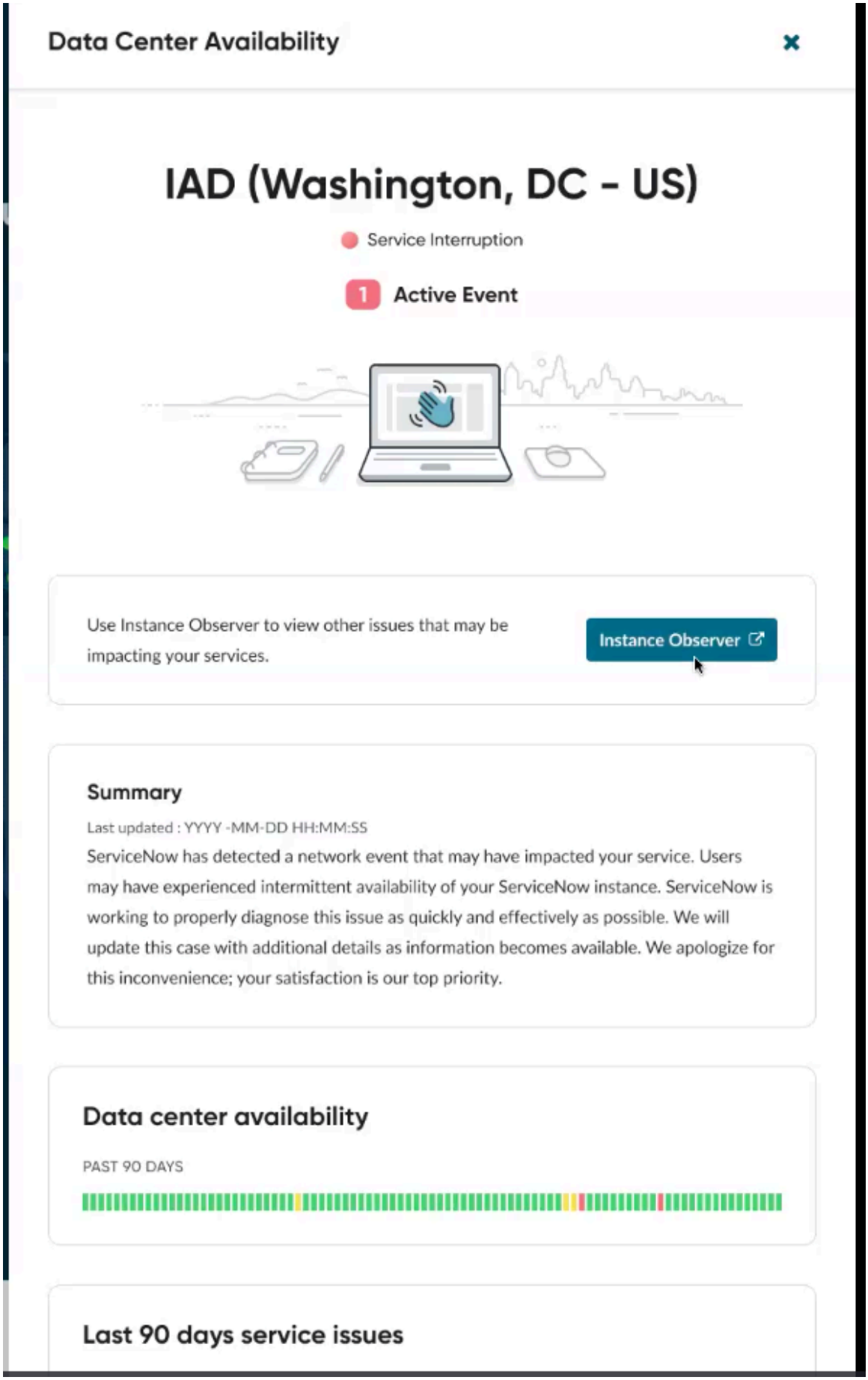
The cloud availability is displayed in a world map view with colored status indicators representing the availability of each data center.

- Available: Green
- Service degradation: Yellow
- Service outage: Red



See which data center is available and if there is an outage or a specific trend of activity. Select a specific data center from the map to expand the details.

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Go directly to Instance Observer, view summaries of the availability, and details of the last 90 days service issues.

Alerts in Instance Observer

ServiceNow Instance Observer provides a comprehensive set of alerts designed to monitor platform health, performance, and user experience. These alerts are categorized for easy consumption and actionability.

Transactions

Monitors application transactions for anomalies, spikes, or degradations in performance such as:

- Transaction Decrease: Detects a drop in total transaction volume
- Transaction Decrease Node: Identifies transaction volume drop per node
- Transaction Increase: Flags unexpected transaction surges
- Transaction Increase Node: Highlights node-level transaction spikes
- Response Time: Triggers when system-wide response time increases
- Response Time Node: Flags nodes with degraded response times
- Database Response Time: Monitors database-level latency impacting transactions
- Slow Queries Per Second: Identifies the volume of slow database queries affecting responsiveness

Node health (CPU, memory, or garbage collection)

Tracks node infrastructure health to avoid bottlenecks or failures:

- Node CPU time: High CPU usage alert for a node
- Node memory: Monitors memory consumption patterns
- Node garbage collection time: Tracks JVM GC delays
- Load balancer container CPU utilization: Flags CPU overload on LB containers
- Load balancer container memory utilization: Detects memory exhaustion on LB containers

Database performance and health

Covers critical database indicators to verify query health and data reliability:

- Database host health CPU: High CPU on primary DB host
- Shards host health CPU: Resource issues on shard hosts
- Read replica host health (CPU): Read-replica CPU anomalies
- Standby replication lag: Lag in standby DB replication
- InnoDB row lock: Frequency of row lock waits
- Primary database growth: Flags abnormal growth in primary DB
- Database table growth: Specific table-level growth indicators

Inbound and outbound email

Promotes timely delivery and ingestion of email-based communications:

- Outbound email: Delays or failures in outbound email processing
- Inbound email: Issues in ingesting incoming emails

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Scheduler and job execution

Helps detect issues in the job execution life cycle:

- Scheduler stuck: Scheduler not progressing or blocked
- Long-running jobs: Jobs exceeding typical run time
- Specific long-running jobs: Custom job monitoring
- Thread running: Threads running unusually long or in high volume

Session and user activity

Tracks user login behavior across instance and nodes:

- User session logged in – Instance: Log in activity across instance
- User session logged in – Node: Node-wise session metrics

Event queue and semaphore management

Critical for debugging platform event handling and job execution throttling:

- Default semaphore mean: Semaphore wait time trends
- Default semaphore QDepth: Depth of queued semaphore requests
- Integrated semaphore: Monitors integrated semaphore contention
- Event queue check: Tracks backlog in event queues
- Specific queue for events: Custom event queue monitoring
- High priority event queue: Monitors mission-critical event queues
- ECC queue: External communication channel backlog alerts

Asynchronous Messaging Bus (AMB)

Internal messaging bus observability for real-time app behavior:

- AMB send queue depth: Size of outgoing message queue
- AMB send in use: Utilization of AMB sending capacity

Historical or list data volume

Monitors growth of historical or list data that can impact performance:

History list length: Flags excessive record count in history tables.

Application host health

Monitors health at the application layer:

Application host health CPU: Application-tier CPU overload alerts.

AI/ML or intelligent alerting

Includes alerts generated via AI/ML-based behavior analysis:

Auriga Intelligent: AI-driven anomaly or pattern detection alerts.

Key alerts – activation and notifications

Use the Instance Observer Key Alerts Activation functionality for flexibility to set alerts with historical thresholds from four week increments specific to your business needs and configure who on your team receives notifications.

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Note: Instance Observer **Alerts** support is only available for Advanced and Total packages of ServiceNow Impact.

Keys alerts activation will provide you with proactive alerts about moving averages, a statistic that captures the average change in a data series over time, for six critical metrics:

1. **Transaction (increase) Instance**: Indicates transaction moving average increases by a certain percentage of it's historical median for a certain time period.
2. **Transaction (drop) Instance**: Indicates transaction moving average drops by a certain percentage of it's historical median for a certain time period.
3. **Response Time – Instance**: Indicates the moving average of response time is greater than the historical median in a certain time period.
4. **Database Response Time**: Indicates the moving average of database response time is greater than the historical median in a certain time period.
5. **Default Semaphore Mean**: Indicates the default semaphore mean is approaching limits of max concurrency by a certain factor in a certain time period.
6. **Default Semaphore Queue Depth**: Indicates the default semaphore queue depth is approaching limits of maximum queue depth by a certain factor in a certain time period.

Note: It is important to note that each notification may not represent an issue, moreover signals about a data point that is unusual or does not conform to the expected patterns for that specific metric. Users can be proactive, where necessary, and act on a notification accordingly that may avoid a future issue.

Instance Observer utilizes the P-Score to assess instance usage, then calculate the thresholds exclusively for those instances. The P-score is a rating determined by the number of transactions on an instance, providing a higher score when the instance's transactions remain consistently stable.

- When an instance meets the required P-Score for eligibility, users will see a banner to opt-in for the alerts activation feature. Users will receive intelligent thresholds under the **IO recommended** condition for all six metrics derived from historical data.
- If an instance has a low P-Score, the banner to opt-in for alerts activation feature will not be visible. The P-Score is regularly refreshed, and as instances grow in the future, you will see the option to opt-in for the alerts activation feature. Thresholds are refreshed automatically weekly for instances meeting the minimum P-Score criteria.

To set up alerts, see Configure Key Alerts.

Configure Key Alerts

Follow these steps to configure Key Alerts on an instance where critical alerts have not yet been configured.

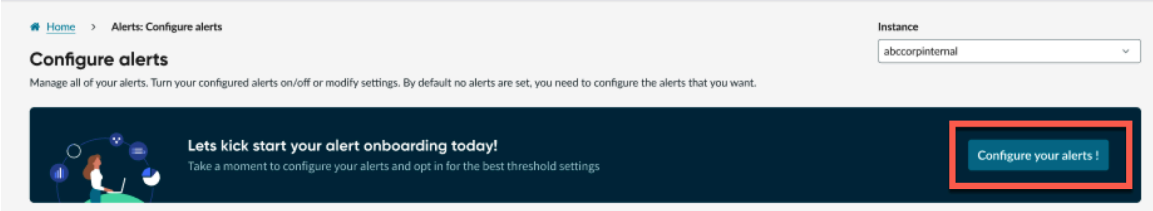
Before you begin

Role required: admin

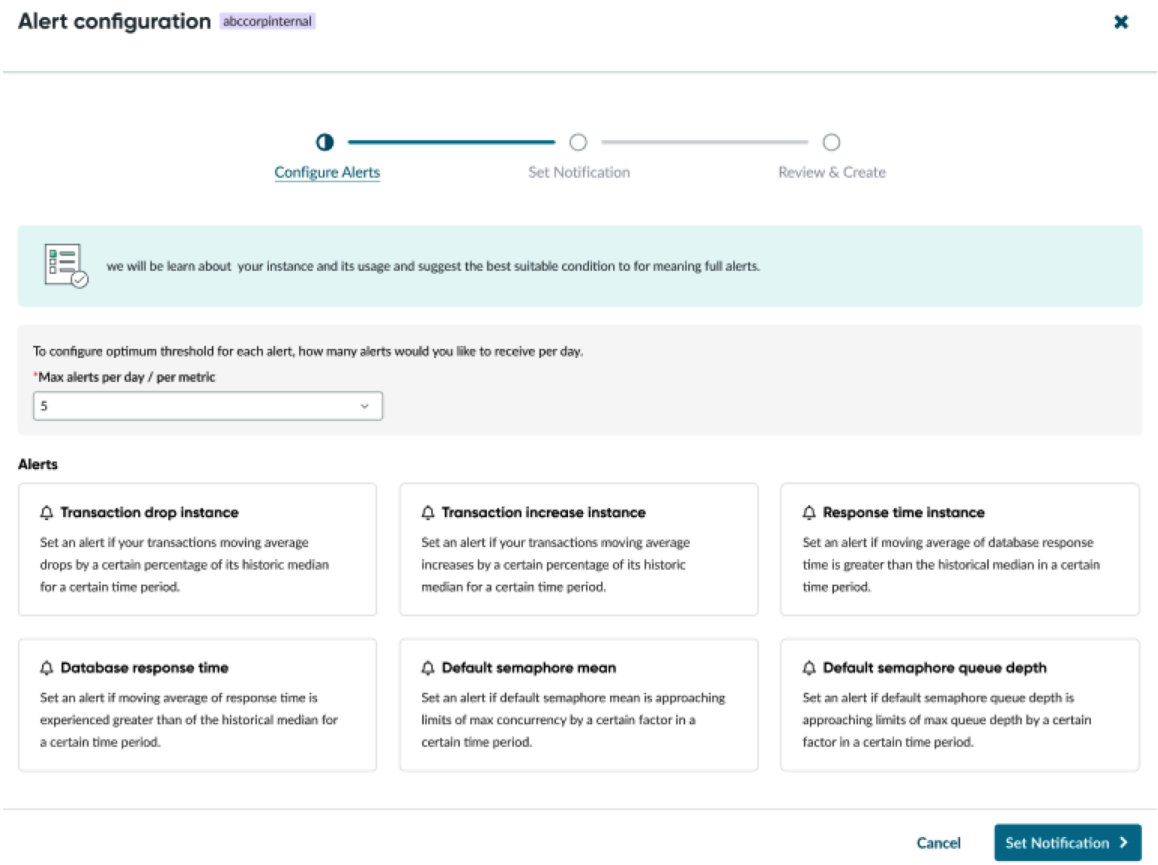
Procedure

1. Navigate to **Impact** > **Platform Health** > **Monitor** > **Go to Instance Observer**
2. Log in to Instance Observer and navigate to **Alerts** > **Configure alerts**.

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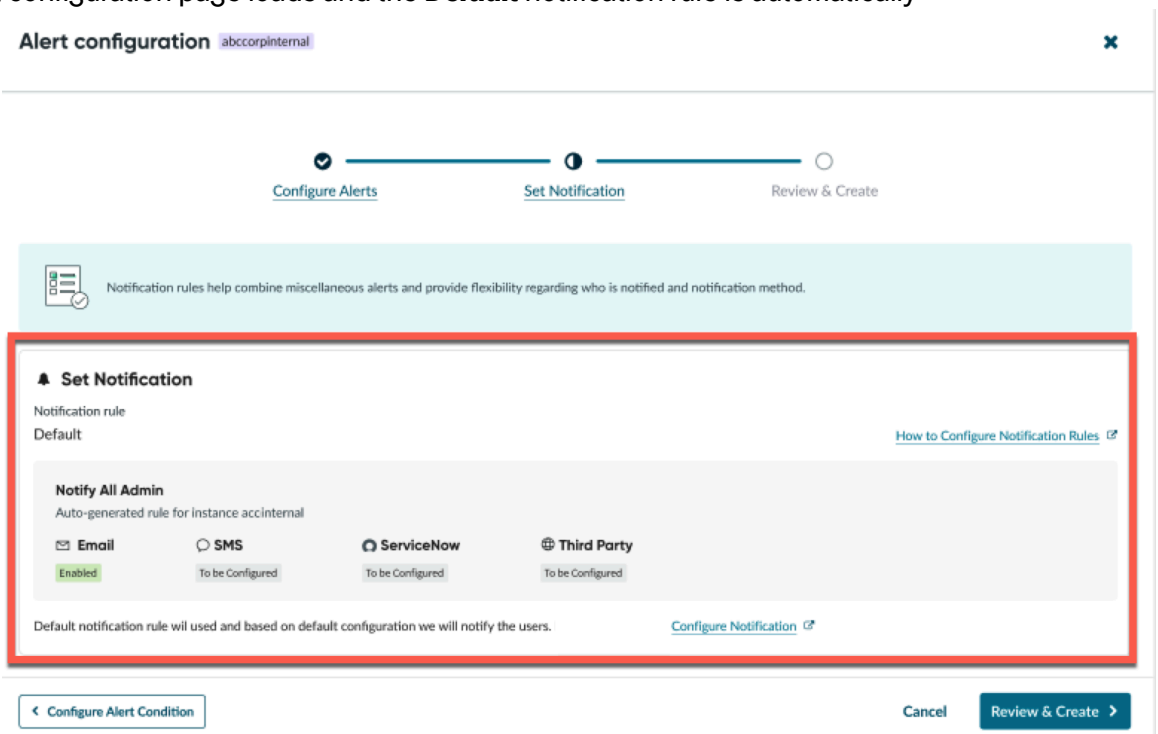
3. Select **Configure your alerts**.
   Alerts for metrics chosen by the system display.
4. Select up to five alerts from the **Max alerts per day / per metric** drop-down to receive for each metric per day.
   The maximum number of alerts selected pertains to each of the six available system metrics. If you choose a maximum of two alerts for each metric, then you receive 12 alerts, as the maximum alert count each day, for example (2 alerts) X (6 metrics) = 12 alerts. The alert count resets daily at 00:00



   UTC.
5. Select **Set Notification**.

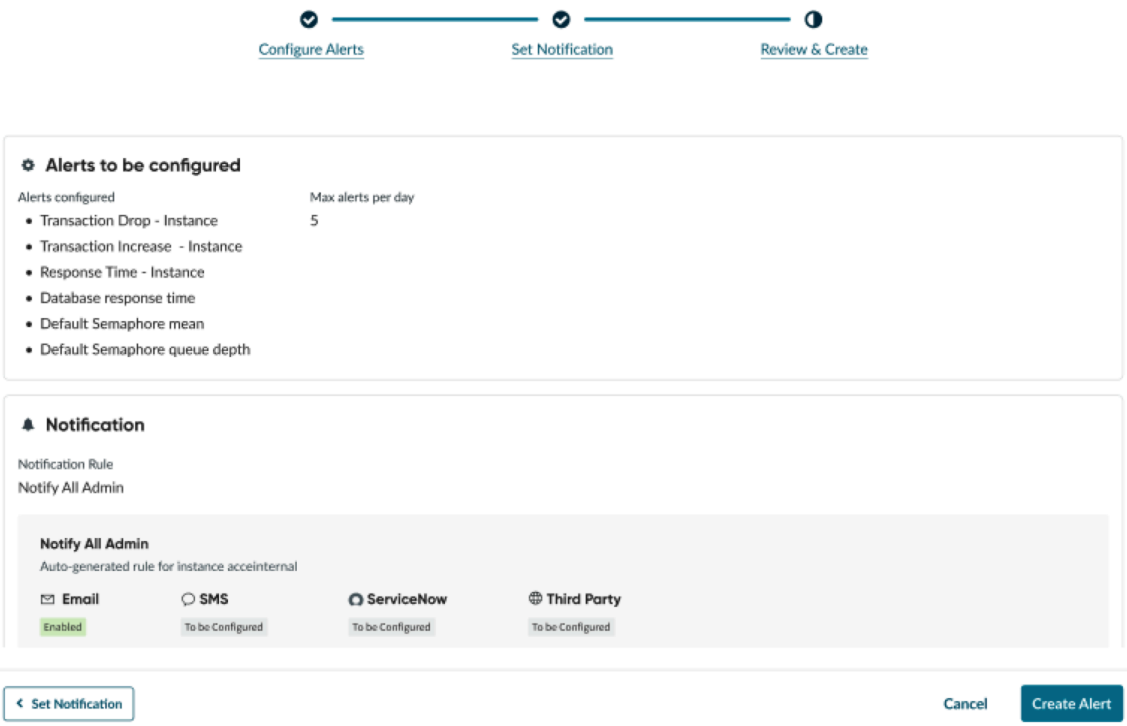
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The Alert configuration page loads and the **Default** notification rule is automatically



selected.

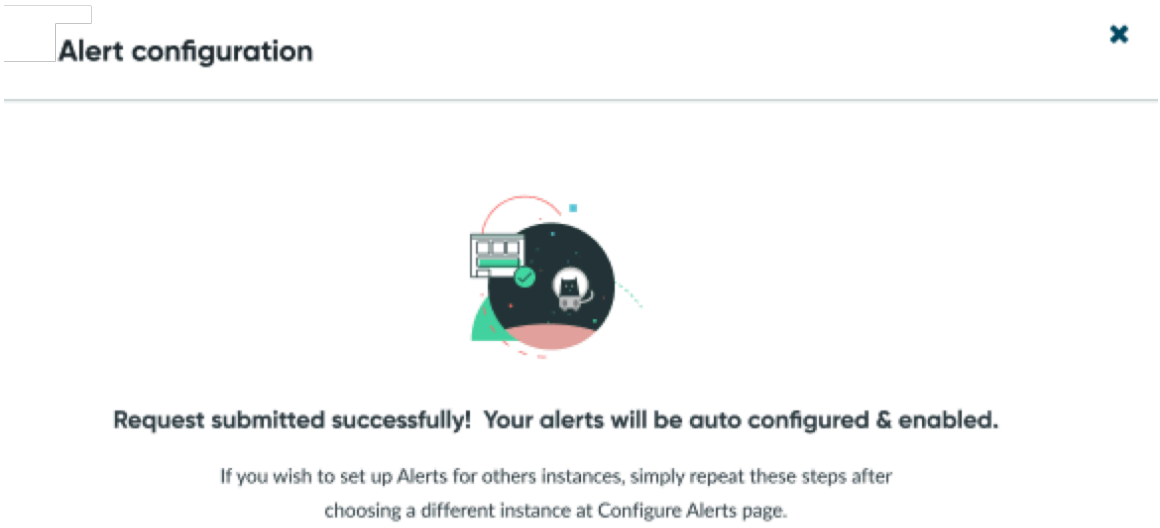
6. **Optional:** Select **Configure Notification** to create a custom rule.
   The **How to Configure Notification Rules** link contains information on custom notification creation. Rule options include Rule Name, Recipients, and Notification Methods.
7. Select **Review & Create** to display the summary of the alerts to be configured and the notification rule.



8. Select **Create Alert** or **Set Notification** to return to the notifications configuration page.

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A notification appears to confirm the alert configuration.



Result

After the request submission, all six alerts will be enabled automatically, no manual intervention is required. If you want to see the alert threshold, navigate to **Edit Alert configuration** to access the **IO recommended** condition.

Note: If one or more alerts out of the six available aren't enabled automatically, then a threshold wasn't available for that specific metric due to limited use in the instance.

What to do next

Manage Instance Observer alerts

Generate thresholds for key alerts

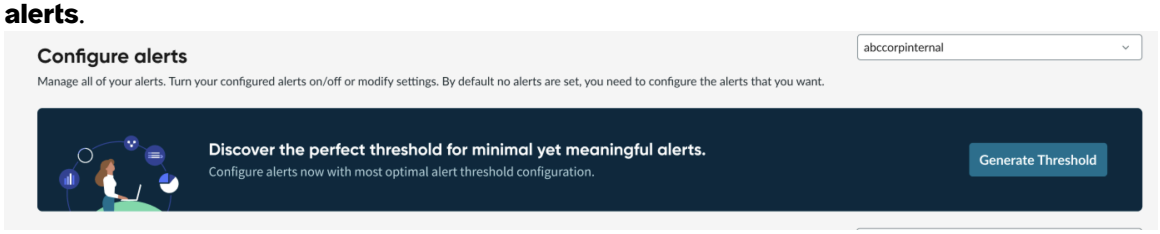
For an instance where critical alerts have already been configured you can obtain improved thresholds to receive enhanced or minimal alerts.

Before you begin

Role required: admin

Procedure

1. Navigate to **Impact** > **Platform Health** > **Monitor** > **Instance Observer** > **Alerts** > **Configure alerts**.

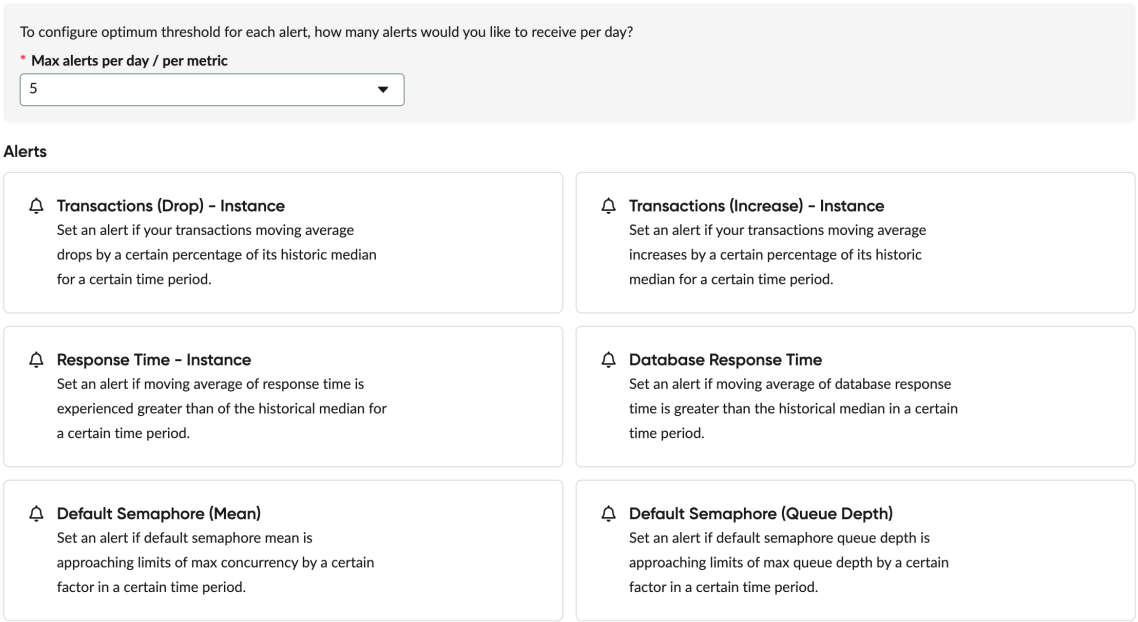


   A notification banner displays. If the banner prompts to configure alerts, see Configure Key Alerts.

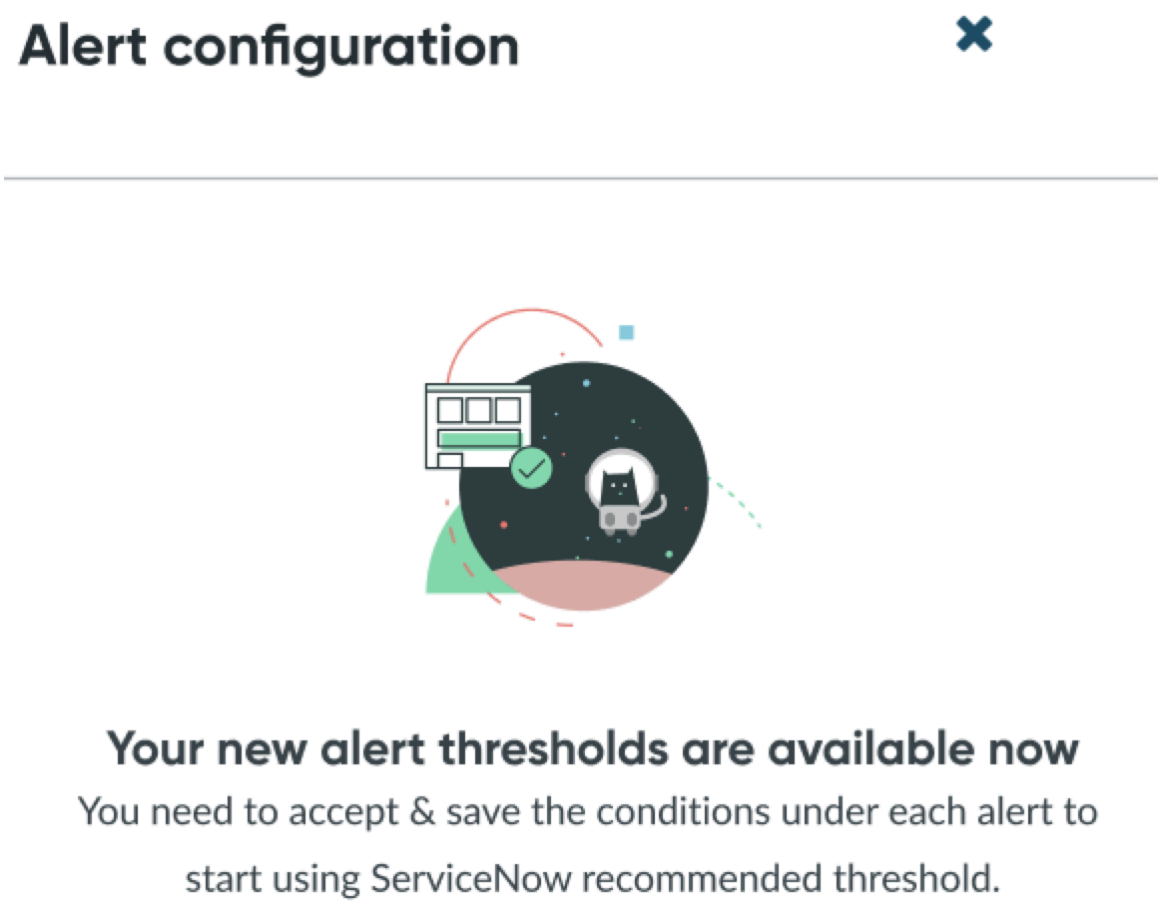
2. Select **Generate Threshold**.
3. Select up to five alerts from the **Max alerts per day / per metric** drop-down to receive for each metric per day.

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The maximum number of alerts selected pertains to each of the six available system metrics. If you choose a maximum of two alerts for each metric, then you receive 12 alerts, as the maximum alert count each day, for example (2 alerts) X (6 metrics) = 12 alerts. The alert count resets daily at 00:00 UTC.

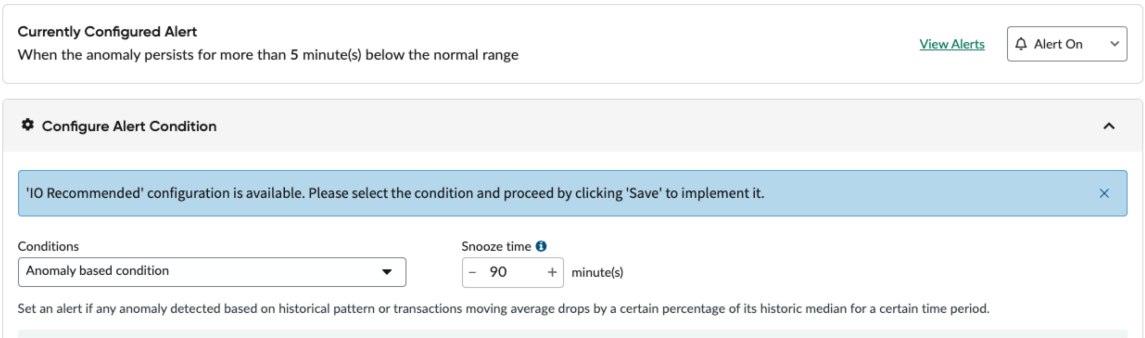


4. Select **Submit**.
   A confirmation message displays.



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5. Navigate to **Edit Alert Configuration**.
   An informational blue banner displays with a recommended alert configuration.

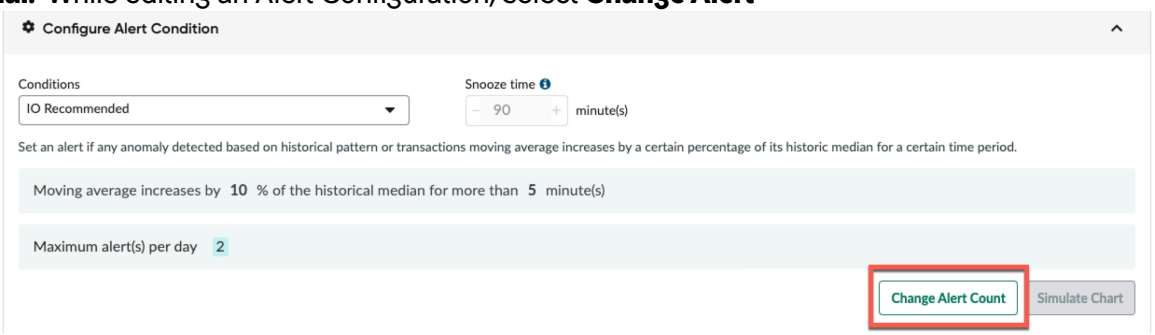


6. Select the **Configure Alert Condition** banner.
7. Select **Save**.
8. Repeat these steps for the remaining alerts.

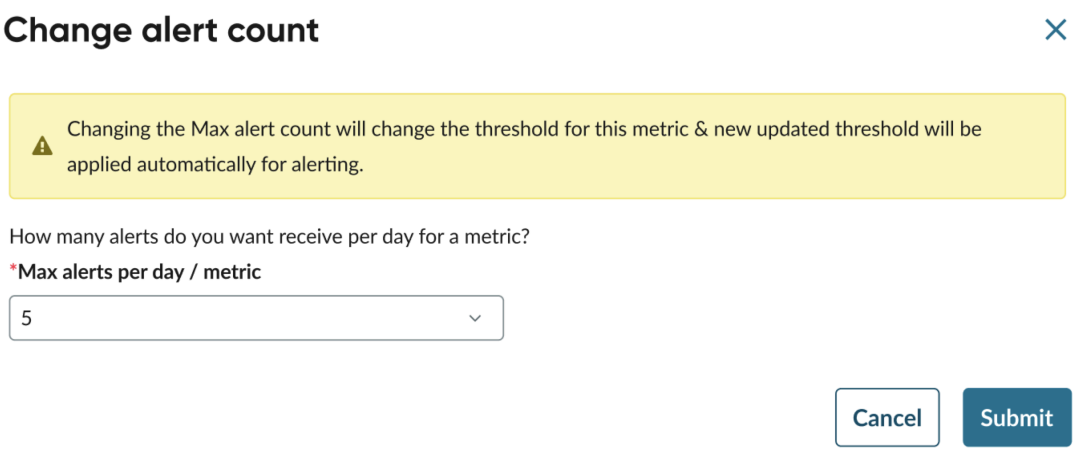
> **Note:** If an alert condition banner isn't available for any of the six alert conditions, then threshold data aren't available for that specific metric at this time. Thresholds are regularly refreshed, and the recommendations become available.

After alerts are enabled with the recommended thresholds, the details can be updated manually.

9. **Optional:** Select **Configure Alert Condition** for a selected metric.
10. **Optional:** While editing an Alert Configuration, select **Change Alert Count**.



11. **Optional:** Select a maximum alert value of up to five and select **Submit**.



After the change is submitted, the pre-calculated threshold is fetched based on the new maximum alert count for the specific metric. You're returned to the Edit Alert Configuration window.

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12. Select **Save** on the Edit Alert Configuration window to apply the changes.
13. Repeat the same process for each alert to edit additional metrics alert configurations.

> **Note:** If you choose three max alerts per day, then you may receive up to three Alerts notification per day for that specific metric. The alert count resets daily at 00:00 UTC.

Manage Instance Observer alerts

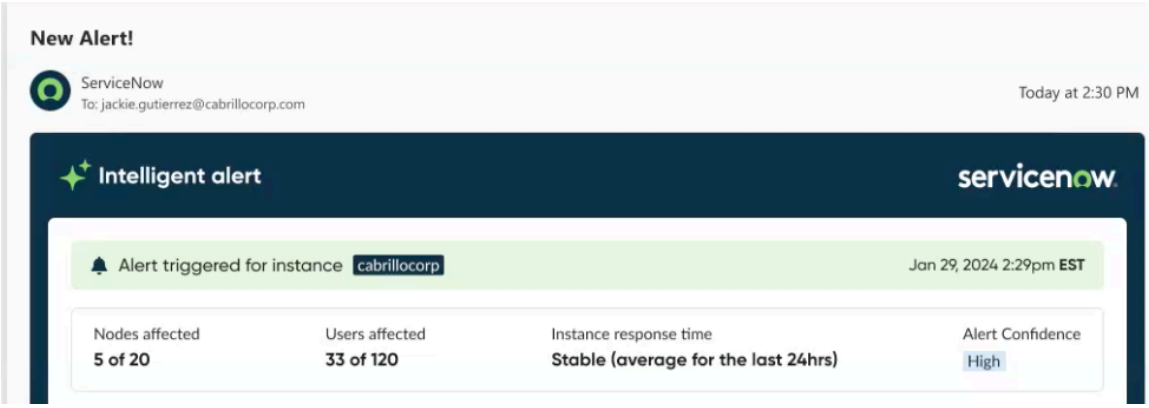
Act on Instance Observer (IO) threshold alerts directly from the notification.

Before you begin

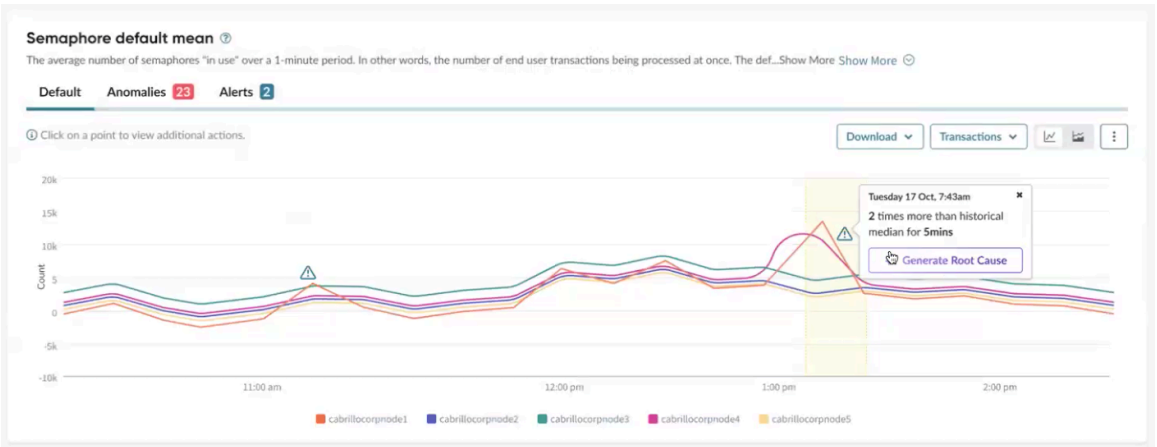
Role required: admin

Procedure

1. Open an alert threshold notification.
   The email notifications originate from ServiceNow and the subject is `New Alert`.



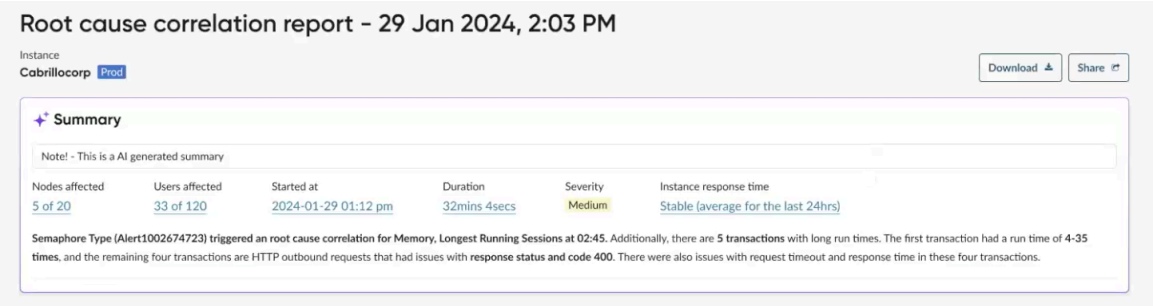
2. Select the alert banner to be directed to the threshold chart in Instance Observer.



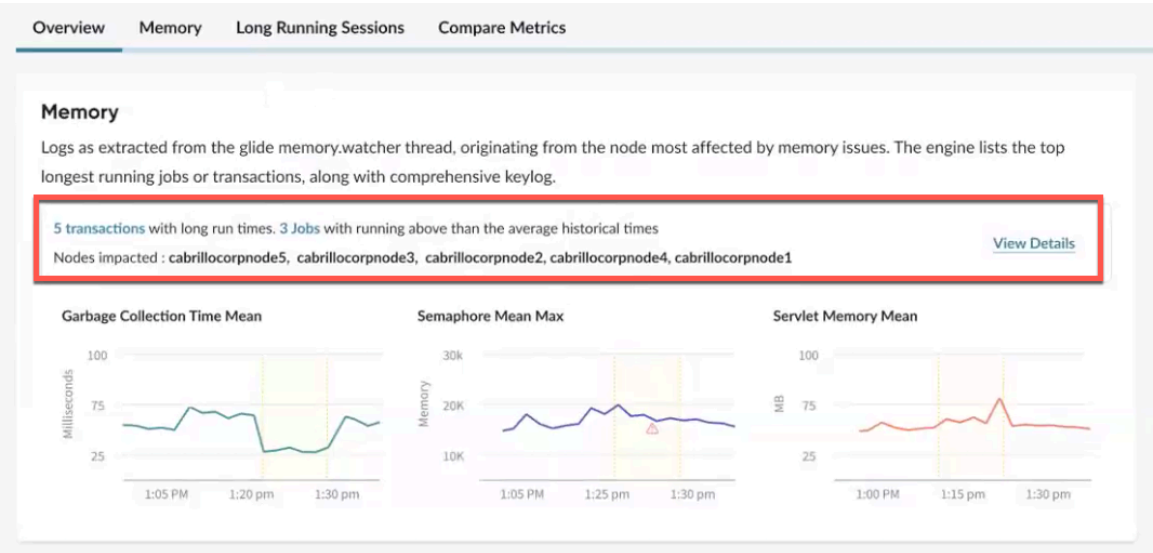
3. Hover over an alert icon for general information about the anomaly.
4. Select **Generate Root Cause** to open the Root cause correlation (RCC) history table.
5. Select an entry to view the Summary of the root cause and metrics charts of where a potential issue may exist.

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- **Summary of the root cause correlation chart**

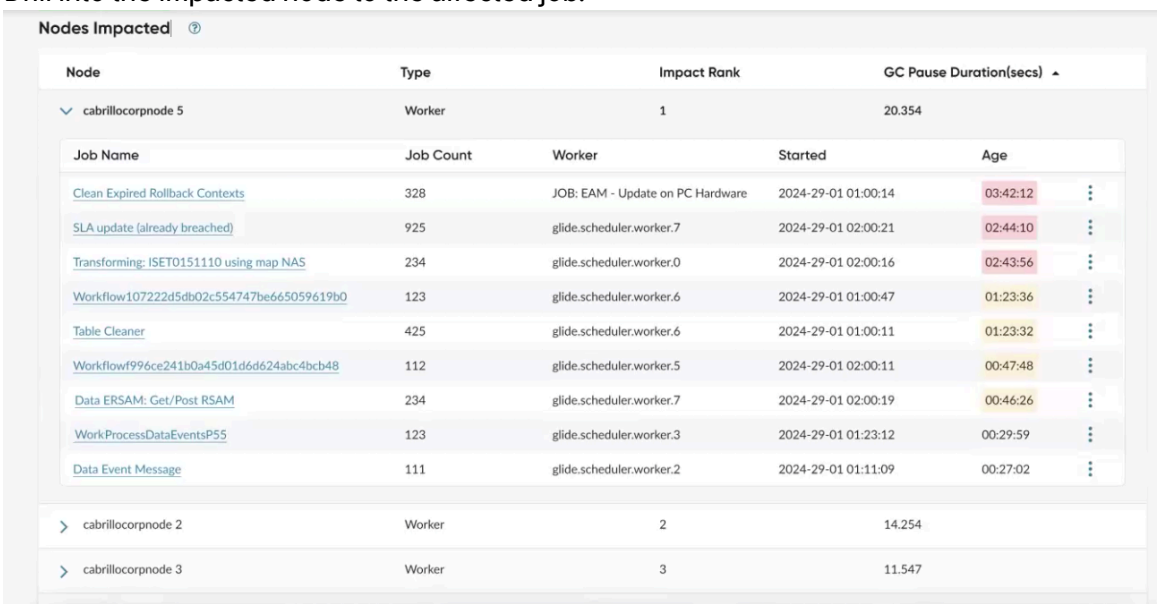


- **Metrics charts**



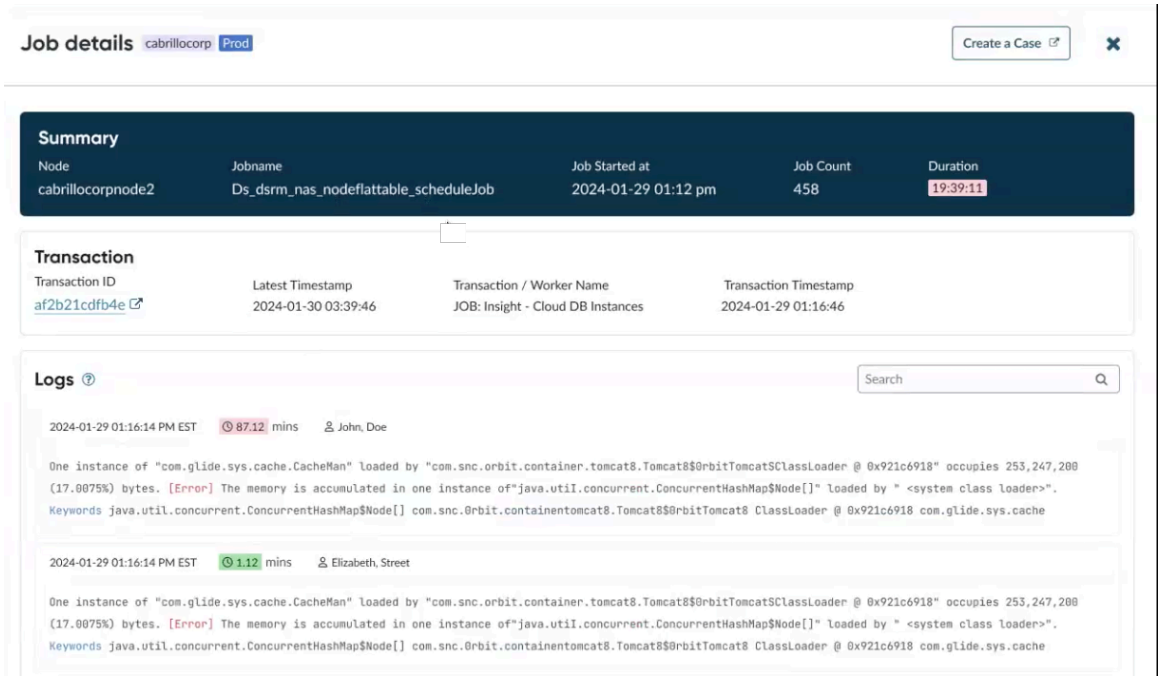
  - The available menu options vary based on the type of root cause correlation.

6. Sort the table by Created Date/Time to view the most recent entries chronologically.
7. Drill into the impacted node to the affected job.



8. Select the job to open the job details with granular transaction and log information.

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9. For further investigation, select **Create a Case** and submit the captured summary information.

Set an alert to monitor the average response time of applications

Set an alert to monitor the application performance when the average response time of applications that run on an instance exceeds the configured threshold.

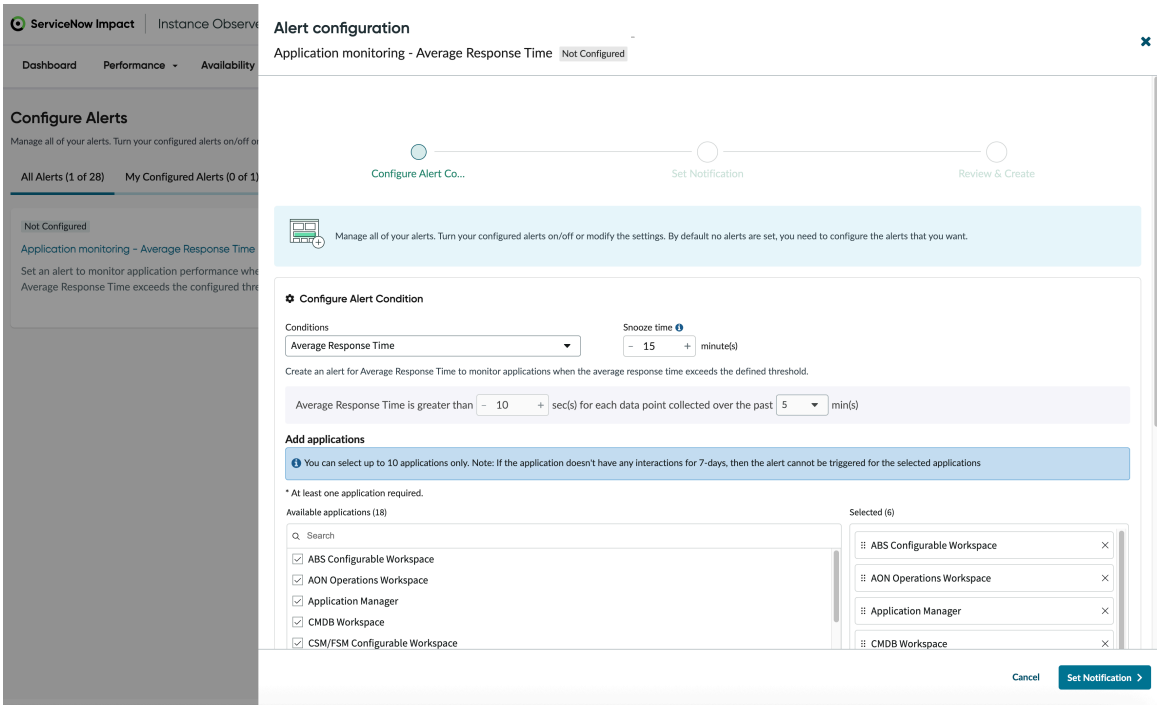
Before you begin

Role required: admin

Procedure

1. Navigate to **Impact** > **Platform Health** > **Monitor** > **Go to Instance Observer**
2. Log in to Instance Observer and navigate to **Alerts** > **Configure alerts**.
3. Select an instance in the **Instance** list.
4. In the **Search alerts** field, enter `Application monitoring`.
5. Select the **Application monitoring – Average Response Time** alert card.
6. In the Edit alert configuration slide on page, set the conditions by setting up a **Snooze time**. The minimum snooze time is 15 minutes.
7. Set the values in the **Average Response Time in seconds for each data point collected over the past mins** fields so that the alert is set when the response time exceeds the time frame for each data point collected over the past minutes that you have configured.
8. In the **Add applications** section, search from the **Available applications** and select those applications for which you want to trigger the average response time alert.
   All the selected applications appear in the **Selected** section. You can select a maximum of 10 applications and a minimum of one.
9. Select **Simulate** to get a list of simulated applications.
   The list shows the applications with average response time collected from the data. Setting this alert On with selected applications enables you to monitor their performance.

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10. Select **Set Notification**.
    To set notification, see the Set notification step of Configure Key Alerts.

Track instance performance with the top six timely alerts – Guided users

Use the Instance Observer alerting feature to receive notifications on the performance of your instance. Monitor the alerts that are system driven.

Before you begin

Role required: admin

About this task

If you're an Impact Guided tier customer, then the important top 6 and commonly used alerts are available for you. You can configure alerts and customize the types of notifications on instances to receive timely alerts that enable you to monitor the instance performance.

Procedure

1. Navigate to **Impact** > **Platform Health** > **Monitor** > **Go to Instance Observer**.
2. Log in to Instance Observer and navigate to **Alerts** > **Configure Alerts**.
   The alert cards listed are:
   a. Response Time – Instance
   b. Event Queue
   c. Database Response Time
   d. Default Semaphore (Mean)
   e. Default Semaphore (Queue Depth)
   f. Long Running Jobs
3. To configure an alert, select the alert name.
4. In the **Configure Alert Condition** section of the slider page, select a value from the **Conditions** list to configure alert condition.

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You can select the conditions, set the threshold, duration to monitor the condition, and the snooze time in increments of five minutes.

5. To simulate the configured conditions, select **Simulate Chart**.
6. To set a notification rule, select **Set Notification** and select a rule.
7. To create a notification rule, navigate to **Alerts** > **Configure Notification** and select **Create Rule**.
   You can create a **New Rule** by giving a name and description. You can configure the **Notification Type** by selecting one or more from the options available such as Email, SMS, ServiceNow Integration, and third party integrations. If there are third-party integrations such as AWS, Google Cloud, or Azure an automated notification is sent to the specific URL as a webhook alert.

   You can set the rule conditions as default, which take precedence over all other conditions of a default rule.

   You can also select your users to whom you want the notifications to be sent by selecting the **Add custom recipients** option.

8. Select **Save**.
   For more information on configuring alerts and setting notifications, see Configure Key Alerts.

Use popular alerts to receive notifications – Advanced and Total users

Get started with the popular alerts that are most widely used to receive notifications about your instance performance if you're new to the Instance Observer (IO) alerting system. The most popular alerts appear on the first page of your Configure Alerts page.

Before you begin
Role required: admin

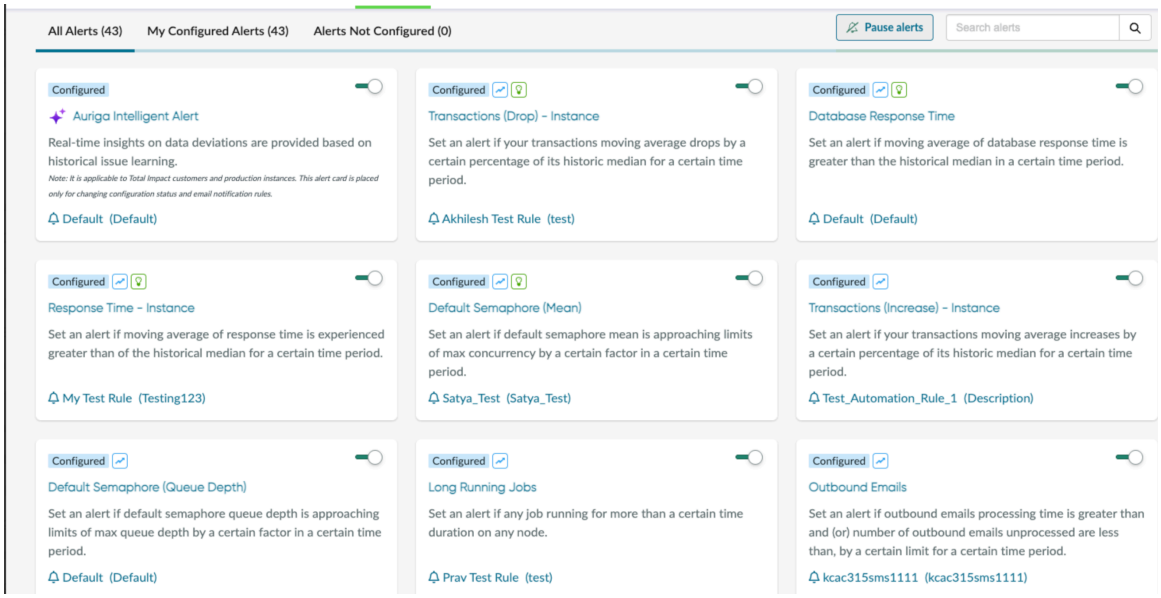
About this task
Out of the 45 or more alerts that are available, the most popular ones are listed for you to get started with the IO alerting system. To view the rest of the alerts, navigate to the subsequent pages in the pagination list of the user interface. You can configure alerts and customize the types of notifications on your instances to receive timely alerts that enable you to monitor the instance performance.

Procedure

1. Navigate to **Impact** > **Platform Health** > **Monitor** > **Go to Instance Observer**.
2. Log in to Instance Observer and navigate to **Alerts** > **Configure Alerts**.
   If you're an Impact Advanced or Total tier customer, then the eight most popular alerts that are trending and commonly used appear on the first page of Configure Alerts page under **All Alerts** tab. Alert cards that have  icon are the most popular ones.

   Note: None of the alerts is configured by default. You must configure them for them to appear in the **My Configured Alerts** tab for your reference. Alerts that you have not configured appear in the **Alerts Not Configured** tab.

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System-recommended alerts indicated by icon are generated by advanced statistical analysis on four weeks of instance data. They're tailored to your environment and recommended for you.

3. To configure an alert, select icon in the alert card.
   If you don't want the alert to be configured, then select the icon that works as a toggle. After you toggle the icon, the **Not Configured** tag appears on the alert card.

4. Hover over , which indicates that it's a popular alert, and select to customize your alert and notification preferences.

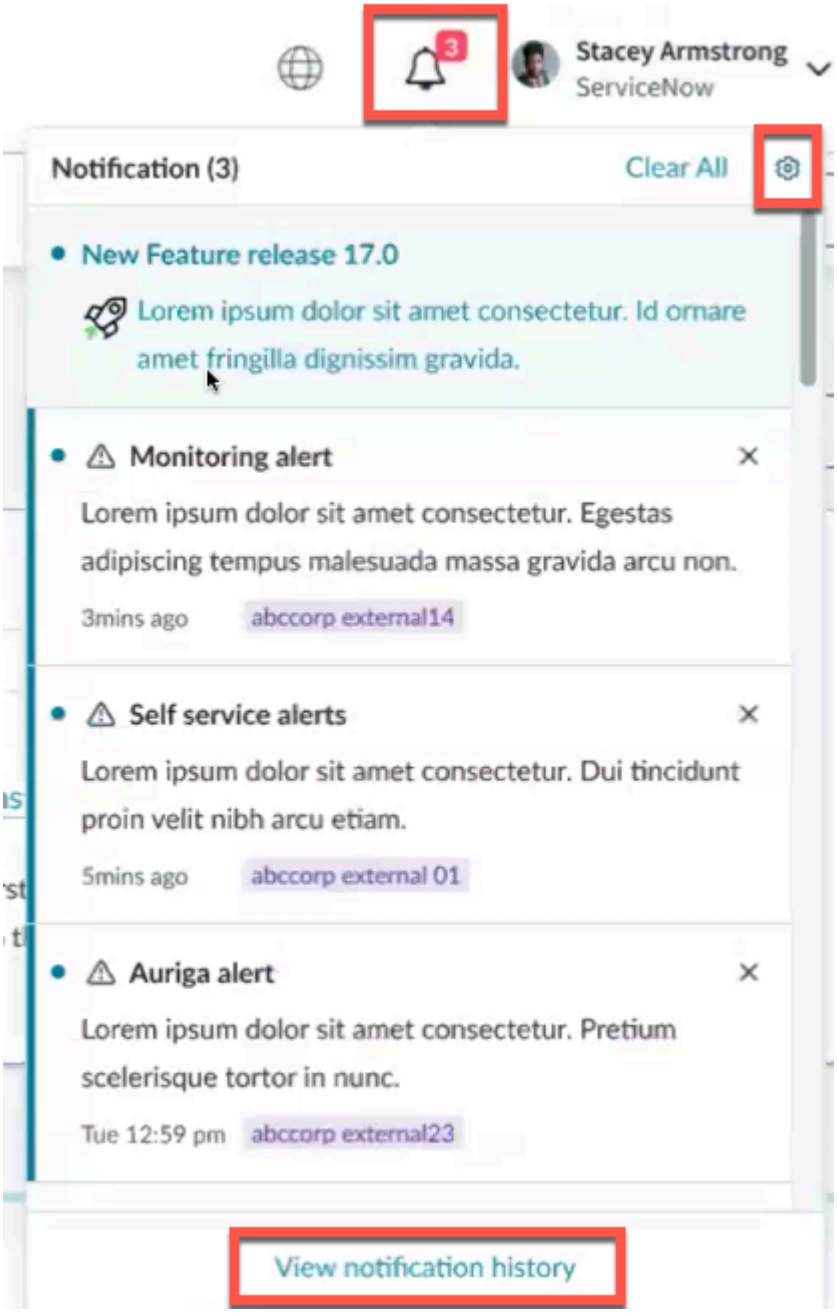
Instance Observer Notifications

Notifications for alerts and other system activity are displayed on the Instance Observer banner.

A notification indicator is available allowing direct access to the in app notifications that are sent to user email or SMS accounts, such as alerts and new releases.

- Access the record directly to see the details.
- Use Notification History to view the entire list from the last 72 hours.
- Clear the alerts from the notification panel.
- Access notification settings for Intelligent alerts and Monitoring alerts from the panel.

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The bell ( ) icon notifies you about new feature releases (IO Release Notes) and alerts from Auriga, Self Service, and Monitoring. You can enable or disable notifications using the gear ( ) icon.

The icon displays the number of new notifications, and clicking it opens a pop-up with up to 25 recent notifications, with excess moved to history. The last two feature releases and critical Auriga alerts are pinned at the top. You can open specific pages for new releases, Auriga, Self Service, and Monitoring alerts.

Notifications can be dismissed, marked as read, and managed through options to clear all or view history, which retains unread notifications for 72 hours and read ones for 7 days. The **View notification history** includes filtering and search capabilities by Instance, status, metric, and notification type.

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Configure long pending jobs alert by job priority

Get notifications when jobs that are pending exceed your defined overdue thresholds by configuring the **Long Pending Jobs** alert. Set up conditions by job priority to take action on groups of jobs—such as all discovery jobs or system cleanup jobs—in one go, rather than managing them individually.

Before you begin

Role required: admin

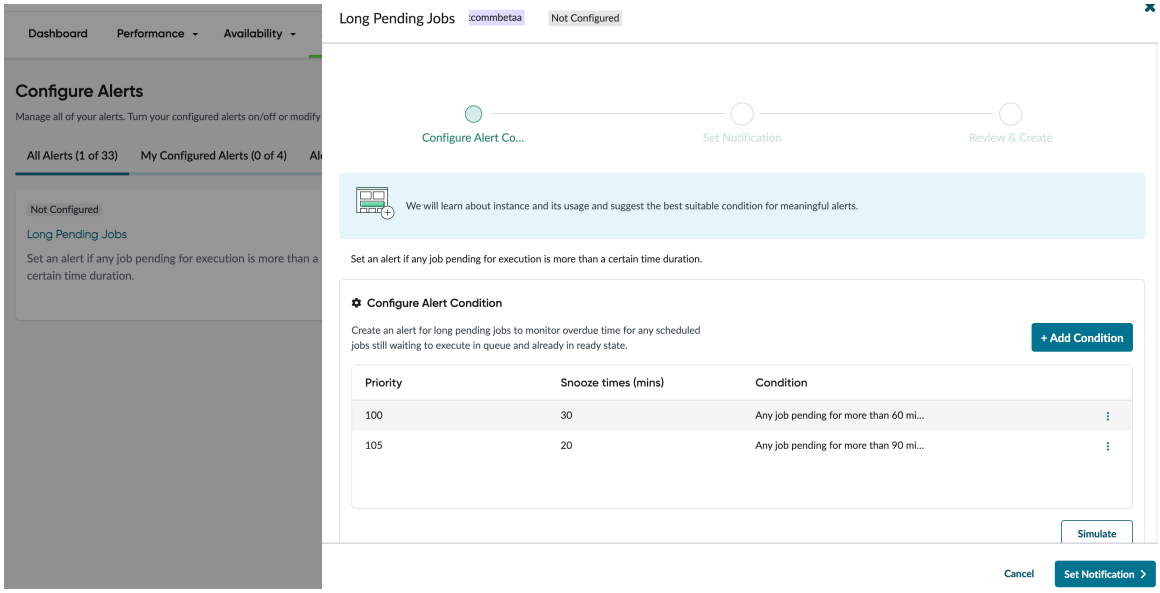
Procedure

1. Navigate to **Impact** > **Platform Health** > **Monitor** > **Go to Instance Observer**.
2. Log in to Instance Observer and navigate to **Alerts** > **Configure Alerts**.
   For more information on how to configure alerts, see Configure Key Alerts.
3. In the **Search** field of the **All Alerts** tab that displays by default, enter `long pending jobs`.
4. Select **Long Pending Jobs** card.
5. Select **+ Add Condition** button to open the Create a Condition pop-up.
6. Select **Long Pending Jobs** from the list in the **Conditions** field.
7. In the **Snooze time** field, set a time period in minutes before a repeat alert is triggered.
   For example, a snooze time of 30 minutes means you won't receive a follow-up alert for the same condition until 30 minutes have passed.
8. In the **Any job pending for more than** field, set your tolerance threshold in minutes.
   For example, enter 60 if you want to be alerted when any job has been pending for more than 60 minutes. Use the `+` and `–` controls to adjust the value.
9. Select the job priority you want to monitor in the **Select a Priority** field.
   All jobs have a priority attribute assigned to them. Use this field to group and act on jobs by priority. For example, priority 110 for discovery jobs or priority 100 for test jobs.
10. Select **Save**.
    You're not limited to a single condition. Select **+ Add Condition** again to add conditions for additional priorities, each with its own threshold and snooze time.

    For example, you can configure:

    - Priority 100 — alert if any job is pending for more than 5 minutes.
    - Priority 110 — alert if any job is pending for more than 80 minutes, with a 30-minute snooze.

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All configured conditions work on an OR basis. A notification is triggered when any one or more conditions are met.

11. Select **Simulate** to preview how many alerts your configured conditions would have generated over the past 7 days.
    Use this option to validate your thresholds before going live with your alerts.
12. Select **Set Notification** button and in the Set Notification section, select your preferred notification rule.
    Notifications can be delivered via Email, SMS, ServiceNow (webhook integration), or Third Party (external integrations).
13. Select **Review & Create**.
14. Select **Create Alert**.
    The alert is active after you save. When a configured condition is met, you receive a notification that includes the job priority and the specific job names that breached the threshold. For example, Job X (Priority 100) has been pending for more than 100 minutes.

Configure IO alert notifications for a ServiceNow instance

Set up a basic integration between Instance Observer (IO) and ServiceNow to route IO alert notifications to a ServiceNow instance.

Before you begin

Role required: admin

About this task

In addition to email and SMS notifications, you can send IO alert notifications to your ServiceNow instances.

Procedure

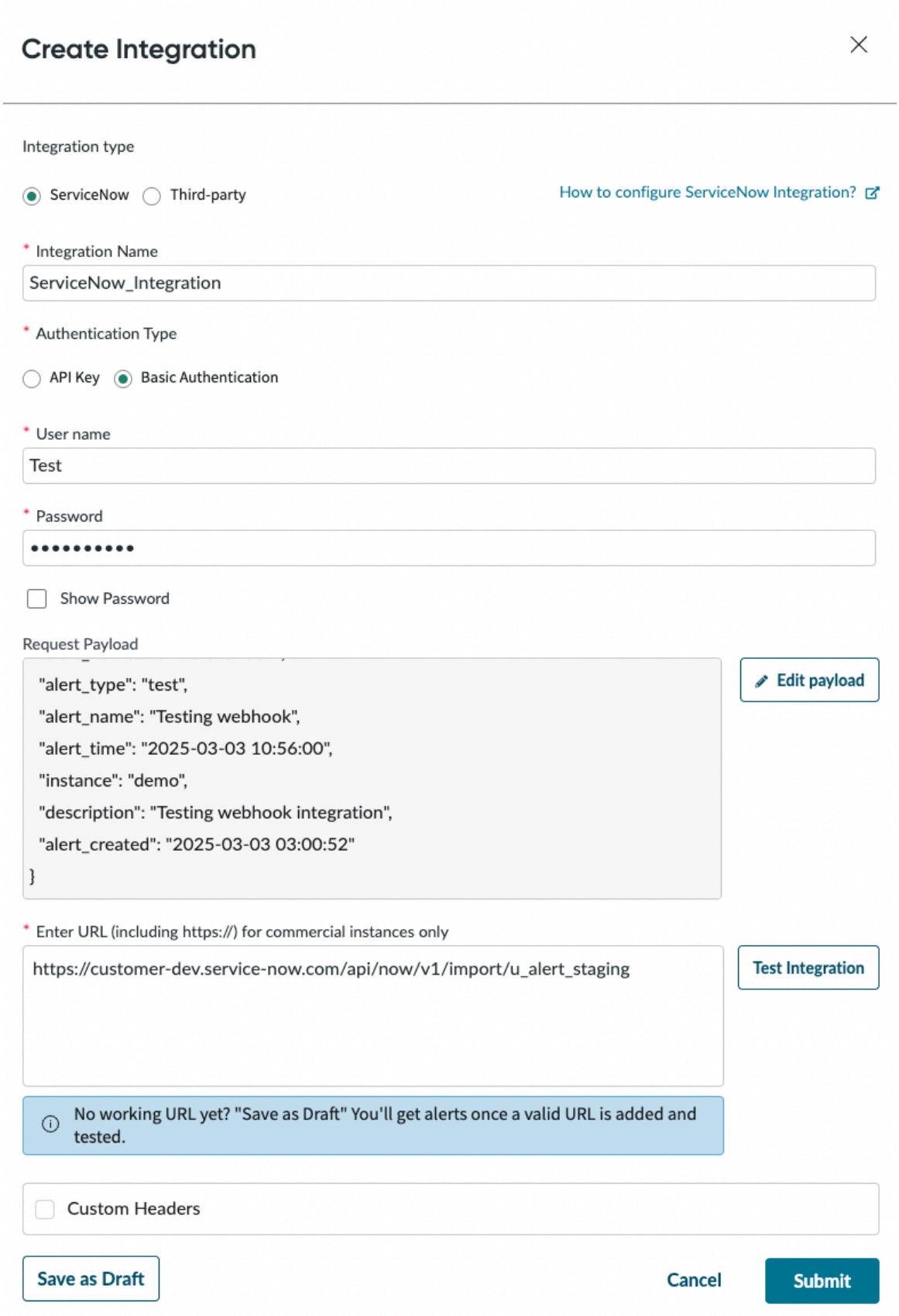
1. Navigate to **Impact** > **Platform Health** > **Monitor** > **Go to Instance Observer**.
2. Log in to Instance Observer and navigate to **Alerts** > **Configure Notification**.
3. Select **+ Create Integration**.
4. On the form, fill in the fields.
   For a ServiceNow integration, enter the following:

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Create Integration form

Field	Description
Integration type	ServiceNow is selected by default.
Integration Name	Name to identify the integration.
Authentication Type	Basic Authentication or an API key for the integration. For API Key, provide the key or username and password for the integration.
User name	User name associated with the integration.
Password	Password for the integration.
Enter URL	Webhook URL as configured on the ServiceNow instance. **Note:** This URL is for commercial instances only. Create a webhook and web service while selecting the appropriate authentication access using your ServiceNow instance admin role. For more information, see Create a scripted REST API

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5. Select **Test Integration** to validate your configuration and verify if you can successfully send the payload to the configured ServiceNow instance.

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If you do not have the correct URL details at hand, you can save the integration as **Draft** and return to complete it later.

- If the test is successful, you receive a HTTP `response 200 is successful` response. You can now proceed to submit the integration.
- If the test fails, an error message is displayed in red. Review and correct your integration details—such as the webhook URL, username, or password—and test again.

> **Important:** A successful test result is required before you can submit the integration. If you attempt to submit without testing, a validation message is displayed: `Successful Test Integration results required to submit your integration, or save as draft if you don't have a working URL.`

6. **Submit** the integration and save it when the test is successful.
   The integration is created with a status **Enabled**.
7. Verify the integration status.
   In the **Integrations** tab, confirm that the integration status shows as **Enabled**.

   > **Note:** Only integrations with an **Enabled** status appear in the **Notification Rules** tab to link with the notification rule. Draft integrations are not available for selection until they are completed and enabled.

8. Link the integration to a notification rule and enable configuration for the notification rule by navigating to the **Notification Rules** tab and selecting the appropriate notification rule.

   You can also select ••• and select the **Edit** option. Once the integration is in **Enabled** status, it is available for selection in the **Notification Rules** list.

   a. Enter a name for the rule in the **Name** field of the Edit Rule pop-up.
   b. Enter a description for the notification rule.
   c. Select the ServiceNow Integration option as the **Notification Type** and select a value from the list.
   d. Select **Save**.
9. Verify alert payload delivery in the **Alert Console** by navigating to **Alerts** > **Alert Console**.
   To confirm that your integration is working correctly after an alert is triggered:

   a. Select your instance and **Get Snapshot** in the **Alert Console**.

   b. From the **Generate Test Alert** list, select the alert you configured.
   The test alert that you configured appears in the list. For example, **Database Response Time** alert on your instance.

   c. Verify that the alert payload is successfully delivered to the configured integration endpoint, which is ServiceNow instance.
   The alert payload reaches the ServiceNow instance so long as the webhook URL is still accepting http calls.

   d. Navigate to your ServiceNow instance and check if the alert has reached its destination.
   If the alert had failed, then the **Alert Type** is in red, which means it has failed.

10. Identify and resolve integration failures.

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If an integration fails after it has been enabled, for example, due to an expired webhook URL, an invalid API key, or expired credentials, then IO detects the failure and flags it for your attention. To identify and resolve a failed integration:

a. In the **Alert Console**, look for alerts displayed in red under the **Alert Type** column. A red indicator means the alert payload failed to deliver the notification.

b. Select the **Failed** link to view the full error details. For example, a 404 error indicating that the URL is invalid or the API key has expired.

c. Select **Update Integration** to edit the integration with the correct credentials or webhook URL, test it successfully, and resubmit to restore the integration to **Enabled** status.

d. Alternatively, you can navigate to **Alerts** > **Configure Notification**, and select the integration with Failed status in the **Integration** tab. **Edit** the integration configuration, test the integration, and when it is successful, resubmit it to restore the integration to the Enabled status.

The **Delete** option remains inactive if the integration is associated with at least one notification rule.

Important: Until the integration is fixed and re-enabled, alert payloads will not be delivered to the failed endpoint.

IO alert notification channels

You can view the integration failures as alerts in three places:

a. As **Alert Type** in **Alert** > **Alert Console**

b. As Notifications from  . Select **View Notification History** and filter with `Integration Failed`.

c. As an email notification with the integration name, error number, and the message.

Configure IO alert notifications for a third-party application

Set up a basic integration between Instance Observer (IO) and third-party integrations to route IO alert notifications to an external system in addition to emails and SMS.

Before you begin

Role required: admin

Important: Third-party integrations are not supported in Regulated Market.

About this task

Note: Third-party integrations support platforms such as Slack, Microsoft Teams, AWS, GCP, and Azure.

For Third-party integrations, webhook URLs may expire if a subscription is not renewed, or API keys may be invalid over time. Ensure that your integration credentials are kept up to date to avoid missed alert deliveries.

Procedure

1. Navigate to **Impact** > **Platform Health** > **Monitor** > **Go to Instance Observer**.
2. Log in to Instance Observer and navigate to **Alerts** > **Configure Notification**.
3. Select **+ Create Integration**.
4. On the form, fill in the fields.

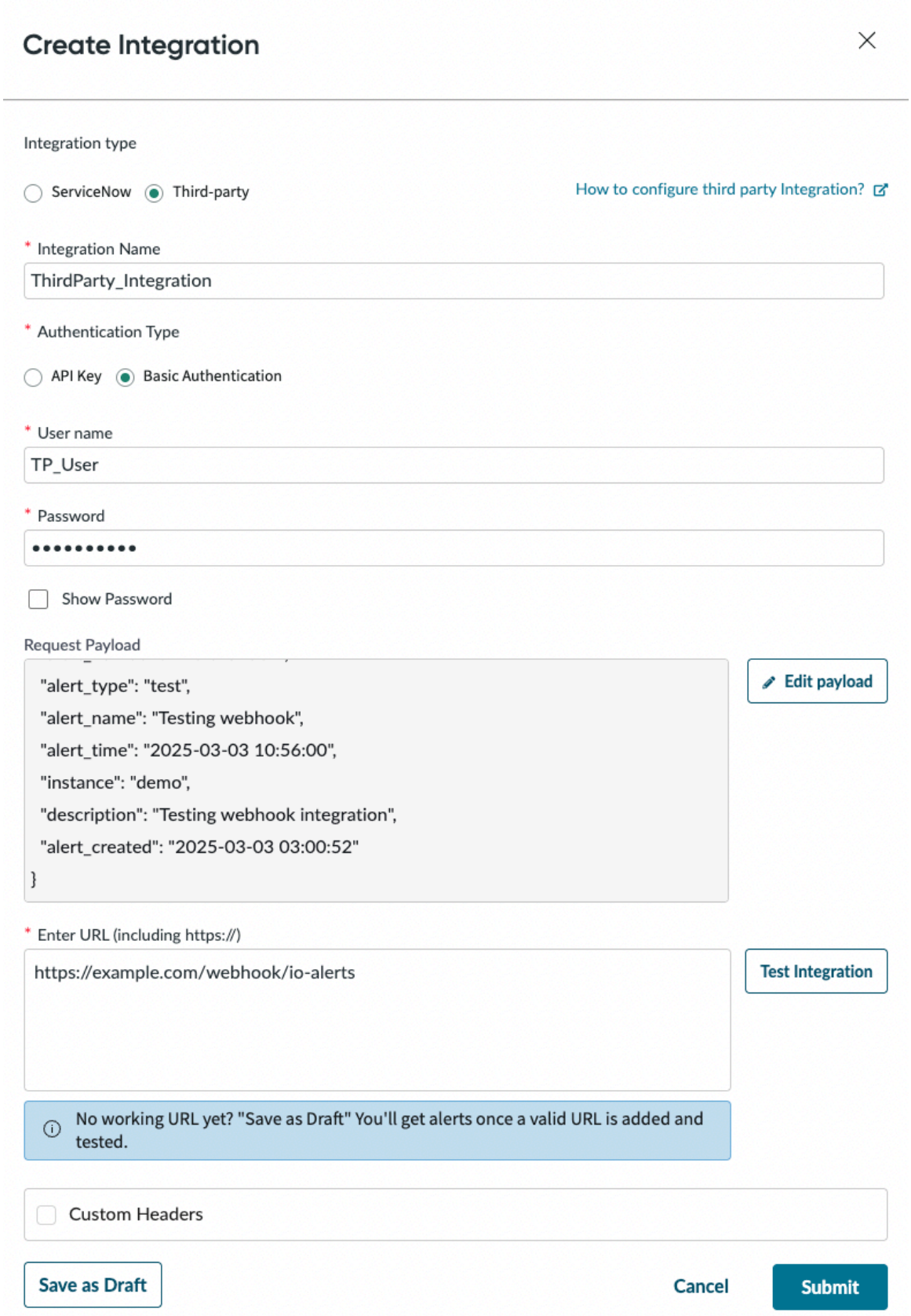
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For a third-party integration, enter the following:

Create Integration form

Field	Description
Integration type	Third-party. ServiceNow is selected by default.
Integration Name	Name to identify the integration.
Authentication Type	Basic Authentication or an API key for the integration. For API Key, provide the key or username and password for the integration.
User name	User name associated with the integration.
Password	Password for the integration.
Enter URL	Webhook URL as configured on your third-party (external) application. For more information, see Create a scripted REST API

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5. Select **Test Integration** to validate your configuration and verify if you can successfully send the payload to the configured application.

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If you do not have the correct URL details at hand, you can save the integration as **Draft** and return to complete it later.

- If the test is successful, you receive a HTTP `response 200 is successful` response. You can now proceed to submit the integration.
- If the test fails, an error message is displayed in red. Review and correct your integration details—such as the webhook URL, username, or password—and test again.

> **Important:** A successful test result is required before you can submit the integration. If you attempt to submit without testing, a validation message is displayed: `Successful Test Integration results required to submit your integration, or save as draft if you don't have a working URL.`

6. **Submit** the integration and save it when the test is successful.
   The integration is created with a status **Enabled**.
7. Verify the integration status.
   In the **Integrations** tab, confirm that the integration status shows as **Enabled**.

   > **Note:** Only integrations with an **Enabled** status appear in the **Notification Rules** tab to link with the notification rule. Draft integrations are not available for selection until they are completed and enabled.

8. To configure a notification rule for the third-party integration and send alerts to third-party applications, select the **Notification Rules** tab.
   a. Select ••• for the notification rule, and select the **Edit** option.
   b. Enter a name for the rule in the **Name** field of the Edit Rule pop-up.
   c. Enter a description for the notification rule.
   d. Select the **Third Party Integration** option as the **Notification Type** and select a value from the list.
   e. Select **Save**.
9. Verify alert payload delivery in the **Alert Console** by navigating to **Alerts** > **Alert Console**.
   To confirm that your integration is working correctly after an alert is triggered:
   a. Select your instance and **Get Snapshot** in the **Alert Console**.
   b. From the **Generate Test Alert** list, select the alert you configured.
   The test alert that you configured appears in the list. For example, **Database Response Time** alert on your instance.
   c. Verify that the alert payload is successfully delivered to the configured integration endpoint, which is third-party instance.
   The alert payload reaches the third-party instance so long as the webhook URL accepts the HTTP calls.
   d. Check if the alert with the specified payload has reached its intended destination.
   If the alert had failed, then you will see that the **Alert Type** is in red, which means it has failed. On selecting the failed **Self-Service** alert icon you will see the message **Third Party Integration – Failed**.

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10. To view, edit, or delete the URL in the Edit Integration pop-up, navigate back to **Alerts** > **Configure Notifications** and select ••• for the integration.
    You can update the integration settings by selecting the **Edit** option. The **Delete** option remains inactive if the integration is associated with at least one notification rule.
11. Identify and resolve integration failures.
    If an integration fails after it has been enabled, for example, due to an expired webhook URL, an invalid API key, or expired credentials, then IO detects the failure and flags it for your attention. To identify and resolve a failed integration:
    a. In the **Alert Console**, look for alerts displayed in red under the **Alert Type** column. A red indicator means the alert payload failed to deliver the notification.
    b. Select the **Failed** link to view the full error details. For example, a 404 error indicating that the URL is invalid or the API key has expired.
    c. Select **Update Integration** to edit the integration with the correct credentials or webhook URL, test it successfully, and resubmit to restore the integration to **Enabled** status.
    d. Alternatively, you can navigate to **Alerts** > **Configure Notification**, and select the integration with Failed status in the **Integration** tab. **Edit** the integration configuration, test the integration, and when it is successful, resubmit it to restore the integration to the Enabled status.

    The **Delete** option remains inactive if the integration is associated with at least one notification rule.

    Important: Until the integration is fixed and re-enabled, alert payloads will not be delivered to the failed endpoint.

    IO alert notification channels

    You can view the integration failures as alerts in three places:

    a. As **Alert Type** in **Alert** > **Alert Console**
    b. As Notifications from 24. Select **View Notification History** and filter with `Integration Failed`.
    c. As an email notification with the integration name, error number, and the message.

Custom payload in alerts integration

Instance Observer integrations enable you to define and manage custom JSON request payload for ServiceNow and third-party integrations.

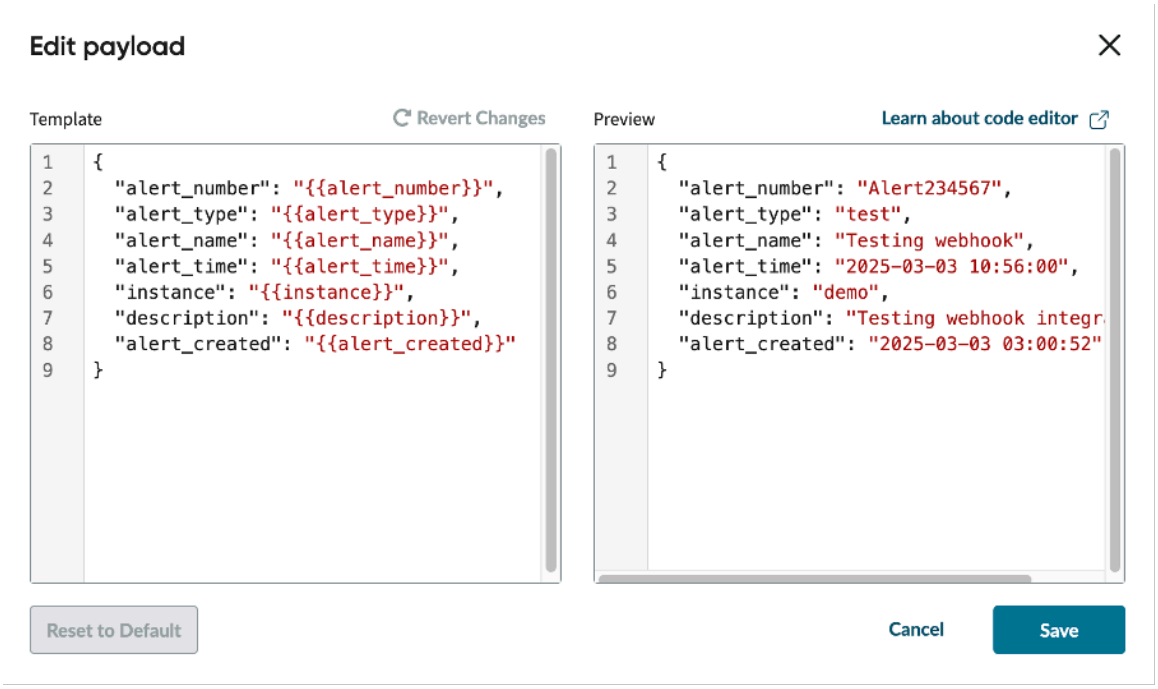
You can now include additional fields in notification payloads, exclude specific data that is not required by the target system, format the payload to align with specific third-party API requirements or internal business logic, eliminating the need for complex scripted REST APIs on the customer side.

- Use either the default payload or customize it to include additional data as needed.
- Modify the default payload, if needed, which is displayed in the Editor window on the left.
- Modify either the key or the value, or both as each parameter consists of a key and a value.
- The Preview section on the right displays the expected JSON payload after rendering.
- If the JSON is invalid, errors are highlighted, and the option to save is disabled.

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Default mustache payload template

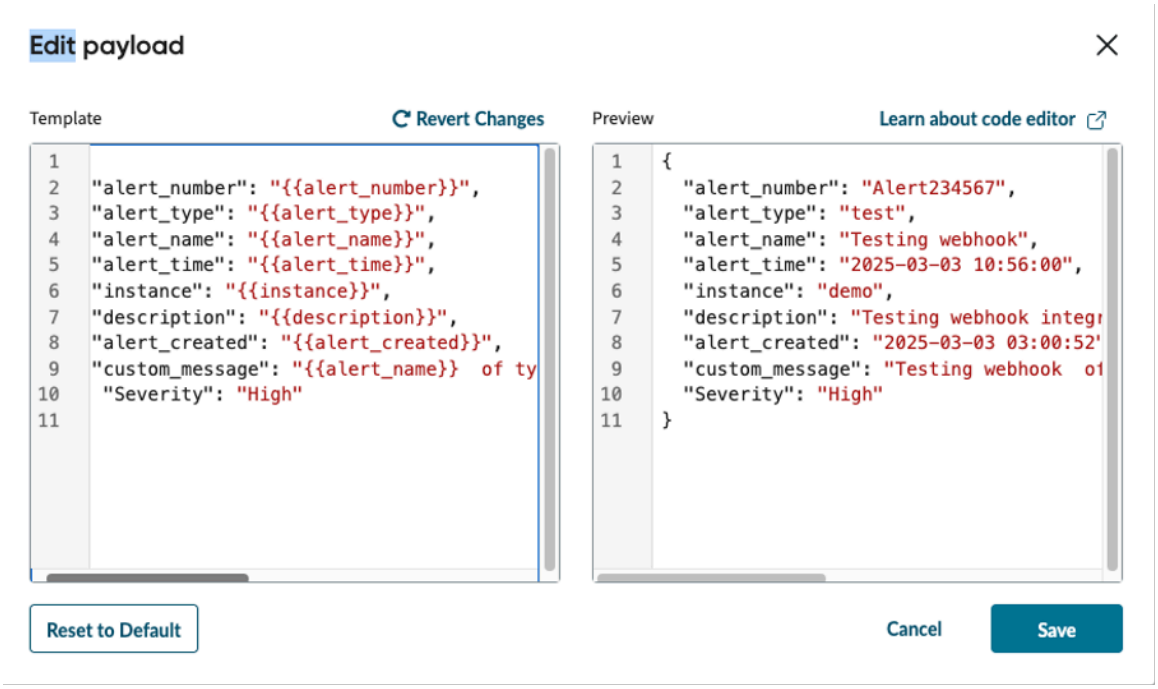
```
{
  "alert_number": "{{alert_number}}",
  "alert_type": "{{alert_type}}",
  "alert_name": "{{alert_name}}",
  "alert_time": "{{alert_time}}",
  "instance": "{{instance}}",
  "description": "{{description}}",
  "alert_created": "{{alert_created}}"
}
```



Example: Default Payload + Custom Parameters

```
{
"alert_number": "{{alert_number}}",
  "alert_type": "{{alert_type}}",
  "alert_name": "{{alert_name}}",
  "alert_time": "{{alert_time}}",
  "instance": "{{instance}}",
  "description": "{{description}}",
  "alert_created": "{{alert_created}}",
  "Custom_message": "{{alert_name}}' of type {{alert_type}}
 generated for {{instance}} at {{alert_time}}. Please review.",
  "Severity": “High”
}
```

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Custom parameters and limits

The **custom_parameter** field allows you to insert custom message into the JSON template, you can also use the existing parameters as shown in the custom parameter samples.

The limitations are:

- Required: At least one and at most 20 parameters to save the template.
- Maximum: 13 custom parameters.
- If exceeded, a warning appears: `Template must have at least one default key and up to 20 keys. Adjust or select 'Reset to Default' to apply defaults.`

Samples of custom parameters for syntax reference

"Information": "An alert {{alert_name}} has been triggered for {{instance}} at {{alert_time}} Description: {{description}}"

"Alert_message": "New alert '{{alert_name}}' of type {{alert_type}} generated for {{instance}} at {{alert_time}}. Please review."

"Event_type": "Severity-High! An alert {{alert_name}} has been triggered for {{instance}} at {{alert_time}} Description: {{description}}"

Third-party request body mapping

Some third-party integrations require specific key names. You can modify the default payload to match their expected format.

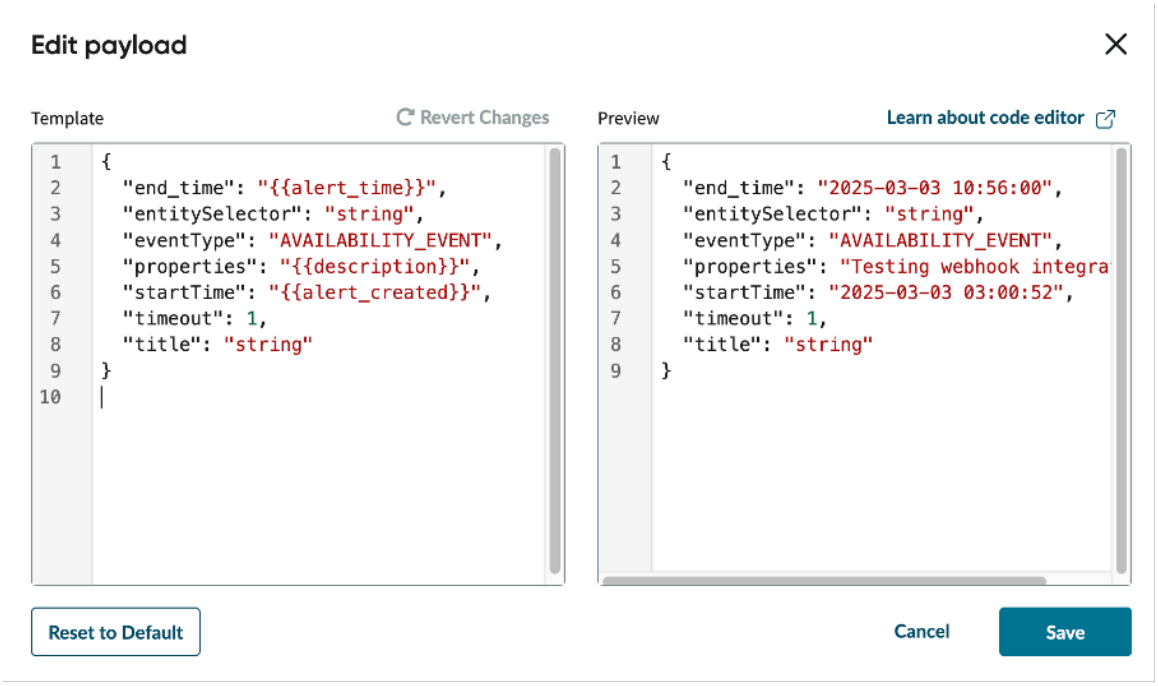
Example: Third-party request body:

```
{
  "endTime": 1,
  "entitySelector": "string",
  "eventType": "AVAILABILITY_EVENT",
  "properties": {},
```

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```
  "startTime": 1,
  "timeout": 1,
  "title": "string"
}
```

Modified IO payload to match third-party format



Actions and validation

Revert Changes

Restores the last saved content.

Reset to Default

Resets the template to its default payload.

Syntax Validator

Ensures JSON validity before saving. Errors prevent saving.

Test Integration

Sends a sample notification to verify webhook integration.

Generative AI powered Root cause analysis

Root cause analysis in Instance Observer provides automated detection and summarization of issues. It includes built-in root cause correlation and root cause summary using a large language model (LLM), which helps reduce troubleshooting time, improve incident transparency, and generative AI driven root cause recommendation by analyzing similar historical incidents.

Important: The Generative AI-powered summarization and recommendation components aren't available to users in the regulated market. However, the core Root cause correlation (RCC) functionality is being offered under the revised name of Root Cause Analysis (RCA) to promote product consistency and alignment across all markets.

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Overview of Root Cause Analysis (RCA)

RCA automatically identifies and explains the origin of incidents by analyzing multiple telemetry signals. Signals included are related to Memory, Database, Transactions, Cache flush, and Sessions. This analysis enables teams to detect issues faster and resolve them more accurately by correlating relevant anomalies and generating human-readable summaries and recommended resolutions.

Benefits of RCA

- Reduced Mean Time To Detect (MTTD) or Mean Time To Repair (MTTR) through quick signal grouping and summarization.
- Actionable summaries for faster remediation or automation.
- Recommended resolutions by analyzing similar historical incidents.

For more information, see Instance Observer performance insights.

Root Cause Correlation (RCC)

RCC feature intelligently analyzes logs, metrics, and performance data to identify relationships and dependencies between anomalies automatically. By correlating signals across different performance metrics, it helps you to isolate quickly the origin of an issue with minimal manual effort. This correlation eliminates noise and narrows down the likely root cause from a sea of signals.

LLM-based Root Cause Summary (RCS)

As soon as correlated data are identified, an LLM is invoked to generate a concise, human-readable summary. The LLM processes both structured and unstructured telemetry data to provide clear insights into the likely root cause and affected components.

The transaction with ID XXXXXX for URL/sys_XXX.do has exceeded the maximum execution time, resulting in a cancellation. The total time taken for this transaction was 0:04:59.044, with processing time of 0:04:59.041 and CPU time of 0:00:07.775. The transaction was initiated by user XXXX. The SQL time was 0:00:50.154, with 4,836 queries executed.

Total processing time of 1095 secs for URL sys_XXX.do. EXCESSIVE processing time of 0:02:37.194 for ListRecordDefaultTag. Slow silent evaluate for: __ref__.canRead() took 0:00:02.475. A large amount of data has been streamed: 1,048,578 bytes by StreamingBytesSizeHandler. Total processing time of 1095 secs for URL sys_XXX.do.

LLM-based Root Cause Recommendation (RCR)

Instance Observer provides AI-powered recommended resolutions by analyzing similar historical incidents for the same instance. The system makes reference to case tasks that were successful in the past to resolve comparable issues and suggests them as the most likely remediation steps.

LLM-based RCR also provides:

Personalized guidance

Recommendations are tailored to the instance and service based on past resolution history.

Case task linking

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Direct reference to earlier case tasks ensures that you can review proven fixes rather than starting from scratch.

Human-in-loop validation

Recommendations are advisory in nature; operators must validate and apply them according to their standard operating procedures (SOPs).

This component reduces trial-and-error in incident response and ensures knowledge reuse across recurring patterns.

Review the query SELECT fcr.u_XXXX_approval_status AS fcr_u_w7e_XXX_status, taskslatable.time_left and optimize it by adding indexes or rewriting it for better performance, similar to the solution proposed in Incident ID CSXXXXXX, where indexes were suggested to be added to the tables to improve query performance.

Note: RCA is a deterministic model. Therefore, you may not see an RCA report for every alert, or Critical or Warning performance scenario. In cases where the model doesn't have sufficient or relevant data to generate a result, you can continue to rely on traditional manual analysis.

Root cause correlation

Root Cause Correlation (RCC) finds a root cause by automatically correlating metrics, logs, and event information for supported symptoms on production instances for the last 24 hours.

RCC symptom categories

The RCC feature is available for self-service alerts and Critical or Warning performance symptom categories:

- Memory
- Longest running sessions
- Slow transactions
- Cache flush
- Database locks
- Database impacts

The table describes the symptom categories and the corresponding alerts that the RCC engine detects.

Targeted symptoms categories and corresponding alerts

Symptoms categories	Description	Corresponding alert
Database Impact	Helps you to identify and address extended SQL queries impacting database performance, tied to high execution time, or increased volumes. The query patterns give snapshots of 30-minute and 60-minute durations from the time that the impact is observed on query execution times.	Database response time
Cache Flush	Cache flushes and node restarts are detected, as well as high service saturation levels that may have occurred around the time a performance alert was triggered.	Default semaphore mean

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Targeted symptoms categories and corresponding alerts (continued)

Symptoms categories	Description	Corresponding alert
Longest Running Session	• Searches for the top long-running sessions in mean time to recover (MTTR) logs • Identifies the top transaction pattern hash with the highest processing times and then the transaction IDs.	Default semaphore mean
Slow Transactions	• Identifies the top long-running transactions using the total duration, including ACL time, SQL time, CPU time, processing time, BR time, and script time. • Returns the transaction IDs, the pattern hash, and these metrics to help you identify the specific causes of long-running transactions.	Default semaphore mean
Memory	• Pinpoints the three nodes most impacted by garbage collection pauses, determined by the aggregate duration of the pauses. • Identifies any transactions or worker threads on these nodes that exceed 200 seconds. **Note:** Users are advised to review these long-running or frequently recurring threads.	Node Garbage Collection Time
DB locks	The RCC engine monitors *innodb_row_lock_waits* and *threads_running* to detect anomalous database lock events that occur when a database operation requires exclusive access.	Threads running

Note: As soon as any of the aforementioned alerts or Critical or Warning performance are identified, the system automatically generates an RCA report after waiting for a maximum of 10 minutes, depending on the conditions.

Configure Root cause correlation alerts

Configure Root Cause Correlation (RCC) alerts to start receiving the Root Cause Analysis (RCA) reports for these alerts.

Before you begin

Role required: admin

Procedure

1. Navigate to **Impact** > **Platform Health** > **Monitor** > **Instance Observer**.
2. From the **Alerts** menu, select **Alerts Console**.
3. Select a production instance.
4. Select **Get Snapshot**.
   Information about the alerts is listed in the table.
5. Select the reporting options:

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- Instance
- Date range
- Metrics
- Options:
  - Self-Service Alerts
  - Diagnostic Events
- Add-ons

6. Fine tune the alerts using the listed options.
   For example
   - Set a threshold that triggers an alert if the transaction count anomalies persist for more than 10 minutes, or exceeds a certain number of standard deviations from the mean continuously for more than 10 minutes above or below the range, respectively. Job anomalies target the top X % of anomalous jobs based on the execution time and track the details of those jobs.
   - Test and fine tune the alerting by simulating persistence time, choose the window of an anomaly 5, 10, 15 minutes, and so on, or select the top 5, 10, or 15 percentage of jobs and verify that alerts are triggered correctly. Adjust the alert threshold, if necessary, to verify that the system provides meaningful and actionable alerts.
   - Choose the appropriate method for sending alerts based on your requirements, either email notifications, SMS messages, or integration.
   - Continuously monitor the alerts generated by the system. Regularly review the anomalies detected to understand the underlying causes and take appropriate actions, such as investigating potential issues or performing further analysis.

Use the Root cause analysis history

Check the Root cause analysis (RCA) History page to investigate the issues that caused an alert to trigger or performance to degrade to Critical or Warning.

Before you begin

Role required: admin

Procedure

1. Navigate to **Impact** > **Platform Health** > **Monitor** > **Instance Observer**.
2. From the **Alerts** menu, select **Root Cause Analysis History** to display the history of reports for all users in a selected instance for the last seven days.
3. Select an RCA entry to drill further into the issue that caused the alert.
4. From the RCA reports page, select an entry with the icon of Self-Service alert generated (RCC generated).
   Directly link to the issue that caused the alert from the table to further investigate the issue and to rectify the issue.

   Note: The RCA report may also be generated from the Alerts Console.

   You can also access the RCA reports using the Self-service alert icon on the performance pages.

5. **Optional:** Navigate to **Impact** > **Platform Health** > **Monitor** > **Instance Observer**.
6. From the **Alerts** menu, select **Alerts Console**.
7. Select a production instance.

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8. Select **Get Snapshot**.
   The table contains information on the alerts.

Analytics

View comparisons for performance of key metrics over time with the Impact Total package.

Compare Datasets (Release, Dates)

Compare and understand metrics for any two releases/patches to see the impact of changes

Top Transactions

Analyze and compare your top transactions for a specific instance during a selected date range.

Query Patterns

Visualize trends and overlay key metrics to see impact

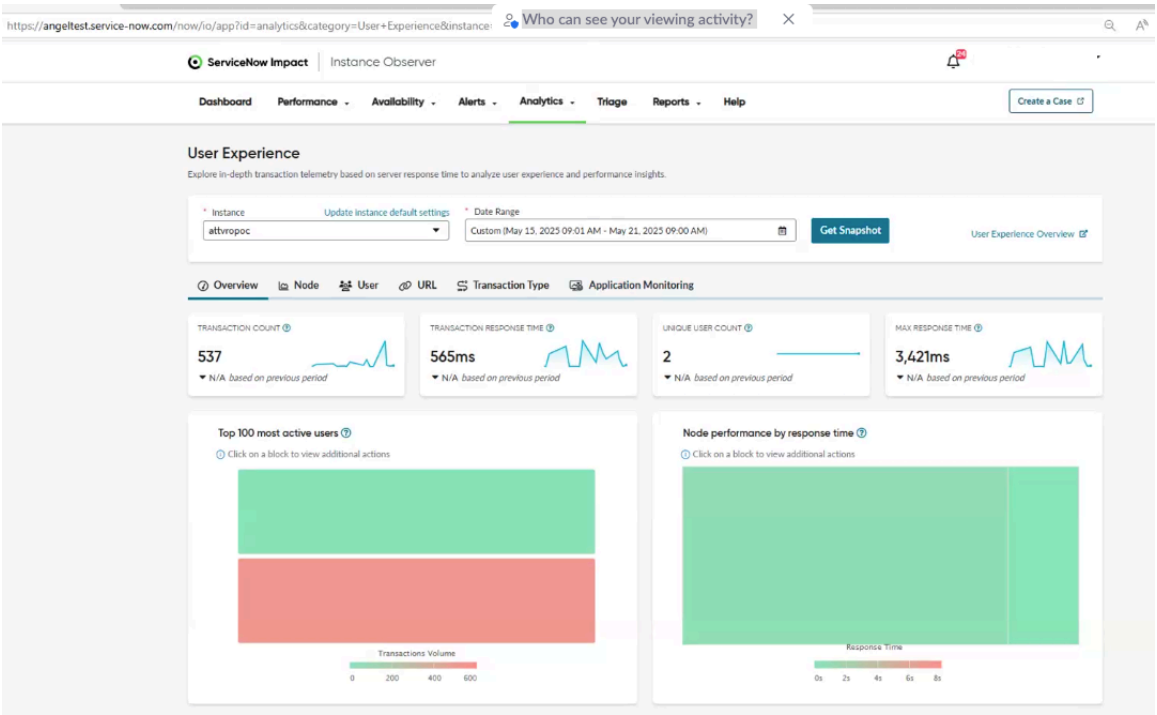
User Experience

Explore real-time user monitoring to analyze user experience and performance insights in Instance Observer telemetry into node, transaction type, URL, and user level breakdowns for Impact Total customers.

- Access the User Experience to visualize quickly your user base issues based on transaction type and volume, outage or service degradations, and access the specific affected URL for Impact Total customers.
- Search for a specific URL that is causing increases in transaction response time.
- Analyze node and transaction type level data for outliers and trending transactions.
- Identify which users are impacted by an outage or service degradation.
- Quickly visualize your user base based on transaction volume.
- Monitor your applications for performance issues and track the cause of performance issues.

The overview page breaks down user history and transaction count into various widgets and charts into a dashboard view.

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User Experience overview

Data type	Description
• Transaction count • Transaction response time • Unique user count • Max response time	Displays the current value, a percentage of decrease or increase in historical trend, and a visual graph of the activity.

Top 100 most active users	• Hover on a user block to see an encrypted user ID and the number of transaction reports for that time period.
	  ○ Green blocks represent users without a threshold warning
	  ○ Red blocks indicate a transaction volume that surpasses the general threshold.
	• Select a user block to view the details of the entry.
	
	Note: The user ID is anonymized. Administrators have the capability to opt-in to the collection of non-anonymized data.

Node performance by response time	• Hover on a tile to see the node name and the response time for that node.
	  ○ Green blocks represent nodes with average response times.
	  ○ Red blocks indicate increased response time outside of average parameters for the node.
	• Select a node block to view the details of the entry.

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User Experience overview (continued)

Data type	Description
Application performance by response time	Track applications that have performance issues by using the average response time metric. The metrics are: • Total transaction processing time • Total semaphore wait time • Total UI time (Average response time) • Network latency • Content download time For more information, see Track the response time of applications to monitor their performance.
Node transaction count	Select a point on the graph to view additional actions and drill into the transaction details.
Node response time	Select a point on the graph to view additional actions and drill into the transaction details.

Note: User Experience in Instance Observer may not be available to customers in the FedRAMP, NSC DOD IL5, or Australia IRAP-Protected datacenters, to self-hosted customers, or in other restricted environments, or to managed service providers.

Manage User Experience

Explore in-depth transactions for a user or a node for a given period.

Before you begin

Note: The functionality is enabled through the Impact Delivery Instance (IDI) portal where a customer admin reviews the Terms & Conditions and opts in via the Manage Permissions page.

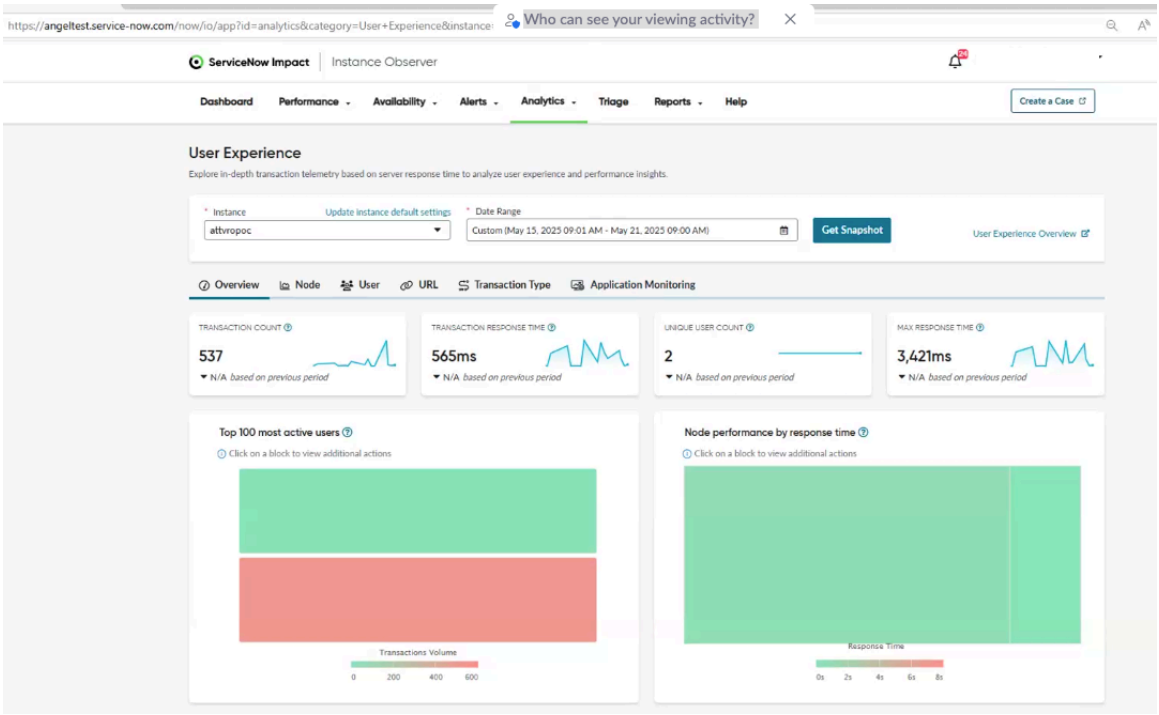
Role required: admin

Procedure

1. Navigate to **Impact** > **Platform Health** > **Monitor** > **Instance Observer** > **Analytics** > **User Experience**.
2. Select an instance and a date range from the filter options.
   Select **Update instance default settings** to configure default snapshot settings.
3. Select **Get Snapshot** to load the User Experience data charts.
   The following data analysis options are available:
   - Overview
   - Node
   - User
   - URL

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- Transaction Type
- Application Monitoring



4. Drill into each data point to open the particular details.
   For instance, select a user data point on the chart. The User transaction details open with various data points. Select each data point to drill further into each area.
5. Select the **URL** tab to access each specific URL transaction.
6. Select **Application Monitoring** tab to track applications that have performance issues. You can track the applications using five different metrics and analyze the cause of the performance issues.

   For more information, see

   - Track the response time of applications to monitor their performance.
   - Analyze user experience and monitor application performance in Instance Observer
   - .

Track the response time of applications to monitor their performance

Track the response time of applications to gauge their performance. You can drill down to the transaction ID of each application to learn the slowest and fastest interactions in each instance.

Before you begin

Role required: admin

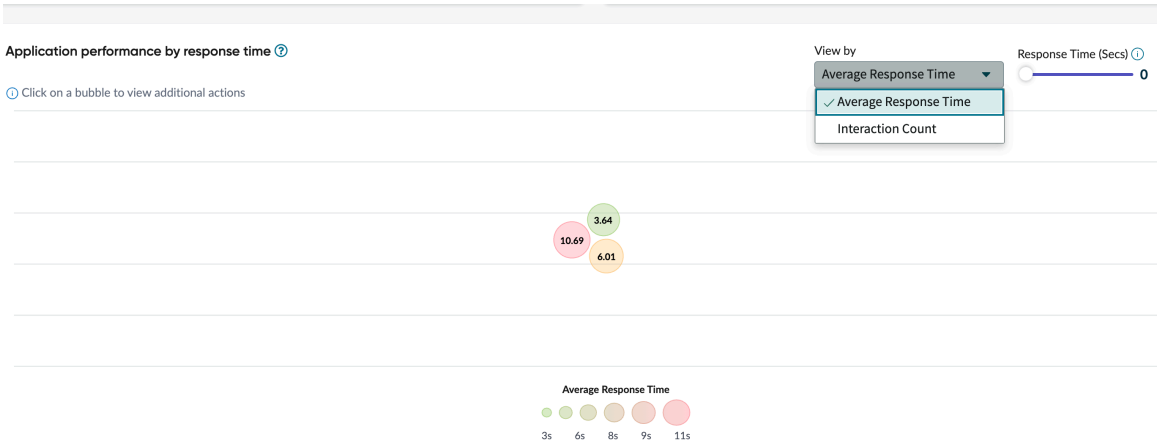
About this task

With application monitoring, you can view the number of applications in each instance, the number of pages in each application, and the response time behavior of each page. You can also learn the number of times a user is interacting with each application, and the number of times a user is opening a page in that application.

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Procedure

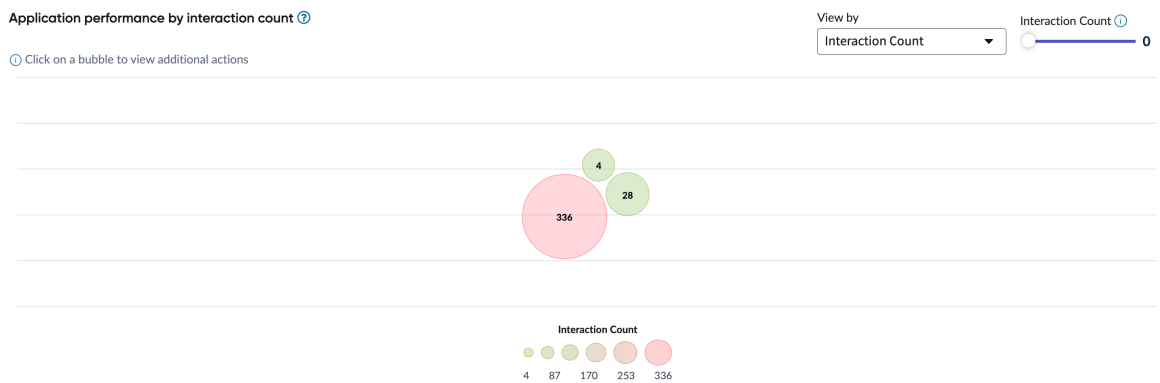
1. Navigate to **Impact** > **Platform Health** > **Monitor** > **Instance Observer** > **Analytics** > **User Experience**.
2. In the **Overview** tab of the User Experience page, select an instance from the **Instance** field.
3. Select a **Date Range** and click **Get Snapshot** to get the information related to the user experience with respect to the instance for the selected time frame.
4. Scroll down the page to view the applications in the form of a bubble chart.



The default view of the bubble chart is by Average Response Time. The application's performance is indicated by the color of the bubbles and they're color coded:

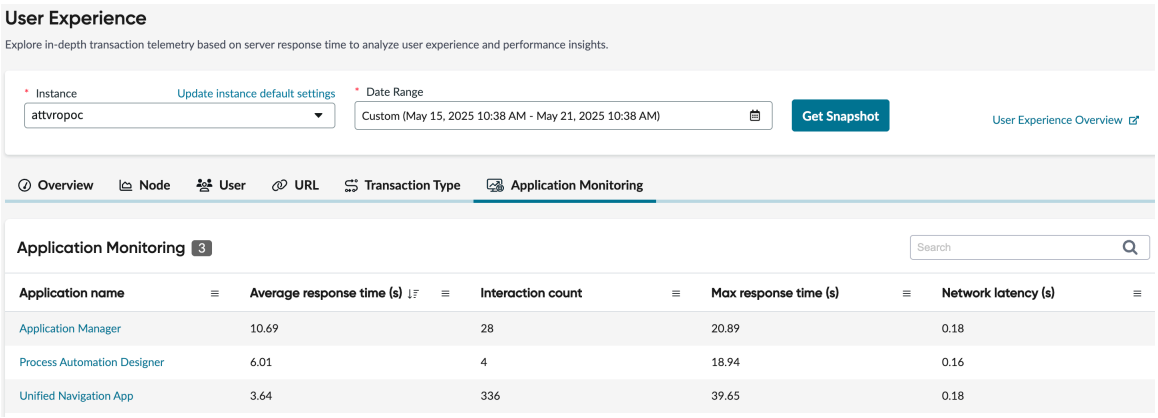
- Green: The response time of the application is 0–5 seconds, which indicates normal performance.
- Yellow: Response time is >5 but ≤10 seconds that indicates poor performance.
- Red: >10 seconds that categorizes the performance as worst.

5. To filter the number of applications that you would like to view based on the response time in seconds, slide the **Interaction Count** slider.
6. To view the data by **Interaction Count**, select the option in the **View by** list.



7. To view the user experience in the **Node** and **Transaction** charts, scroll down and select either **Transaction Count** or **Response Time** option in the **View by** list.
8. Select the **Application Monitoring** tab to view the same data represented by bubbles. The data that you view here is in a tabular format, listed by application names with their average response time, interaction count, maximum response time, and network latency.

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By default, the list of applications appear in descending order of the Average Response Time in seconds.

For more information on application monitoring, see Analyze user experience and monitor application performance in Instance Observer.

Analyze user experience and monitor application performance in Instance Observer

Get visibility into the operational metrics of applications and their performance. You can find out the number of applications per instance, the number of pages within each application, page-level response time, user interaction frequency with each application, and page access frequency by users within each application.

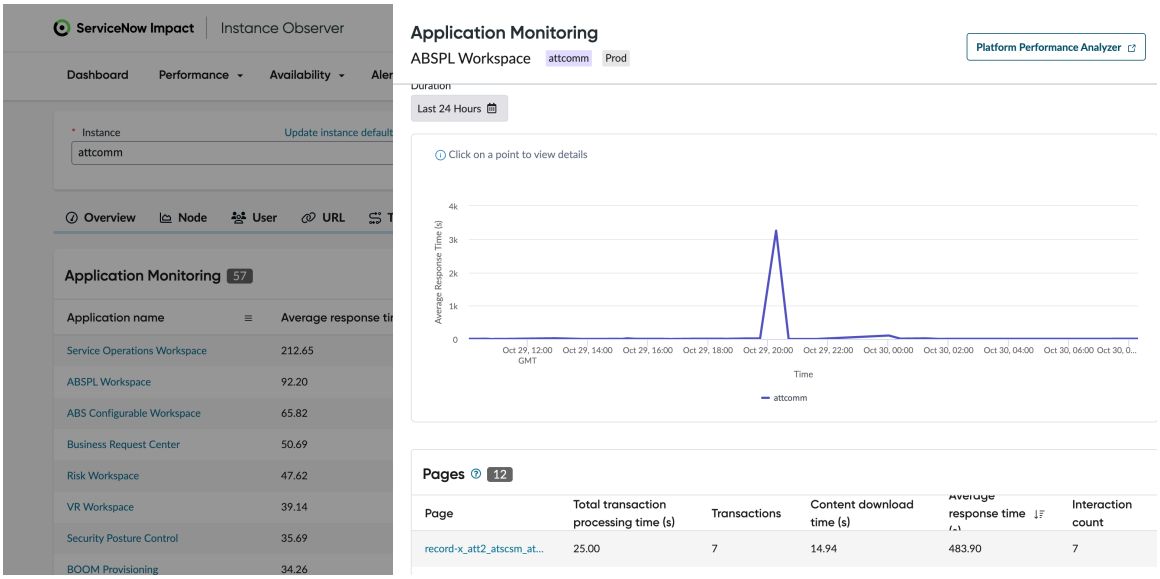
Before you begin

Role required: admin

Procedure

1. Navigate to **Impact** > **Platform Health** > **Monitor** > **Instance Observer** > **Analytics** > **User Experience**.
2. In the **Overview** tab of the User Experience page, select an instance from the **Instance** field.
3. Select a **Date Range** and click **Get Snapshot** to get the information related to the user experience with respect to the instance for the selected time frame.
4. Select the **Application Monitoring** tab.
5. Select any order to sort ( ) and change the representation as you would like it to appear in the table.
6. To search an application, enter the name of the application in the **Search** field.
7. Select an application in the list and click to view its details.
   A slider opens with the details of the selected application. You can view the average response time for the selected application for the selected duration.
8. Select any point in the graph to view the details for that particular duration.

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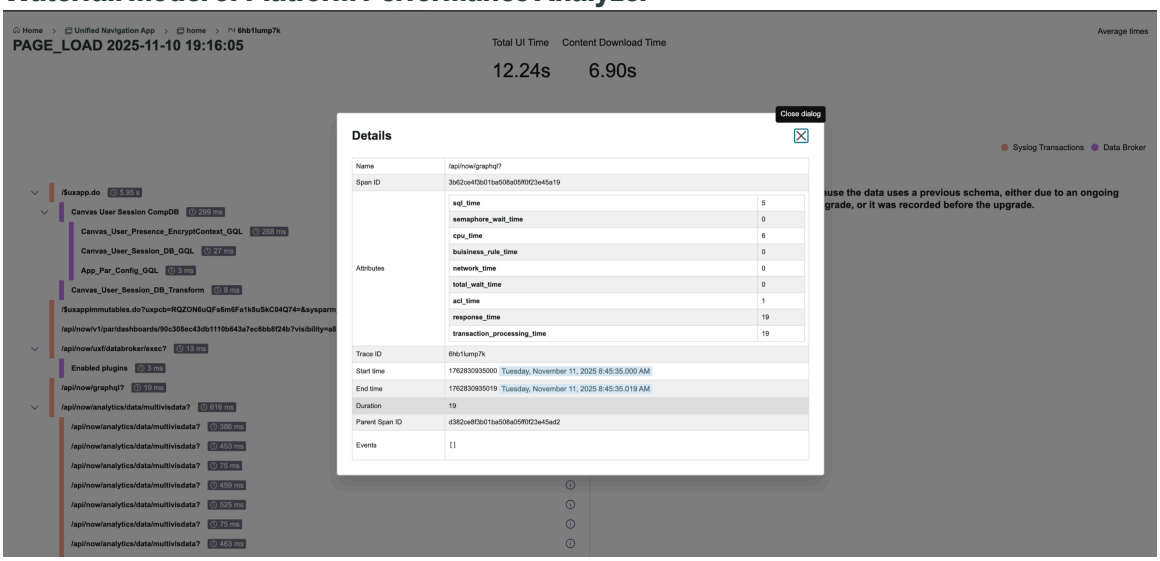


Selecting a point in the graph gives you the details of the maximum average response time.

9. Select the **Platform Performance Analyzer** button in the slider view to get the granular details of the server transactions from the customer instance.
   On selecting the **Platform Performance Analyzer** button, and followed by validation, the user is directed to the Performance Analyzer Page of the customer instance.

   The Platform Performance Analyzer provides comprehensive details about the user interactions linking with server transactions such as schema or API name in Graph QL, Batch, and Databroker. To resolve front-office application performance-related issues, this information is essential.

Waterfall model of Platform Performance Analyzer



10. Scroll down further to view the total number of pages for the application in the **Pages** section.
11. Select any link in the **Page** column to view the page-level details.
    In the page-level view, you can get the count of user interaction with the page for the selected duration and the average page response time. Additionally, you can comprehend the pages that require more time when there are contents to be downloaded in each of those pages.

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12. Select the **Slowest Interactions** tab and **Fastest Interactions** tab to view the Interaction ID, Transaction type, Response time, and the Total semaphore wait time.
    The response time in the **Pages** section isn't the same as average response time. Total semaphore wait time is the key performance metric. For more information on the performance metrics, see .
13. Select any link in the **Interaction ID** column to view the details of either the slowest or fastest instance details.

Triage a ServiceNow instance

Perform a triage on a ServiceNow instance to gather point-in-time telemetry data for troubleshooting using Instance Observer. The triage feature gives a summary of ongoing operations at the time of its execution.

Before you begin

Role required: admin

Procedure

1. Navigate to **Instance Observer** > **Triage**.
2. From the Instance Observer Dashboard page, select the **Triage** tab.
3. Select the **Instance** you want to triage.
4. If the instance is not listed, select the **Update instance default settings** link.
   In the Update instance management settings page, select that works as toggle on and off within the Instance Telemetry pages.

   Instrumentation or telemetry data is available for production and sub-production instances. Caution must be exercised in interpreting the content of the sub-production data with the awareness of any active customizations or other development activities that might be happening.

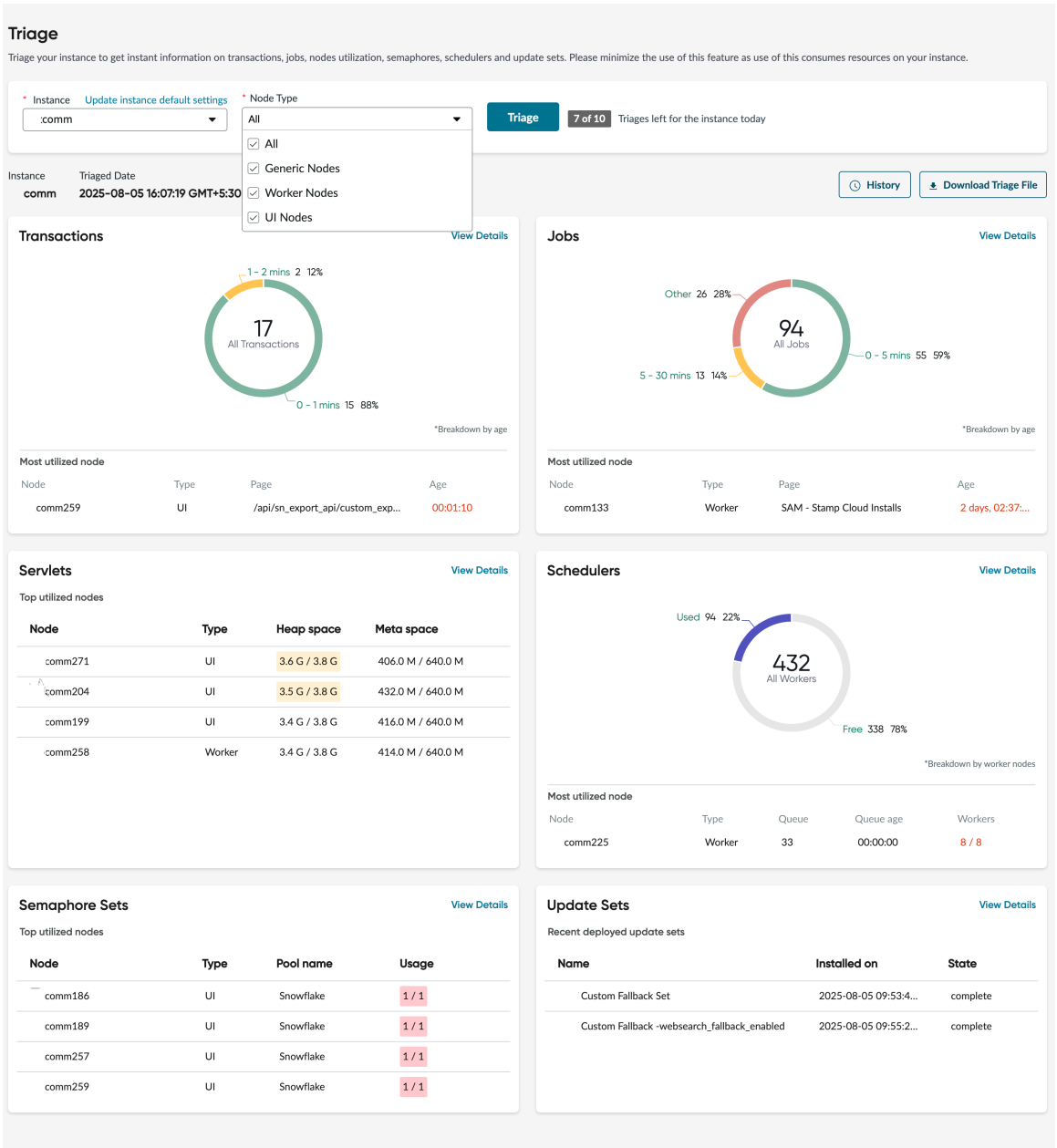
5. Select the **Node Type** to triage the instance.
   The production nodes are categorized as **All**, **Generic**, **Worker**, and **UI** nodes. You must select at least one node.
6. Select **Triage**.
   The triage feature gives a summary of ongoing operations at the time of its execution. The triaged data displays the **Triaged Date** and **Node Status**, which is primary always.

   The triaged data appears in the form of widgets in 6 sections such as **Transactions**, **Jobs**, **Servlets**, **Schedulers**, **Semaphore Sets**, **Update Sets**. The Node type appears in each of the sections as **Type**, except **Update Sets** as this operates at the instance level and not at the node level.

   Most of the charts display data broken down by age. Whereas, Schedulers chart breaks down the data by worker nodes.

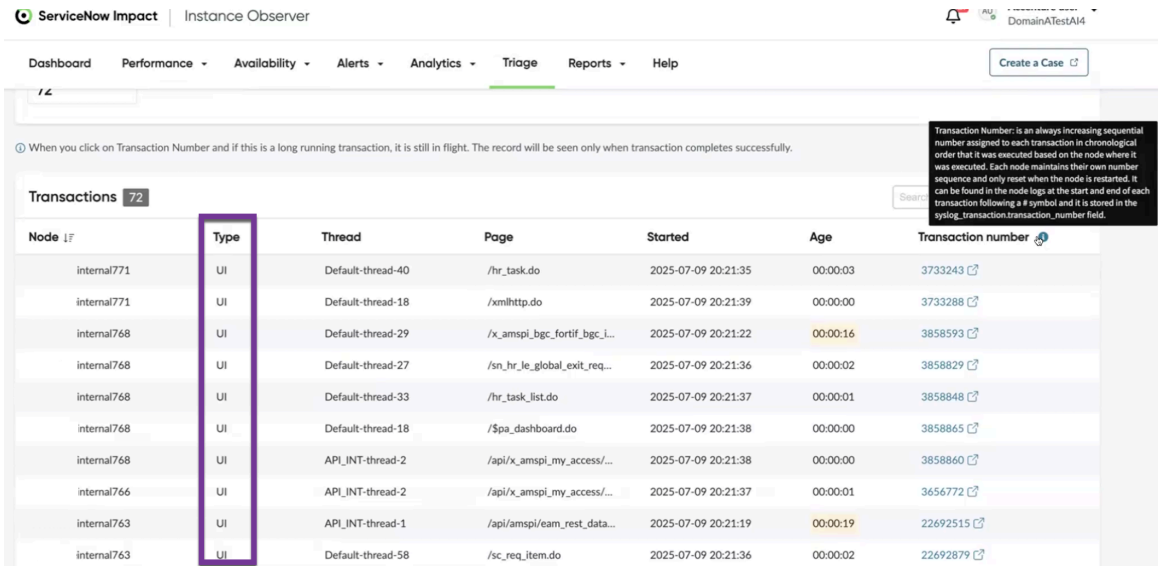
   To know more about each of the sections, see Triaged instance data.

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7. Select **View Details** in the Transactions section that takes you to the Transactions page to view its exclusive details.
   The **Triaged Date** and **Node Status** information is available here as well. The Type column gives you the node type information in the transactions section.

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You can filter ( ) the columns with conditions to view transactions that you want and sort ( ) each of the columns in ascending or descending order.

8. Select the Transaction number for a node to view the details.

   Note: You will be able to view the details only when the transaction is complete, and it may take awhile.

9. Select **Back to Triage** to navigate back to the Triage main page.
10. Select **View Details** in each section to view the respective details of **Jobs**, **Servlets**, **Schedulers**, and **Semaphore Sets**.
11. Select **History** to view the triage history in a slider view and click the **Created on** link that takes you to Triage History page.
12. Select **Download Triage File** to view all the sections of triaged details, downloaded in an excel format.

Triaged instance data

You can triage your instance to get instant information on transactions, jobs, nodes utilization, semaphores, schedulers and update sets. Minimal use of this feature is recommended as use of this consumes resources on your instance.

Note: Triage as a feature is for all markets and all tiers – Guided, Advanced, and Total.

Transactions

The transactions widget breaks down the transactions into their current execution duration. You can click **View Details** to get a comprehensive list of transactions. You can sort by age or search for a specific transaction. You can also access a particular transaction in the syslog transaction table by clicking the linked Transaction ID.

Jobs

The jobs widget breaks down the jobs into their current execution duration. You can click **View Details** for a comprehensive list of jobs. You can also sort by age or search for a specific job.

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Servlets

Use Servlets widget to learn more about your instance's nodes. The servlets widget displays information about the servlets currently serving the instance, including their names, start times, and the amount of heap and meta space they are using in comparison to what is available. This widget allows you to evaluate the distribution of activity among your nodes.

Schedulers

The schedulers widget allows you to gain insight into your schedulers by providing a detailed list that includes the number of jobs being executed, the number of worker nodes assigned to a node, the number of workers currently in use, the average age of the queue, and the total number of queues. Use this widget to identify the most heavily used nodes within your instance.

Semaphore Sets

The semaphore sets widget lists the utilization of various semaphores available on specific nodes within your instances at the time when triage was executed. You can click on hyperlinked node name to gain more insight to a specific node and the transactions in-flight during the time of triage.

Update Sets

The update sets widget lists all the updates that are applied in the past 24 hours and their completion state. Use this widget to gain insight of any updates that may be responsible to new features or performance changes within your instance.

Instance performance telemetry reports

Quickly generate reports to download and share with your business stakeholders, making #brganizations faster, smarter, and better in their#nstance performance management.

Visualize instance performance#telemetry over time and quickly generate reports to share with your team and business stakeholders.

Run a report on any instance to generate a downloadable summary on daily instance health, performance trend or database growth.

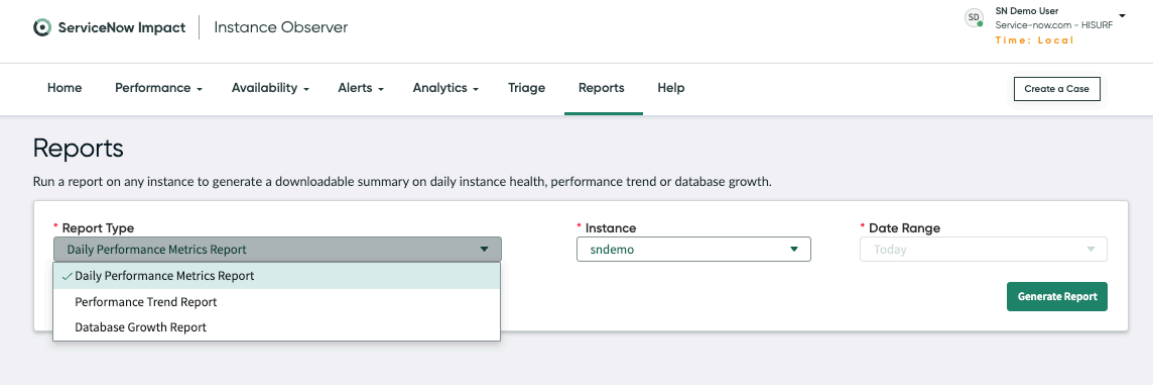
Report options

Tailor various reports specific to your business needs with a few steps.

Navigate to **Instance Observer** > **Reports**. Select the **Report Type**, the **Instance**, and the **Date Range** for the report.

Select **Generate report** and the report renders. On the report page, you have the option to download the report or to schedule the report to be run periodically.

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For additional information about a report, select **Help** > **Metrics** from the main menu and select the option from the right-hand menu.

Support matrix per Impact package

Some Instance Observer reporting features vary between the Impact package that you are subscribed to. Reference the support matrix for details.

- ✓ = Supported
- X = Not supported

Performance reports support matrix

	Guided	Advanced	Total
Daily Performance Metrics report	#	#	#
Performance Trend report	X	#	#
Database Growth report	#	#	#
Data retention	45 days	6 months	6 months
Self Service Alerts	X	#	#

Note: For more information on subscription support, see Impact packages.

Daily Performance Metrics Report

There are six daily performance metrics sub-reports that are available that show a current snapshot of the health of the instance.

Sub-report and description

Report	Description
ServiceNow Platform Health	• Reflects node availability, response, and lag times. • Compares availability and anomalies from today and the last 30 days. • Reports are based on the system thresholds that are set in the system and color codes the anomalies accordingly, with Green, Yellow, or Red.

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Sub-report and description (continued)

Report	Description
Health Indicator	• Displays number of slow transactions, queries, and long running jobs. • Compares the counts between today, yesterday, and the last 30 day average. • Reports are based on the system thresholds that are set in the system and color codes the counts accordingly, with Green, Yellow, or Red.
Top 10 Slow Transactions	• Finds the most executed transactions by total execution time and then takes the top 10 transactions that incur the highest average execution time. • Results list the instance page along with the average and total execution times, and the total count the page was executed.
Top 10 Slow Queries	• Finds the most executed queries by total execution time and then takes the top 10 queries that incur the highest average execution time. • Results list the query along with the average and total execution times, and the total count the query was executed.
Top 10 Long Running Jobs	• Finds jobs that are incurring highest duration in minutes. • Results list the job name, node, worker, and the duration.
Critical Support Cases	• Lists the total number of severity 1 and 2 support cases in the report header. • Provides case numbers as links, the area, priority, and state, along with tracking who opened the issue.

Performance Trend Report

Drill into additional detail on selected performance metrics.

The following report options are available in regards to system performance:

- Transaction/Report Times
- Database response
- Semaphore depth
- Event queues
- Jobs recurring and running
- Memory
- User session summaries

Custom Performance Report

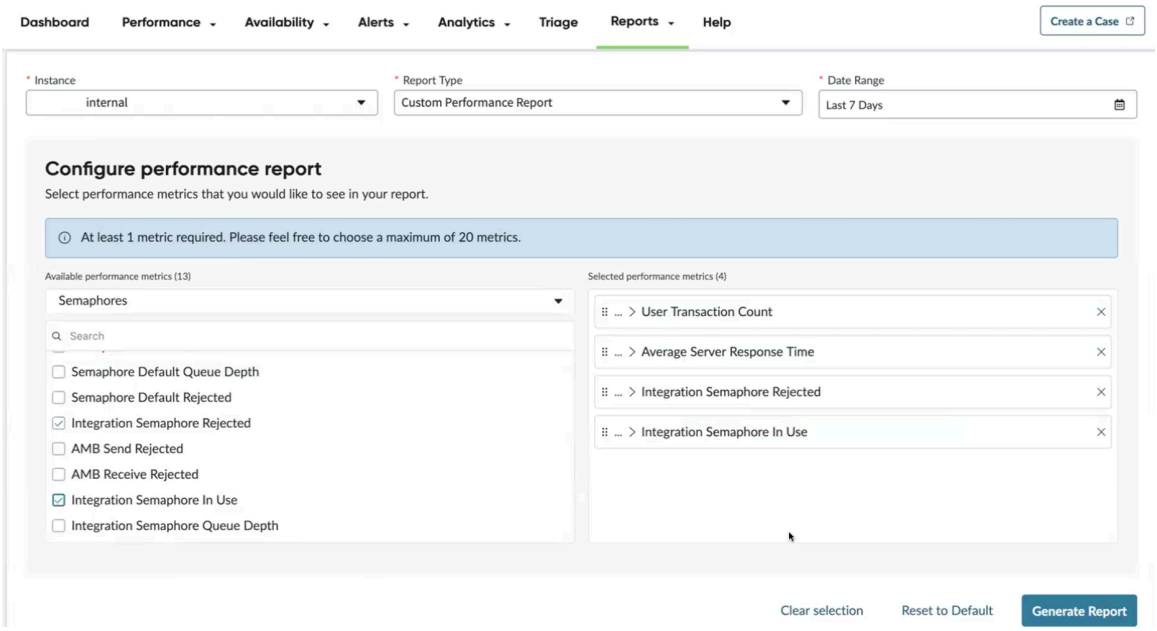
Generate Custom Performance report selecting a maximum of 20 metrics and a minimum of one metric from a wide range of 90 metrics available across the application. This report is almost the same as Performance Trend report, however offers you the flexibility to choose more metrics from the performance categories in the Performance page and build a dynamic report.

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To configure the Custom Performance Report:

1. Navigate to the Instance Observer Dashboard page.
2. Select the **Reports** tab and click **On Demand Reports** from the list.
3. Select the **Instance** for which you want to run the report.
4. From the list of report types, select **Custom Performance Report**.
5. Select the time frame for the report's duration in the **Date Range** field.
6. To add metrics from all the available metrics in the application, select **All**.
7. To add metrics from the categories available in the Performance page, select the specific category from the list.
8. Select **Clear selection** to remove any previous selected metric from the list.

   The selected metrics from the **Available performance metrics** column appear in the **Selected performance metrics** column on the right.
9. Select **Generate Report**.



Each metric render a different visualization, where many of them are based on time series rendering as charts, while some of them are tables where the key performance indicators are aggregated in a tabular format.

You have the flexibility to build the report in any order that you prefer. Once the report is ready, you can email it, set as CSV file, or generate a PDF.

Database Growth Report

There are several database growth reports that are available that show how the instance database has increased over a selected date range.

Note: Guided customers may select a range of up to 45 days.

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Database report and description

Report	Description
Primary Database	Various metrics on how the database has either grown or decreased over the selected time frame. Total DBI size based on the sum of all tables, calculated every 4 hours.
Database by Size (Including Shards)	Various metrics on how the database has either grown or decreased over the selected, including shards. Total DBI Size align with primary shards, this is calculated every 4 hours and can be used to visualize database growth over time.
Top 20 Tables (By Size)	Lists table name, size (GB), 1 day growth and rate, and the 7 day growth rate.

Help

Access release notes, how to videos, and more from the Instance Observer Help Center page.

There are four menu options in the Help Center:

- Video Tutorials: View videos to help understand your options available to you in Instance Observer.
- Metrics Overview: Provides information of the available metrics and reports that can be accessed along with helpful definitions.
- Release Notes: Contains information regarding each Instance Observer release.
- How to Docs: Access documentation directly related to Instance Observer functionality.

Roles installed with Instance Observer

Several types of components are installed with activation of the Impact plugin, including tables, user roles, and scheduled jobs that are used in Instance Observer.

Roles installed

Role title [name]	Description	Contains roles
IO Standard [io_standard]	• Grants full access to all the features such as performance dashboards, reports, alert triage, and availability insights within Instance Observer. • Allows users to fully utilize the platform's capabilities.	None
IO read only [io_readonly]	Grants limited read-only access to the Instance Observer. Allows users to view features such as configured and unconfigured alerts, rules, and integrations. However, users are restricted in performing actions that involve configuration changes. The restrictions include:	None

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Role title [name]	Description	Contains roles
	• Creating or editing alert rules • Managing integration • Scheduling reports	

Value management

The value management constitutes a continuous loop of the end-to-end process of managing the value lifecycle, inclusive of envisioning value, creating value, ongoing management, optimization, and validation of value realized with the Impact store app.

Objectives and outcomes

The value management lifecycle starts with the creation of the Objectives and outcomes, which captures your objectives, which are high-level goals tied to measurable outcomes that help illustrate value over time. Understand and measure the value you receive from the ServiceNow products in the same instance where your applications live. By default, this cycle is executed on a yearly basis, although deviations of this time frame are possible by exception.

- Decide which objectives you want to focus on and track your progress.
- See which outcomes, success metrics,and capabilities will best support your vision.
- Tell your transformation story with operational performance and value reports.
- Measure a selected business objective under the same product across multiple ServiceNow instances. Use the Instance option on the Objectives and Outcomes, and Outcomes Insights to filter objectives and outcomes by the ServiceNow instance.

Outcomes Insights

Performance recap includes a table displaying various success metrics.

Trends can easily be filtered and viewed to track objectives and outcomes.

- Incremental value: The value of the improvements realized during the year after implementing the ServiceNow platform.
- Overall value: The overall, comprehensive value that the ServiceNow platform has brought to your organization during the year.

Using Impact Value Management data collection apps

Impact Value Management data collection apps are a detailed overview of the Report configuration options and potential implementation recommendations for collecting the data required for your value blueprint, outcome performance report, and value reports that are part of the Impact program. See Set up Impact Value Management data collection apps for additional information on how to use the data collection apps to simplify and optimize the value metrics data collection process using Performance Analytics (PA).

The Impact Value Management data collection apps are available on the ServiceNow Impact Store Application. These apps are accessible directly on a your instance as part of the Impact package, eliminating the need for separate downloads from the store or individual content packs. By leveraging predefined data definitions within Performance Analytics (PA), customers can automatically collect essential data for Value Metrics. This streamlined approach enhances the accuracy and efficiency of data collection for value measurement, providing a seamless

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experience and improving both customer satisfaction and product evaluation in the Value management within Impact.

For more information on data collection toolkit, see Set up Impact Value Management data collection apps.

Value Reports

The Value report evaluates the impact of improvements in key success metrics over time and translates them into operational and monetary value. These metrics align with the target objectives and outcomes you have been working toward. If you are a guided or advanced customer, your squad will collaborate with you to validate results, confirm key assumptions and inputs, and quantify the realized value in financial terms.

For more information on value reports in Impact, see Value reports.

Value reports

Your impact squad can work with you to calculate the operational or monetized value you have realized with ServiceNow in a **Value Report.**

Value reports in Impact Delivery Instance

To access the value report in Impact Delivery Instance, navigate to**Impact** > **Value Management** > **Value reports**.

You may work with your squad to assess overall value realized with ServiceNow (comparing pre- and post-implementation performance) if you are able to provide pre-ServiceNow baseline information for the success metrics.

You may have already initiated ongoing data collection for these key success metrics through your Quarterly Review Cycle. If not, however, your Impact squad will work with you to provide an overview of data collection options to support this process of ongoing value management.

Note: An option for data collection is the Impact Value Journey data collection applications. These applications can be accessed through the ServiceNow Store.

Key Elements of value report	Description
Historical baseline	• The Impact squad will work with you to identify a historical baseline period that you would like to use for your value report. • If you would like to assess overall value of ServiceNow (pre vs. post Implementation) 12 months of historical data points from your legacy system should be gathered before decommissioning. • Otherwise, the impact squad will work with you to identify an appropriate period, typically a 12 month-window ending at least one year ago, to be able to compare recent results to a historical baseline.

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Key Elements of value report	Description
	• As part of the value realization assessment, the success squad delivers a value report to highlight the value you've realized compared to if you had not moved to the ServiceNow platform. • Baseline data is ideally collected for all success metrics that are linked to your objectives and outcomes.
Current actual results	• The value report is created based on recent performance of success metrics, typically covering the past 12 months. • The squad compares the success metrics from this period against the historical baseline to measure improvements.
Value reporting actuals	• To quantify these improvements financially, the Squad collaborates with you to validate key assumptions in the report. • Aligning on these assumptions ensures an accurate estimation of the value achieved.

Value Reports in Impact Store Application

To access the value report in Impact store application, navigate to **All** > **Impact** > **Value Management** > **Value reports**, and then select the **Consumption Report** menu item in the Impact workspace.

You can view the value reports published in Impact Delivery Instance under the value reports section of the Impact store. However, you cannot create or manage value reports in the impact store experience.

Manage Value Reports

You can create and manage a value report in Impact Delivery Instance. The created reports are also available in Impact store application.

Before you begin

Role required: admin

Procedure

1. Navigate to **Impact** > **Value Management** > **Value Reports**.
2. Select **Create value report**.
3. Select a **desired Instance/ account** and **Product**.

Value calculation for Impact Value Reports

You can use value calculation for measurable business impact and track value using metrics.

Value calculation translates operational performance into measurable business impact—typically in monetary terms. Each business objective is linked to specific outcomes tracked through defined metrics. These metrics include a baseline (reference), goal, and current quarterly values.

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Tracking your progress

Business objectives are your high-level business goals. To help measure your achievement toward that goal, each objective is connected to several measurable outcomes. The outcomes are in turn tied to metrics that record your progress from quarter to quarter.

Example: Measuring Progress toward Automation Goals

If your business objective is to increase automation within your technology service operations, one way to track progress is through a lagging indicator that reflects the impact of automation efforts. An effective outcome to measure is the reduction in incident volume handled by the service delivery team. The corresponding metric is the number of incidents closed over a defined period. As automation reduces the overall number of incidents, the service delivery team experiences a decrease in manual workload—freeing up time for higher-value tasks.

Operational performance

Each metric has a reference (baseline), a goal, and a current value:

Reference value

The actual recorded value of a specific metric during the reference (baseline) quarter.

Goal

The target improvement is set relative to the reference value.

Current

The most recent value of the metric for the current reporting quarter, indicating progress toward the goal.

Each quarter, the current metric value is compared against the reference (baseline) value. This comparison is used as an input in the calculation that determines the overall value impact. The calculation may also include additional inputs. You can collaborate with your squad to review and adjust these inputs as needed to confirm that they accurately reflect your operational context.

Example: Outcome of reducing incident volume worked and metric of number of incidents closed

Date	Number of incidents (per quarter)	Compare to reference value
Reference value	100,000	
Goal	80,000	20,000
Q1 2024	110000	(10000)
Q2 2024	90000	10000
Q3 2024	80000	20000
Q4 2024	75000	25000

Business value

Business value is focused on monetization of outcomes and success metrics in your Objectives and outcomes, and delivered via Value Report. Business value is available for Advanced and Total Impact customers only. Value Report has actuals, comparison, actual date range, and comparison date range.

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Actuals

Operational performance data for the metric within the selected date range.

Comparison

Operational performance data for the metric within the defined comparison date range.

Actual Date Range

The annual period (typically four quarters) chosen for calculating business value.

Comparison range

The annual period (typically four quarters) used to obtain baseline operational performance data for business value calculation.

At the end of the year (or your chosen reporting period), your Impact squad reviews the operational performance results. These performance metrics are used as inputs in the calculation, combined with other factors, to generate the corresponding dollar value impact. You can collaborate with your squad to adjust these input values to better reflect your current operational context.

Occasionally, a negative value may be reported if the current performance deviates unfavorably from the baseline. In such cases, your squad assists in interpreting the results and identifying actions to help you achieve your business objectives.

Gen AI based outcome summarization

View a concise summary of your operational outcomes in the Impact store application. This summary could include positive or negative outcomes trends, adoption of recommended applications, and consumption of related accelerators.

Before you begin

Note:

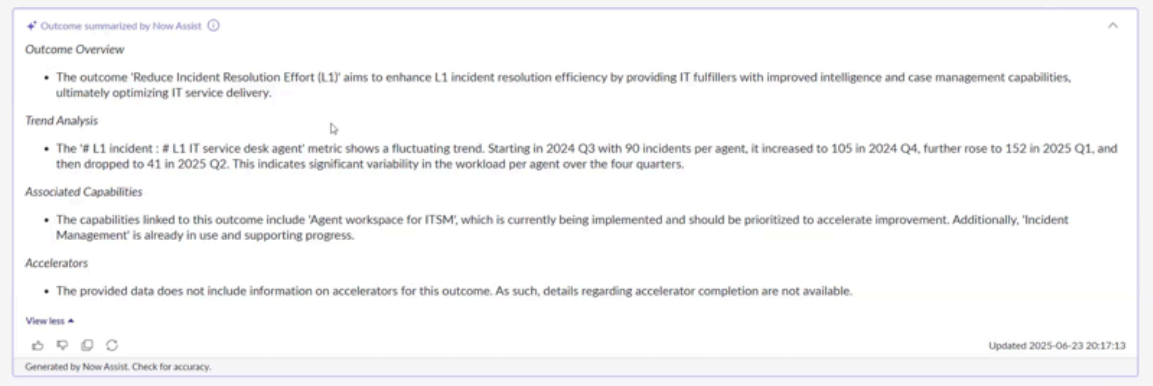
Access to the Outcomes summarization feature is determined by your Impact Package or a Pro Plus license for any ServiceNow product.

Role required:Impact App Admin, Impact Platform Owner, Impact Portfolio Owner.

Procedure

1. Navigate to **All** > **Impact** > **Value Management**.
2. Select the outcome insight.
3. In the Quick links section, select the **Outcome details page** link.
4. In the Summarize this Outcome section, select **Summarize**.
   Now Assist generates and displays summary information for the outcome, as shown in the following example.

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5. **Optional:** Provide feedback for the summary by selecting the thumbs-up or thumbs-down icons.
6. **Optional:** Copy the summary to use its information outside the app, for example, for including in an email or editing before forwarding, by selecting the Copy to clipboard icon.
7. **Optional:** If you think that data might have changed after you viewed the summary, refresh the summary information by selecting the redo icon.

Product Adoption

View your capabilities, product adoption roadmaps, and subscriptions for your ServiceNow instance.

Capabilities maps	Product Adoption Roadmaps	Subscriptions
View the full landscape of your licensed ServiceNow products and the status of their utilization.	View a recommended implementation sequence for your ServiceNow AI Platform capabilities.	View a list of all ServiceNow subscriptions and purchase amount you are entitled to.

Product Adoption Roadmaps

Product adoption roadmaps enable you to view a recommended implementation sequence for your capabilities. The implementation sequence is organized into specific phases for an optimal implementation.

PAR overview

The product adoption roadmap was initially only available to Impact Advanced, and Total customers. In the Yokohama release, the product adoption roadmap feature is also available to Impact-Guided customers.

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You can create a product adoption roadmap using pre-defined templates aligned to your business needs and products.

As an Advanced or Total customer, your Impact squad collaborates with you to determine the optimal implementation sequence tailored to your unique business needs. Before creating a PAR, a capability map should be published for that instance. See Capabilities maps for information on the capabilities maps. As soon as your Impact squad creates your PAR, you receive a notification.

While multiple users can view the Product Adoption Roadmap simultaneously, only one user can make edits at a time. When the roadmap is being edited, it is locked for others. When the product adoption roadmap is in locked status, you can see who is currently editing it and reach out to them to collaborate or request them to exit the roadmap.

You can Unlock a locked product adoption roadmap if you have an impact admin or platform owner role. When you unlock it, all changes to the current version are discarded, and the product adoption roadmap reverts to its last published version.

You can access your created roadmaps in by selecting **Product Adoption Roadmaps** from the **Product Adoption** menu on the Impact home page.

Use cases

You can explore your roadmap further and edit in the following ways:

- Select a capability card to view more details, including any adoption guidance.
- Add or remove phases.
- Manage capabilities for each phase.
- Connect capabilities to objectives.

Manage product adoption roadmaps for Impact Delivery Instance

Create a product Adoption Roadmap (PAR) with a single click by selecting the template that best supports your specific business outcome.

Before you begin

Role required: Impact admin, Platform Owner, Impact Portfolio Owner, and Impact Executive.

Procedure

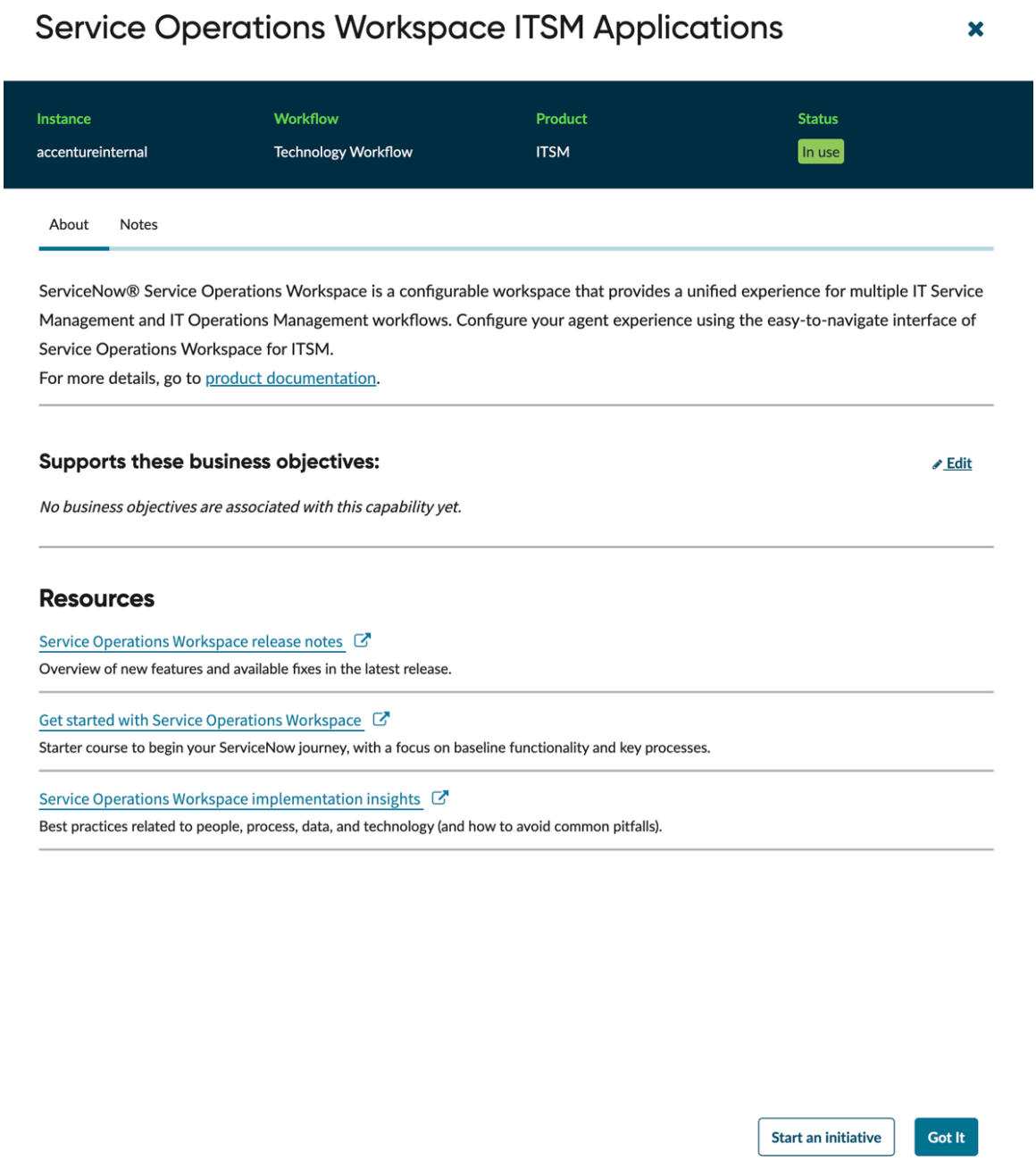
1. Navigate to **Impact** > **Product adoption** > **Product adoption roadmaps**.
2. Select **Create a product adoption roadmap**.
3. Select an instance if there are multiple instances available.
4. Enter the **Owner**.
5. In **How do you want to start?**, complete any of the following actions.

How do you want to start?	Actions
Create from a Template	**a.** Select **Create from a template** in **How do you want to start?**. **b.** Select a template in **Choose a template**.
Create a roadmap manually	Enter the **Name** and **Description**.

6. Select a capability to view it's details and to view or edit phase level notes.

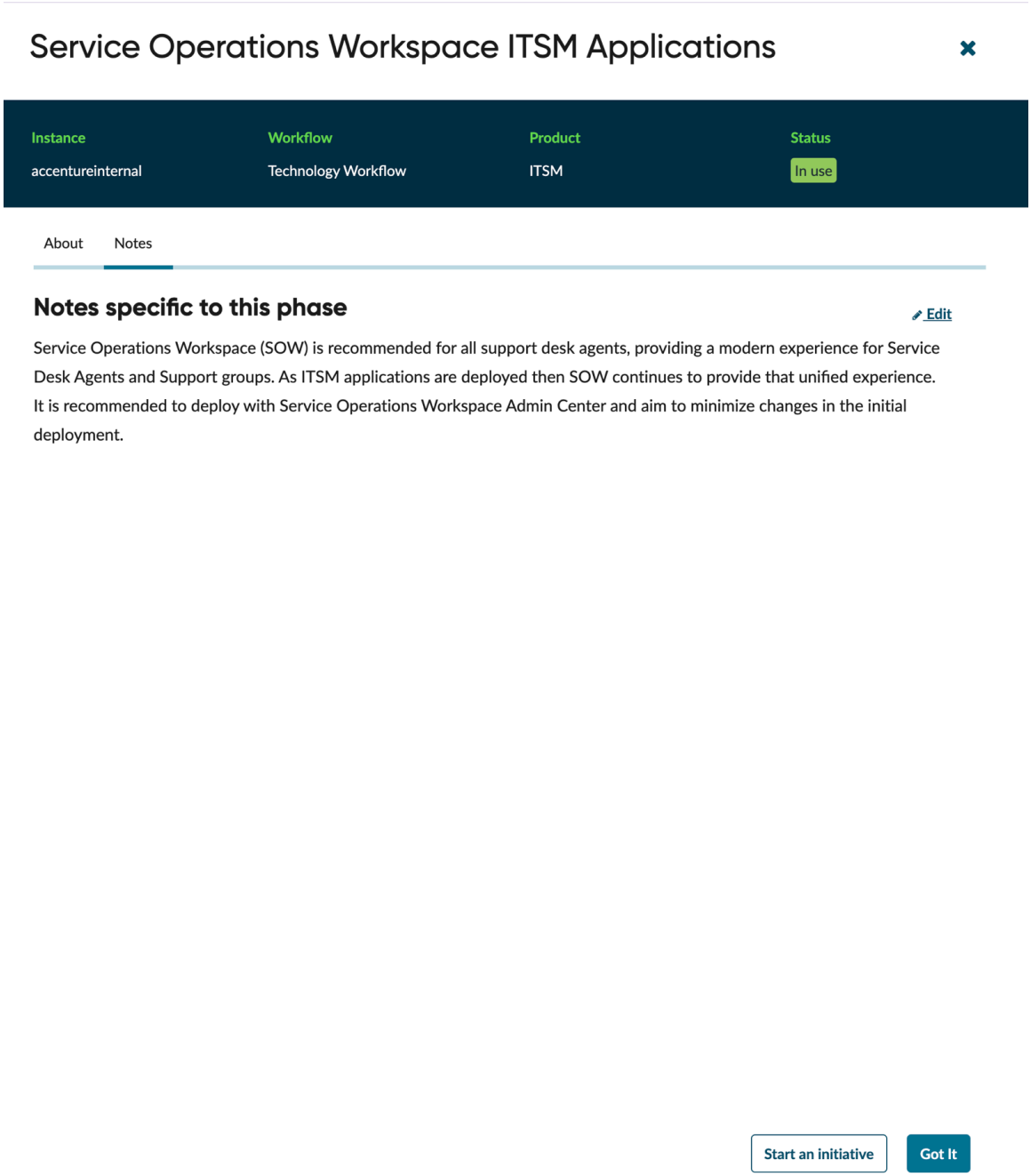
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a. Select **Notes** to view static and phase specific notes for a capability.
You can view static and phase-specific note sections under **Notes**. Static notes display for the selected capability regardless of the phase in which they are added.



b. Select **Notes specific to this phase** to display additional information tailored for the capability and phase including prerequisites, features, training, and planned activities.
You can find resources related to adopting the capability under **Related Resources**.

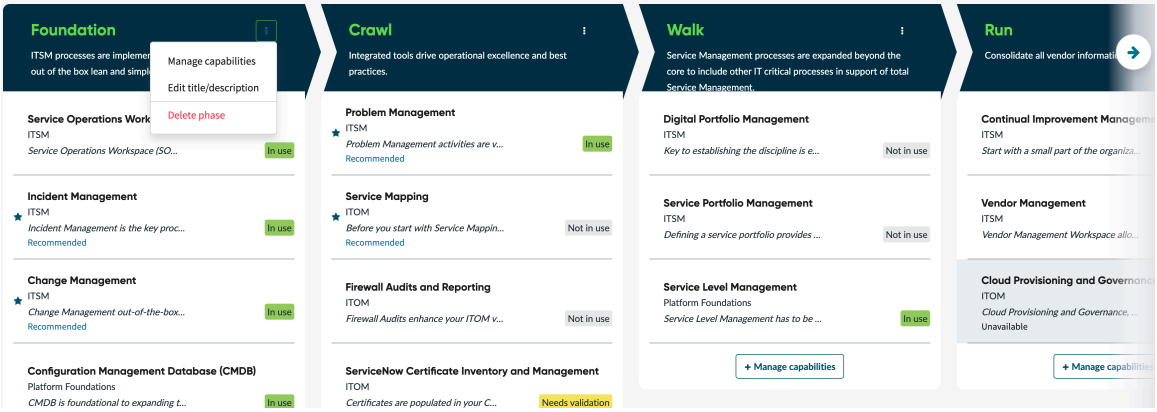
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c. Select **Start an initiative** to create an initiative specific to this capability.

7. Select **Edit Roadmap Details** to edit the name, description, and owner of the map.
8. Select **Manage capabilities** for a phase to add or remove capabilities.
9. Select the ellipsis icon for a phase to modify a phase and do the following.
   a. To delete a phase, select **Delete phase**.
   b. To edit phase titles and descriptions, select **Edit titles/descriptions**.

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10. Select **Publish**.
    The product adoption roadmap is published and is available to other members on your account and the impact squad.

What to do next

You can also edit the published roadmap by selecting **Edit roadmap** to manage the adoption phases and capabilities.

Manage product adoption roadmaps for the Impact Store Application

Create a product adoption roadmap (PAR) using either a predefined template or a custom roadmap.

Before you begin

- Evaluate the capabilities currently in **Planning**, **Implementing**, **In Use**, **Not in Use**, **No Intent to Use**, and **Needs Validation**.
- Add or remove capabilities as needed to align with business outcomes specific to your organization.
- View notes specific to a capability that span across phases.
- View notes for a capability specific to that phase to see pre-requisites, plan training, and evaluate additional implementation considerations.

Role required: Impact admin, Platform Owner, Impact Portfolio Owner, and Impact Executive.

Procedure

1. Navigate to **All** > **Impact** > **Product adoption**.
2. On the Impact Workspace, select **Product adoption** > **Product adoption roadmaps**.
3. Select **Create roadmap**.
4. On the Create new product adoption roadmap, page provide a name in the **Roadmap owner** field.
5. In the **How do you want to start?** section, indicate whether you want to create the roadmap from a template or manually.

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How do you want to start?	Actions
Create from a Template	**a.** Select **Create from a template**. **b.** Select a template in the **Choose a template** section. **Note:** You can access product adop tion roadmap templates with pre-de fined sequence of capabilities for ITSM, ITOM, Security Operations, Cus tomer Service Management, Risk and Field Service Management.
Create a roadmap manually	**a.** Enter a name for the template. **b.** (Optional) Enter a description.

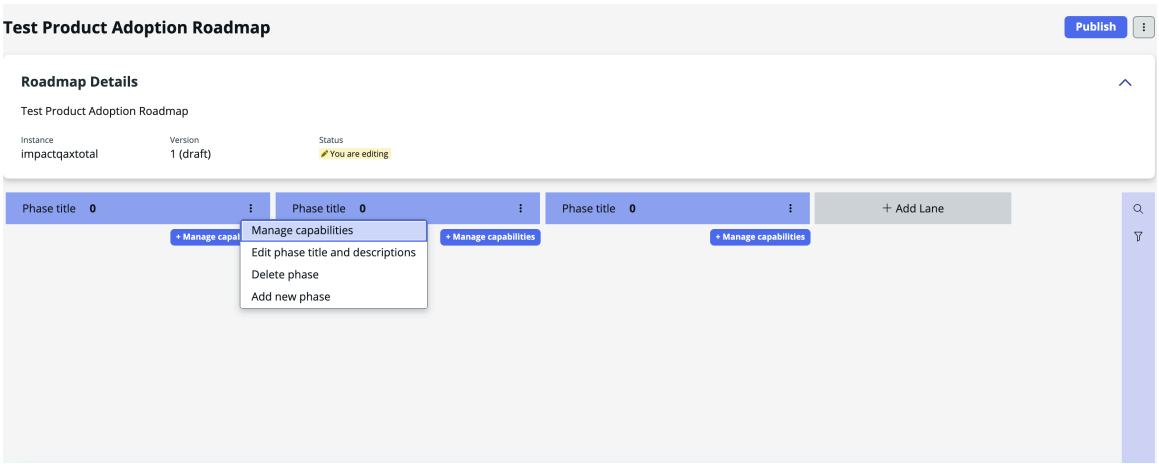
6. Select **Create**.
7. Select a capability to view its details page, and to view or edit phase level notes.



Select the **About** tab to view capability notes and phase specific notes for that capability. See Capability Details Page.

8. Select **Edit Roadmap Details** to edit the name, description and owner of the map.
9. Select **Manage capabilities** for a phase to add or remove capabilities.
10. Select the ellipsis icon for a phase to modify a phase and do the following.
    a. Select **Add new phase** to add a new phase to a capability.
    b. Select **Delete phase** to delete a phase.
    c. Select **Edit Phase titles and descriptions** to edit phase titles and descriptions.

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11. Select **Publish**.
    The product adoption roadmap is published and is available to other members on your account and the Impact squad.
12. Select **Edit** to edit a published roadmap to manage the adoption phases and capabilities.

Capabilities maps

See the applications, or capabilities, at your disposal for achieving your objectives.

Capabilities maps enable customers transparency and clarity into your ServiceNow platform with a comprehensive list of the products and capabilities that you have purchased. Descriptions of those capabilities are provided and can be drilled down to explore additional information about them.

You obtain separate capabilities maps for each instance, as when more than one instance is present, a capability map is generated for each one.

Note: If a stakeholder group has been enabled, the capabilities map only displays those instances that are associated with a stakeholder group. In case there's an instance that isn't displayed in the capabilities map, confirm it's associated with a stakeholder group. See Group Views for more information on stakeholder groups.

Capabilities maps are available in Impact Delivery Instance and Impact store from the **Product Adoption** menu. Capabilities maps provide a reference point into your entitled applications.

If you have more than one instance, select an instance from the drop-down selection menu. The summary information displayed references the selected instance.

On the capabilities maps, see the entire list of applications and a summary of the capabilities based on the filters that you select. When you change the filter options, the data displayed in the map updates accordingly.

The Capability details page displays information for a capability including description, relevant product adoption guidance, and it's alignment to objectives. You can use the **About** section to view detailed capability information to support informed decisions and **Related accelerators** to find relevant tools to help you implement and the capability. For more information, see Capability Details Page.

Manage capabilities maps in Impact Delivery Instance

Manage the usage status for capabilities and how they're being used in your instance. The information in the capabilities status fields feeds the capabilities maps summary bar.

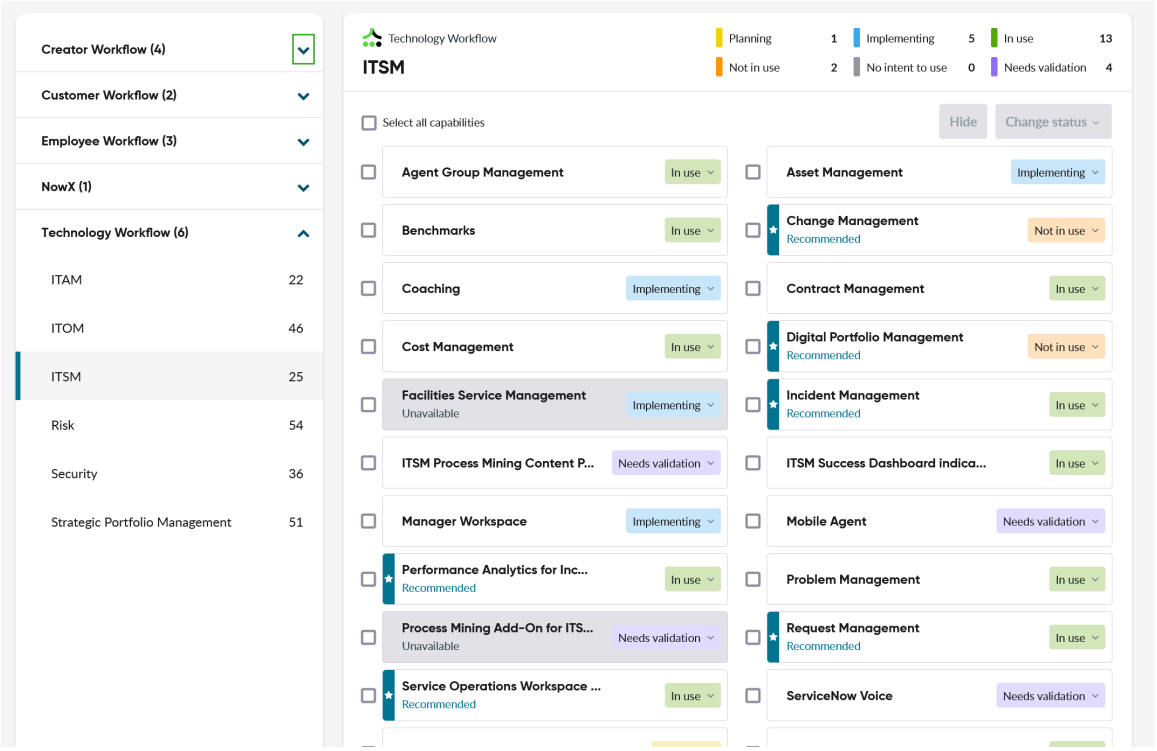
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Before you begin

Role required: Platform Owner, Impact Admin

Procedure

1. Navigate to **Impact** > **Product Adoption** > **Capabilities maps**.
2. Select an instance if there are multiple instances available.
3. Select a product from the available workflows in the left-hand navigation menu.
   All capabilities for the selected workflow and product are displayed in a table with color-coded status indicators.



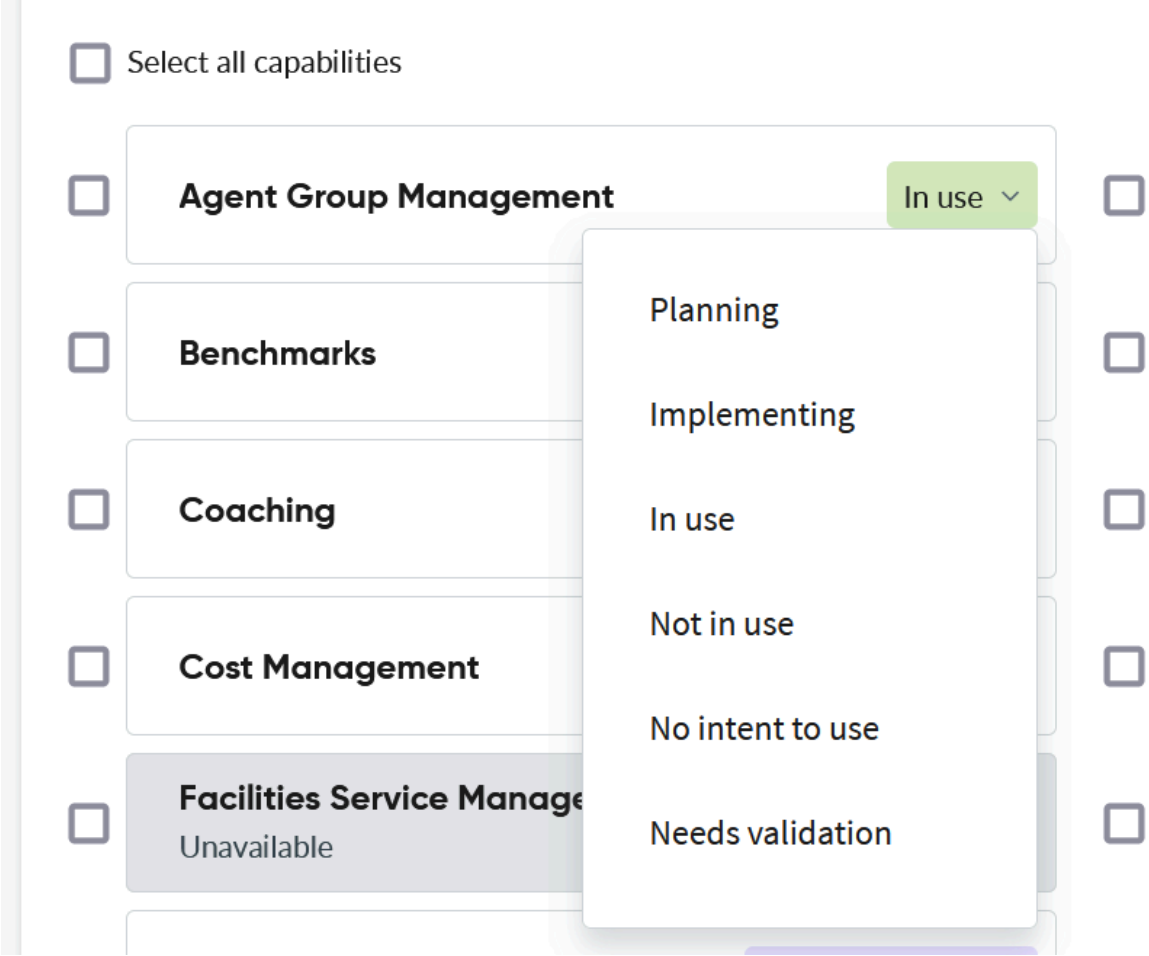
4. Update the status for one or more capabilities.

Capabilities maps statuses

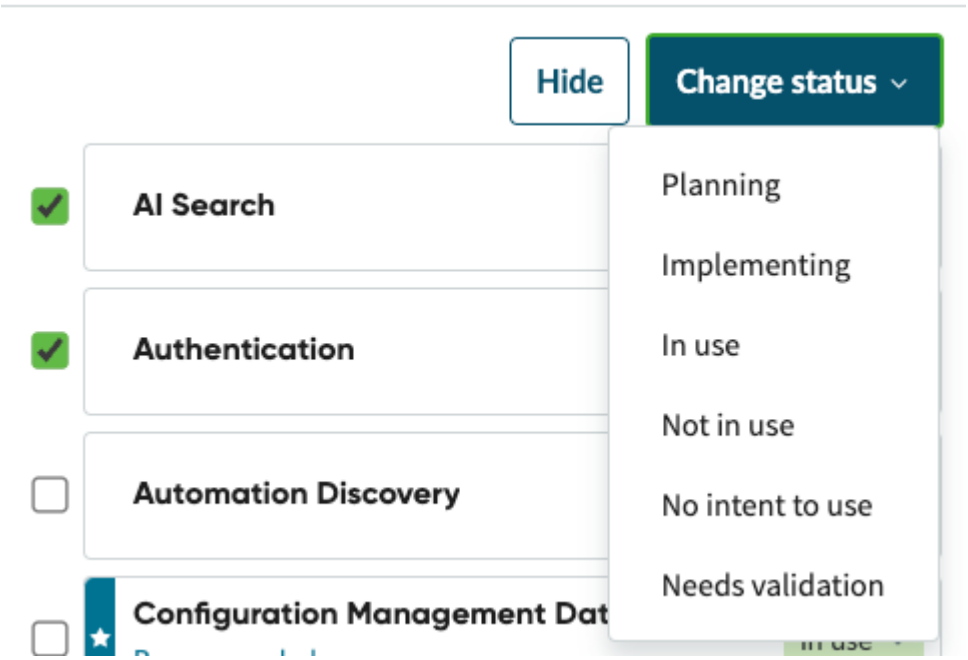
Status	Description
Planning	The application is under evaluation and plans for licensing and implementation are in progress.
Implementing	The application is licensed and is being implemented and configured for roll-out.
In use	The application has been fully implemented and is being utilized by the licensed users.
Not in use	The application is fully implemented and licensed, however, no users are currently utilizing the app.
No intent to use	The application will not be licensed or implemented.
Needs validation	The application is licensed but the implementation is incomplete. Further assistance is required in order to roll-out to the teams.

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a. Update a single status: Select a status from the color-coded status indicator on the application tile and select a status from the drop-down.



b. Bulk update: Select the check box for multiple capabilities, then select a status from the **Change Status** button.



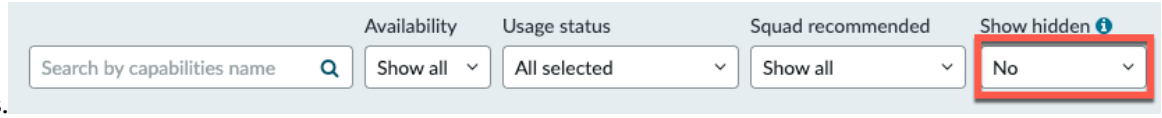
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The status automatically refreshes for the selected capabilities.

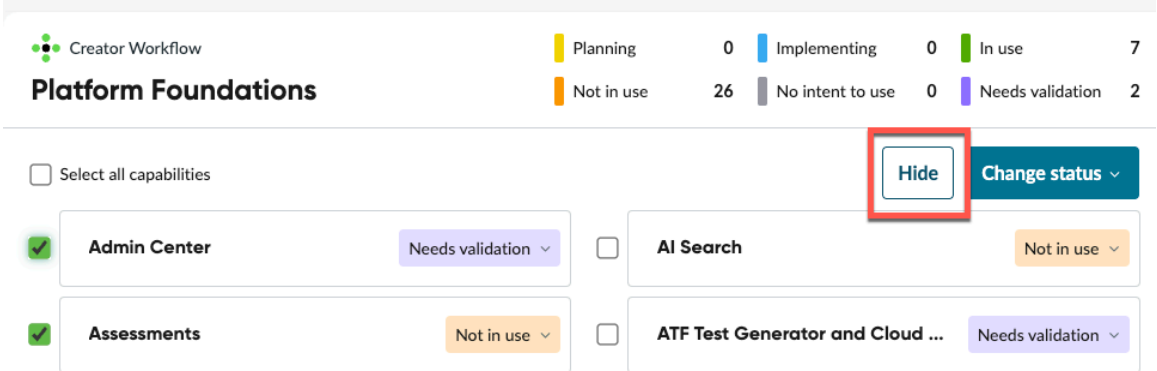
c. Update all: Select the check box for **Select all capabilities**, then select a status from the **Change Status** button.

Hide and Unhide capabilities.

5. **Optional:** Hide a capability from the capabilities map in an instance. When you set the capabilities map **Show hidden** filter to **No**, hidden applications are not visible in the list of applications.

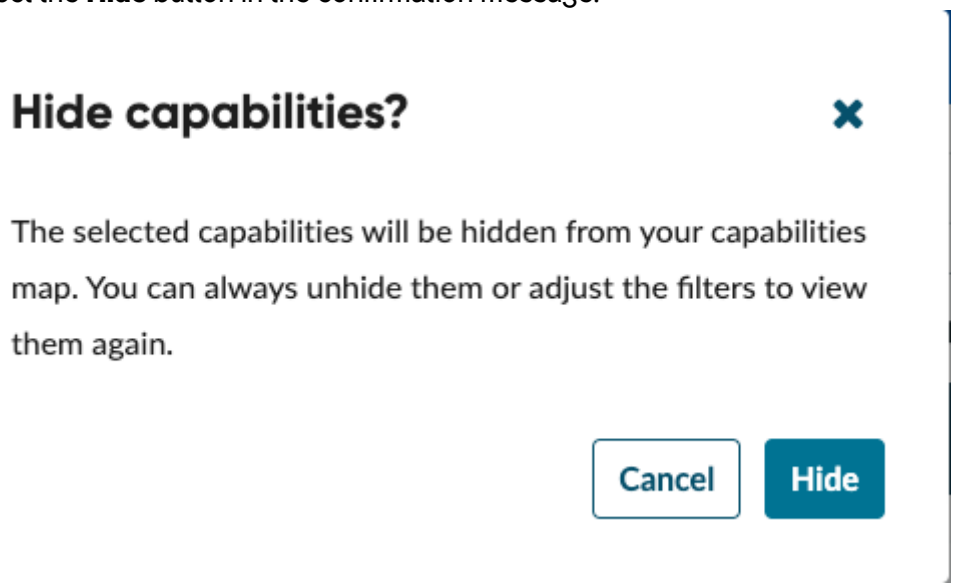


a. Hide a single capability: Select the check box next to the capability, then select the **Hide** button.



b. Bulk hide: Select the check box for multiple capabilities, then select the **Hide** button.

6. Select the **Hide** button in the confirmation message.

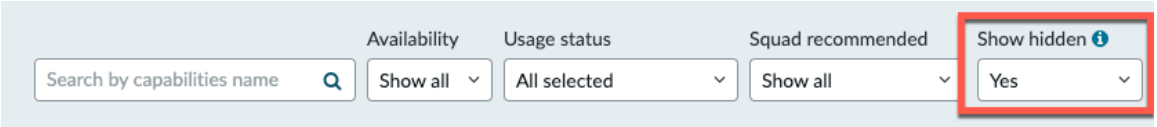


Selected applications will not display when the capabilities map **Show hidden** filter is set to **No**.

7. **Optional:** Unhide capabilities so they display in the capabilities map when the **Show hidden** filter is set to **No**.

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a. Set the **Show hidden** capabilities filter to **Yes**.



The hidden capabilities tiles are displayed in the list of applications.

b. Unhide a single capability: Select the check box next to the capability, then select the **Unhide** button.

c. Bulk Unhide: Select the check box for multiple capabilities, then select the **Unhide** button. The previously hidden applications display in the capabilities map. When you set the capabilities map **Show hidden** filter to **No**, these applications will be visible in the list of applications.

Manage Capabilities Maps for the Impact Store Application

Explore and manage the usage status for the capabilities you are entitled to use.

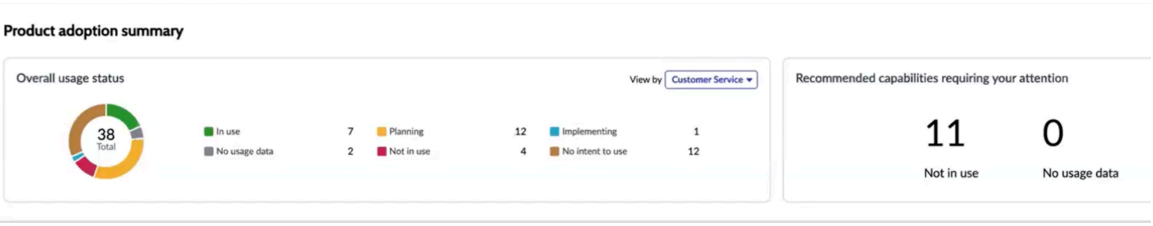
Before you begin

Role required: Impact Platform Owners, Impact Admins, Impact Executives, and Impact Users

About this task

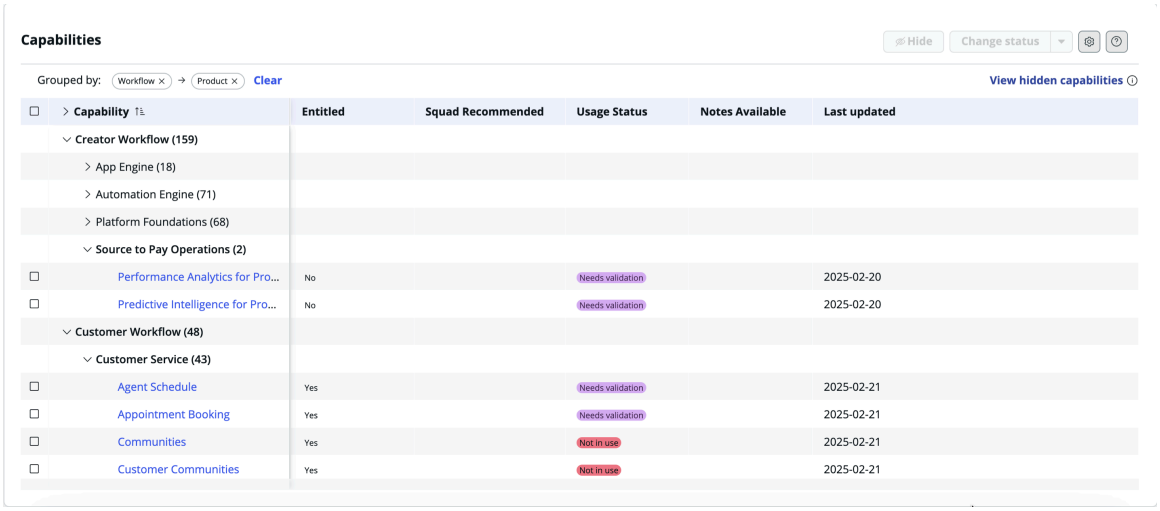
Procedure

1. Navigate to **Impact Workspace** > **Product Adoption** > **Capabilities map**.
2. In the **Product adoption summary** section, view the overall usage summary for capabilities under your specific product area.
3. To filter results specific to your product, select your product from the **View by** list. The Product Adoption Summary provides a clear overview of the capabilities your organization is currently planning or actively using. It also highlights a list of recommended capabilities that include squad recommended capabilities and ServiceNow locked list of recommended standard capabilities.



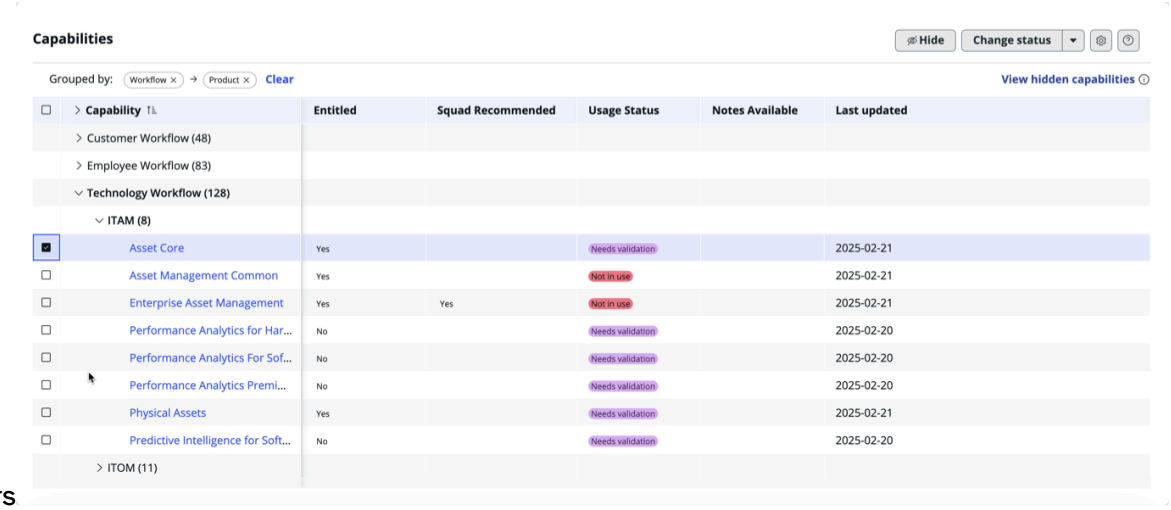
4. In the **Capabilities** section, you can expand the workflows and products to view the capabilities and their details such as usage status, entitled, related accelerators, available notes, and last updated date.

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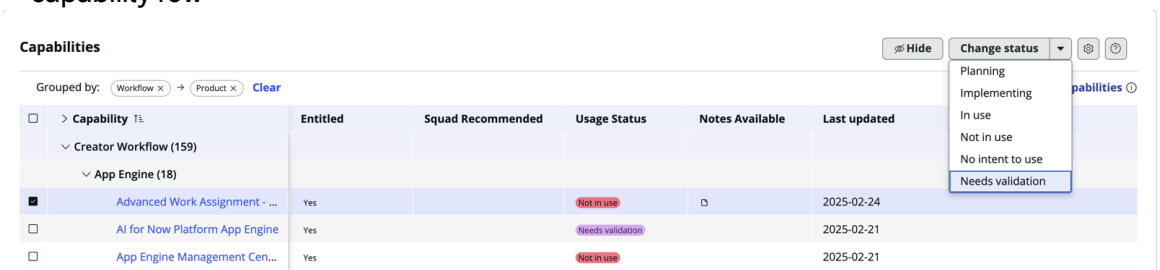


Note: In the **Capabilities** section header, you can view the details of the user who last updated the capabilities map along with the timestamp.

5. Navigate the workflows and select a product.
   All capabilities for the selected workflow and product are displayed in a table with color-coded status indicators

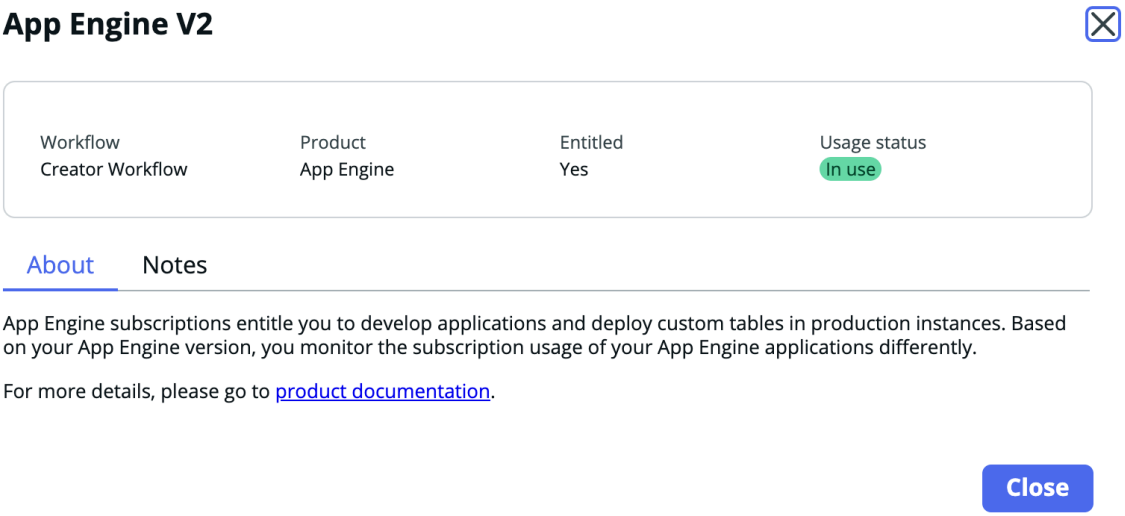


6. Update the capabilities by selecting a capability from the list of capabilities and then select a status from the **Change Status** menu.
   - Select a capability from the list of capabilities and then select a status from the **Change Status** menu.
   - Select the **Usage Status** by double-clicking the usage status column of the selected capability row

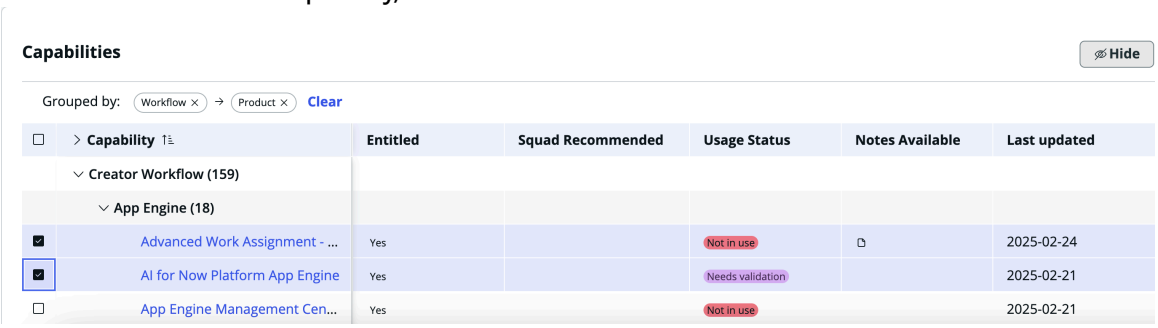


7. Select a capability to display the Capability Details Page **About** tab with the **Related Resources**.

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8. To hide the capability from appearing in the default view of the capabilities map, select the check box beside the capability, then select **Hide** button.



You can bulk hide capabilities by selecting the check box for multiple capabilities, then select the **Hide** button.

9. To view the hidden capabilities, select the **View Hidden Capabilities** link.
The default view of the capabilities map displays the hidden capabilities.To restore one or more hidden capabilities, select the check box beside the capability, then select **Hide** button.

10. To edit capability notes, select the capability to open its details window, then select **Edit** next to the **Capability notes** section under the **About** tab.

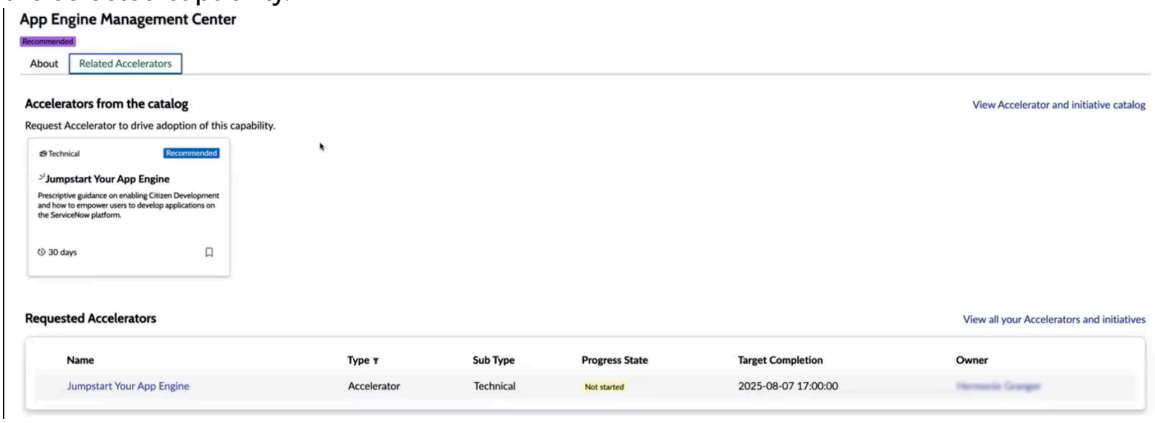


Note: If there are no capability notes, select **Add** to add them.

11. To add a new capability manually, select the **Add manual capability** button and enter the required information in the **Add manual capability** window.

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12. To view the capabilities that have related accelerators, view the related accelerator column for the selected capability.



Capability Details Page

View the various details for a capability using the Capability details page.

Capability details	Description
About	
Workflow	View the workflow for the selected capability.
Product	View the product for the selected capability.
Entitled	View if the selected capability is entitled to a subscription.
Usage Status	View the current usage status of the selected capability. **Note:** You can edit the Usage status for the selected capability by selecting the edit icon.
About this capability	View a Now Assist generated summary of description, features, benefits, and related resources when you click on a capability.
Capability Notes	View and edit additional information specific to a capability. You can view these notes by either selecting the capability from the capabilities map or a product adoption roadmap.
Included with these subscriptions	View which subscriptions provide entitlement to an entitled capability.
Guidelines for phase (Phase name)	View and edit notes specific to the phase for adoption guidance related to the capability that helps to ensure a smooth and effective product adoption. Some examples include prerequisites, dependencies, preparation materials, training, or any other adoption guidance fromServiceNow. **Note:** This section is only available when the capability is selected from the product adoption roadmap.
Support these business objectives	View and edit the business objectives related to a capability. Select **Add business objective** to add or remove business objectives for the selected capability.

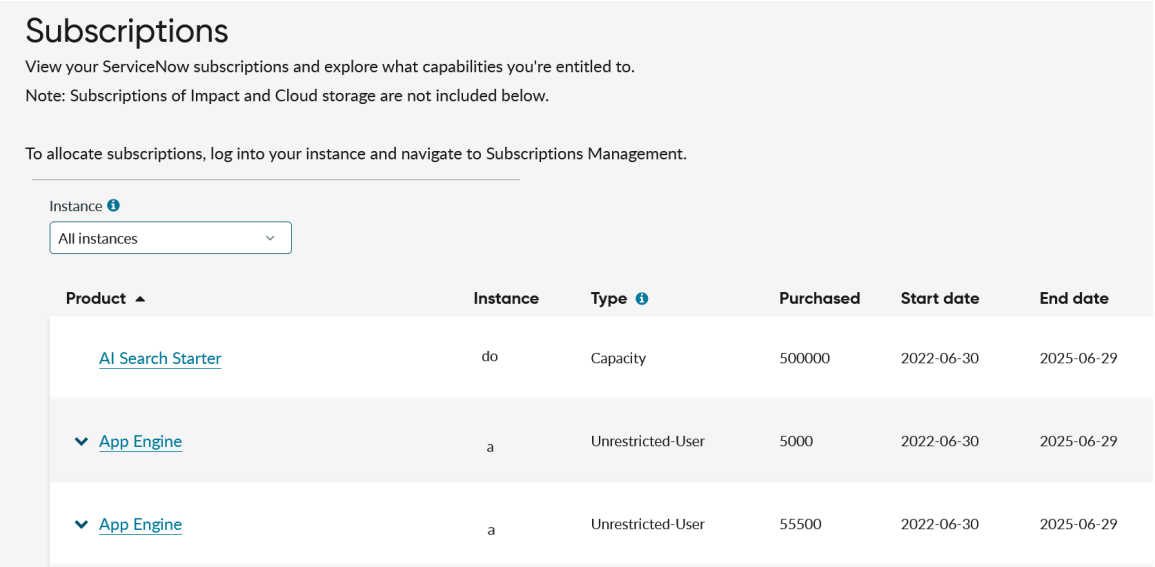
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Capability details	Description
Accelerators from the catalog	View the accelerators currently associated with the selected capability. Select an accelerator to view details for the accelerator including activities and time estimates. Select **View accelerator and initiative** catalog to view your list of accelerators and initiatives. From accelerator details, you can select **Request accelerator** to initiate the accelerator.
Requested Accelerators	View all the previously requested accelerators for the selected capability.

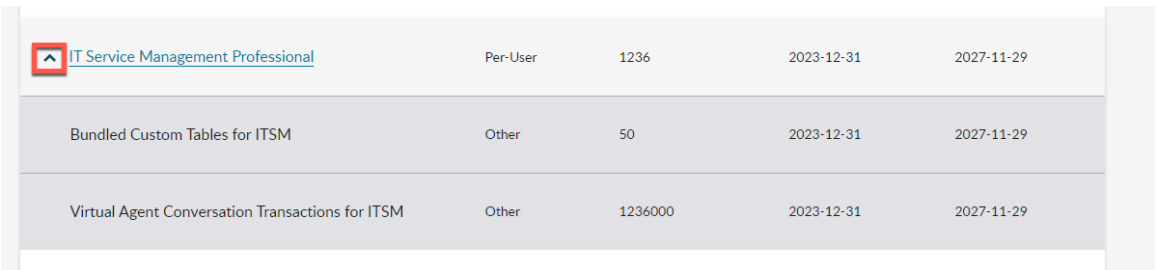
Subscriptions

See a list of your subscriptions for all of your instances and the list of applications that you're entitled to, as part of those subscriptions, in one comprehensive view.

Subscriptions display a list of all ServiceNow subscriptions and the amount purchased that your organization is entitled to.

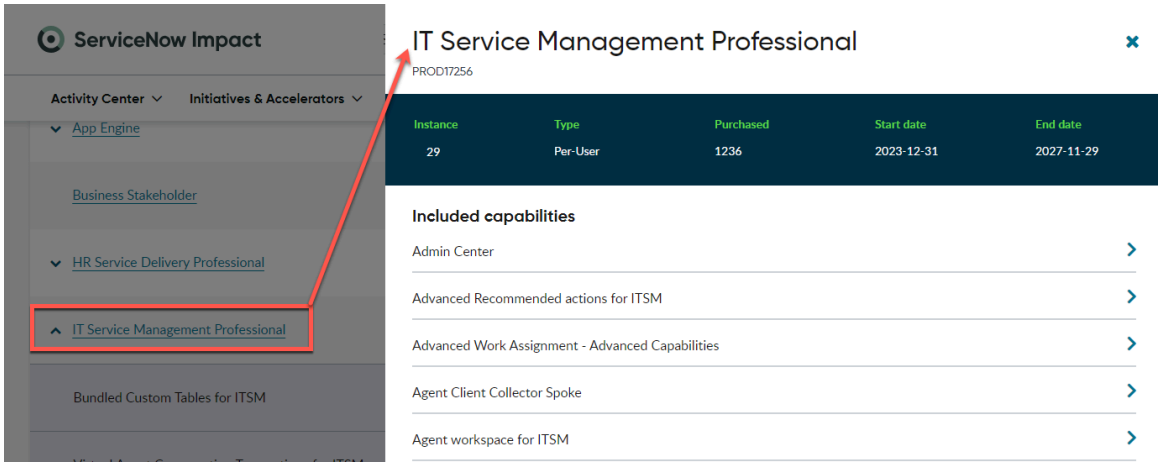


- For each instance, sort the list by alphabetical order, type of subscription meter, by the total amount purchased, or by subscription start and end date.
- If there are secondary meters, a chevron is available to the left of the subscription that can be selected to display those meters.

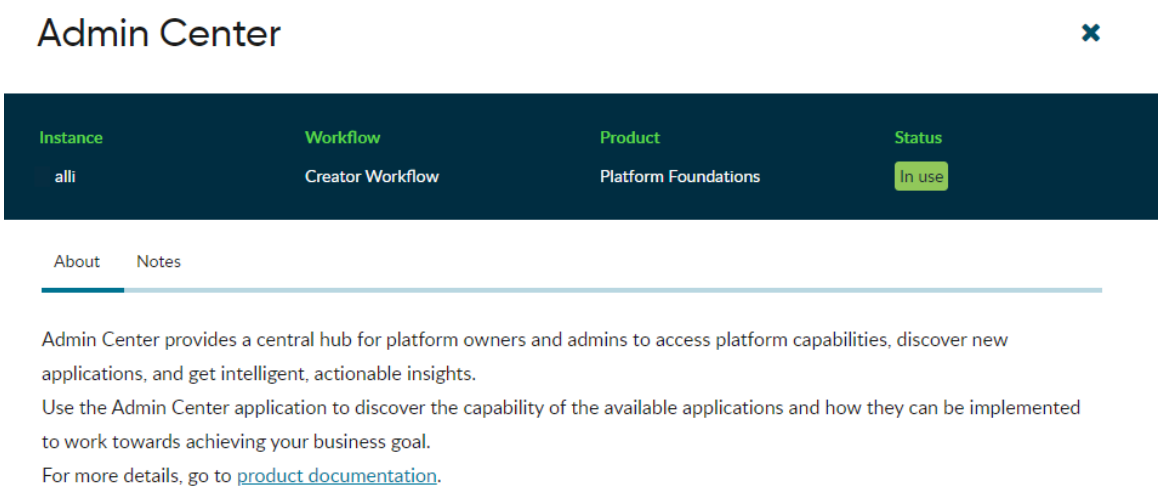


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- Select each subscription to see the capabilities that are included in the subscription bundle.



- Select each application to access the description.



Note: To allocate subscriptions, log in to your instance and navigate to **Subscription Management**.

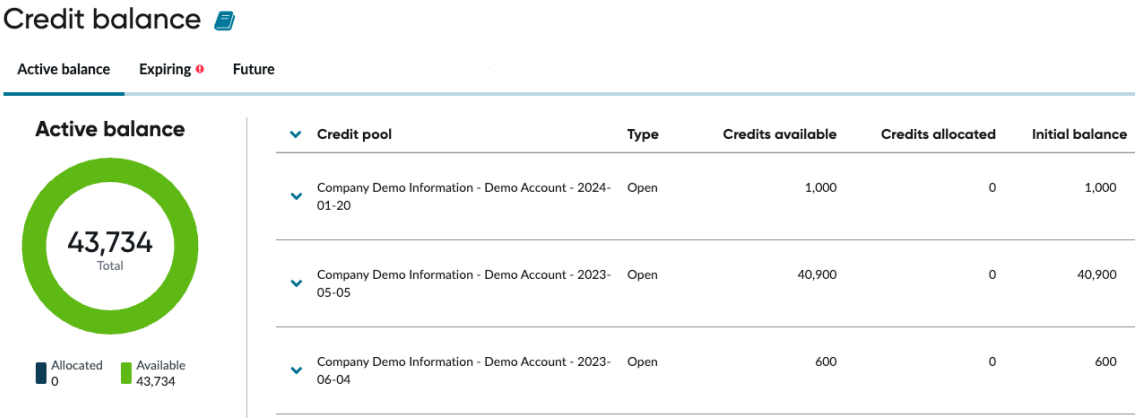
Training Insights

Impact Training Insights provide a comprehensive view of organizational learning activities, with real-time data available whenever and wherever it's needed.

The Impact Learning Dashboard demonstrates the usage and consumption of resources of on-demand courses, with an emphasis on the significance of education and its benefits. Appreciate the value of your learning credits and how they can be utilized. Additional insight into custom training and instructor-led technical courses includes:

- Learning Credit Consumption:
  - Active and credits available
  - Allocated and future credits
  - Expiring credits

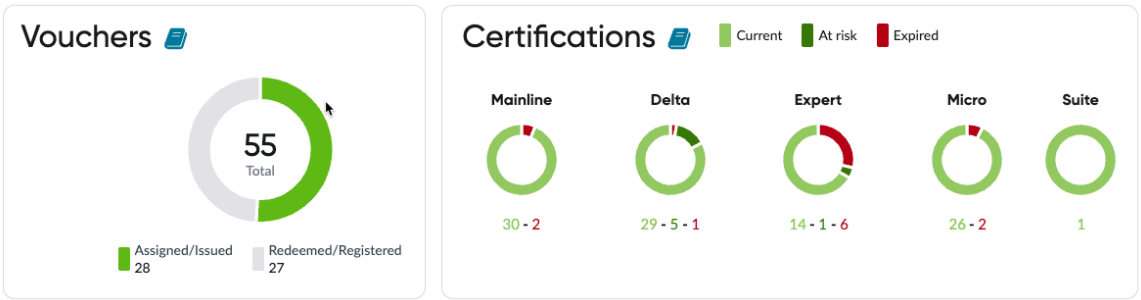
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- On-demand course consumption



- Number of certifications available and status of taken certifications:
  - Level of expertise required to achieve a certification type
  - Statuses included current, at risk for expiration, and expired certifications



- Customer self-service model for the consumption of learning credits
- Better understand your entitlements charted in Impact

Initiatives and Accelerators

Initiatives are the actionable engagements and work streams that support your digital transformation. Impact Accelerators are fixed-scope offerings with experts behind each option to provide value exactly where you need it.

Accelerators and initiatives are shared between the Impact store app and Impact Delivery Instance (IDI). There may be differences in navigation when accessing Accelerators and initiatives between the platforms.

Note: Contact your admin for upgrades to the latest Impact Store content app, so you can access all available Accelerators and initiatives in accordance to your package entitlement.

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Overview of Initiatives

Your Impact squad recommends Initiatives that are right for you, typically shared by you and your squad.

- **Your initiatives**: Initiatives that are delivered as part of your package entitlement
- **Initiatives roadmap**: Captures the work that other teams are doing in a consolidated view of all workstream initiatives that are underway

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Initiatives catalog



Initiatives can range from advisory sessions to Squad-led engagements.

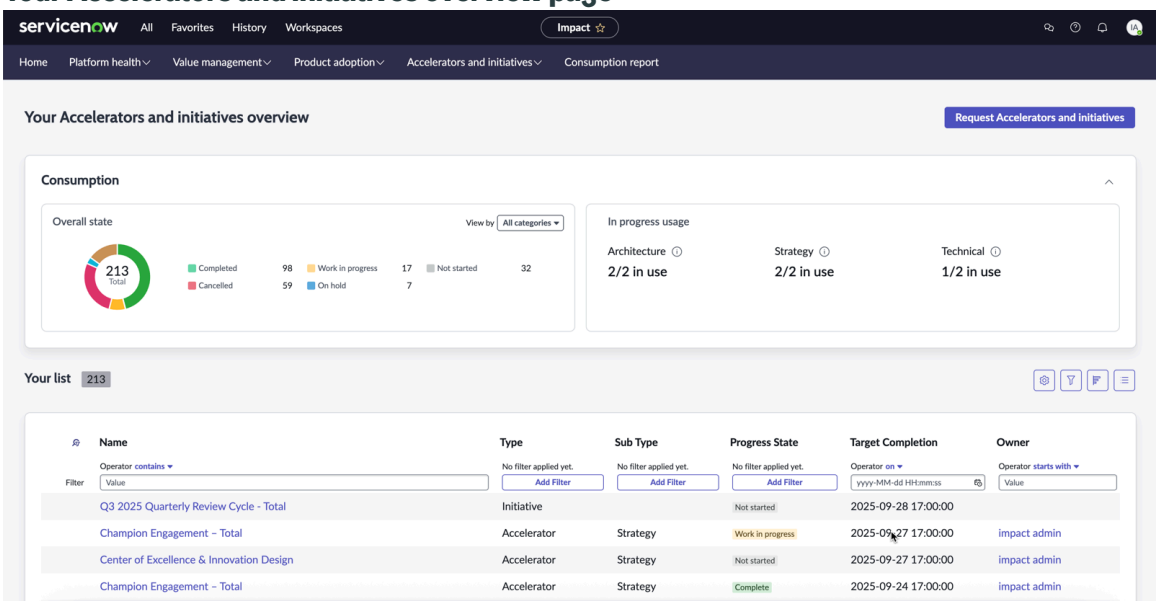
Overview of Accelerators

With Impact Accelerators, you receive:

- Valuable information, recommendations, and insights in a short time frame, so you get value quickly.
- Expert attention on specific goals such as upgrade readiness, product adoption, and more.

Explore the Accelerators and initiatives page by navigating to **All > Impact > Accelerator and Initiatives > Overview** from your ServiceNow instance. In the Impact Delivery Instance, **Impact > Initiatives & Accelerators.**. You will find usage status and a list of the Accelerators and initiatives that are associated with the instance.

Your Accelerators and initiatives overview page

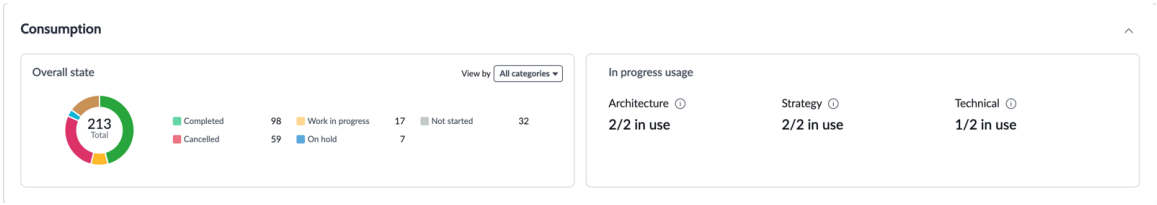


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Consumption

View the pie chart representation of the usage status of the accelerators in the **Overall state** segment. Use the **View by** drop-down to filter the results by category. The report also displays the number of accelerators in use for every category in the **In progress** usage segment.

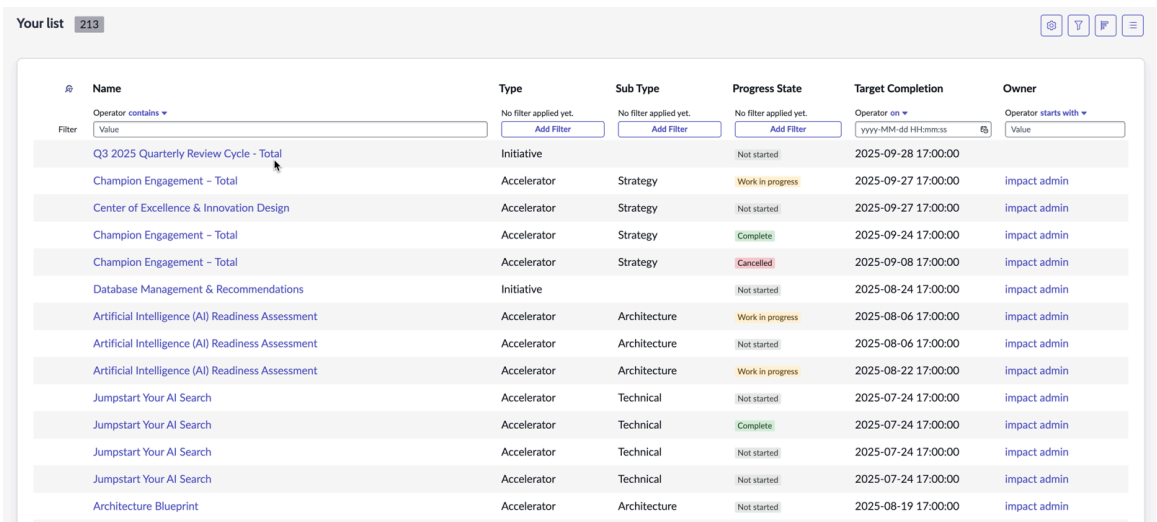
Consumption report



Your List

View a default grid containing the available list of accelerators and initiatives with details such as Name, Type, Sub Type, Progress State, Target completion date, and Owner. The grid also has icons that support various navigation features.

List View of Accelerators and Initiatives



Note: Select the roadmap icon to view the customized timeline view of the scheduled accelerators and initiatives on a calendar by quarter or year.

Navigating your list

Navigate through the list view or roadmap view of the list of accelerators and initiatives using the following features:

- Column Filter: View selective values when you know the granular filter conditions on the columns, using a value filter on the columns.
- Group by Filter: View the list organized in groups for a segmented analysis of the list, by hovering on the column label and selecting the Group by menu in the filter vertical ellipsis.
- Quick Filter: View accelerator information pertaining to a known Priority, Owner, Progress State, or Type by using Quick Filter.
- Edit Columns: Adjust the columnar display in the grid when selective columns make better sense for your search or analysis, by selecting and arranging the columns.

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- Sort columns: Search a column in the sorted view by selecting the column header to sort the columns in ascending or descending order.
- Page Navigation: At the bottom of the page, select the **Records per page** and use the arrows for pagination.

Note: Select the UI controls on the column headers and the icons on the grid to use these features.

Accelerator sub-catalogs

Accelerator availability is defined by your Impact Package and is classified into one of three sub-catalogs, Architecture, Strategy, and Technical Accelerators.

Architecture Accelerators	Strategy Accelerators	Technical Accelerators
		
Gain a foundational understanding of business outcome maturity with targeted recommendations on what to tackle next to unlock further value from the platform.	Go deeper on organizational and governance best practices with the ServiceNow platform and upskill your team to enhance business performance and drive success.	Accelerate usage and adoption of specific platform and product capabilities via applied demonstrations, personalized coaching, and best practices.

Accelerator catalog



Browse the complete Accelerator catalog that combines all three sub-catalogs into one consolidated list.

Accelerator Recommendations

When requesting an Accelerator, in addition to the sub-catalog, Accelerators can also be sorted by recommendations. Accelerator recommendations are generated based on customer context using data gathered from product subscriptions, objectives, instance data, and peer comparisons. Some of the recommendations are generated by the Artificial Intelligence (AI) engine, while the Impact squad manually recommends others. See Request an Accelerator from IDI for additional information for engaging Accelerators in the IDI and see Request Accelerators and Initiatives for Impact Store Application for the Impact Store Application

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Related topics

View the Initiatives and Accelerators catalog

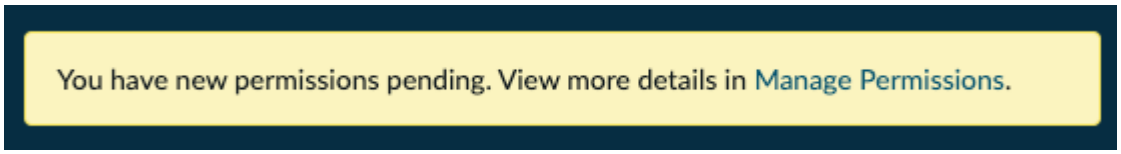
Accelerator request

Manage Initiative and Accelerator permissions

Review and approve Initiative and Accelerator activities access using **Manage Permissions**.

About this task

If you have pending Initiatives and Accelerators that require permissions to be granted, a message displays on the Impact homepage that directs you to **Manage Permissions**.



The following table contains available consent statuses and actions.

Status	Description	Available Actions
Pending	A requested activity is waiting approval to be started	• **Approve** • **Decline**
Accepted	A requested Initiative or Accelerator has been approved and may be started. A permissions authorizer may revoke permission.	**Revoke Permission**: The user will not be able to start the initiative.
Declined	A requested Initiative or Accelerator has been declined and may not be started	**Update Permission**: Grant permission to the activity to confirm permission.

Restricted and protected environments

As part of our mission to continually deliver the best customer experience and as part of the evolution of the Impact packages, certain Impact deliverables, Impact Accelerators, or other Impact components require supplemental terms and conditions because of the manner in which they operate.

U.S. Public Sector (USPS)

The US Public Sector Accelerators provide U.S. Public Sector customers an option to leverage aspects of these Accelerators without the need to accept the supplemental terms or in scenarios in which an environment may have serviceability restrictions.

Accelerators that offer USPS specific versions are indicated in the specific sub-catalog.

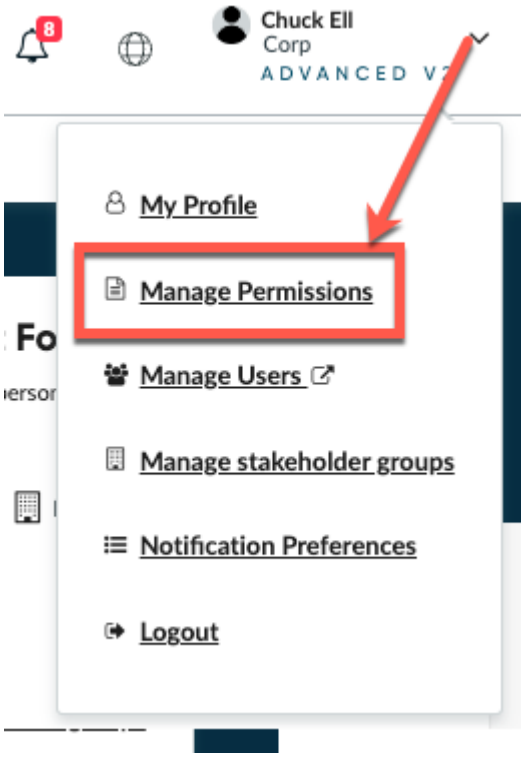
Before you begin

Role required: Impact Permissions Authorizer

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Procedure

1. Navigate to **Impact** > **<Your> profile** > **Manage Permissions** or select **Manage Permissions** from the homepage banner.



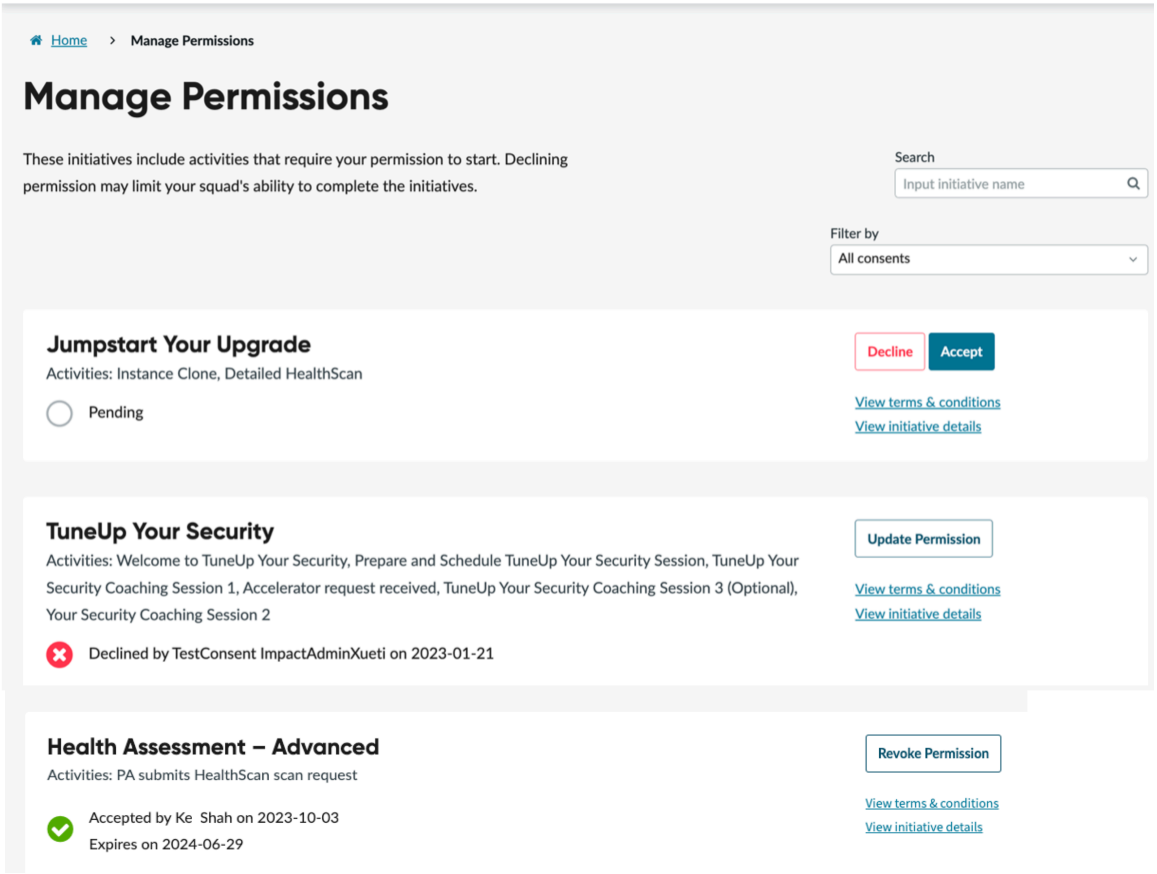
   Manage Permissions opens and you can filter the list by entering in the name of the Impact activity in the **Search** field or by **Consents** status.

2. Manage activity permission records on this page.

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a. Select **Update Permission** or **Revoke Permission** to change the permissions for an Accelerator or Initiative, if previously declined or approved.

b. Select **Accept** or **Decline** to approve or deny a pending request.

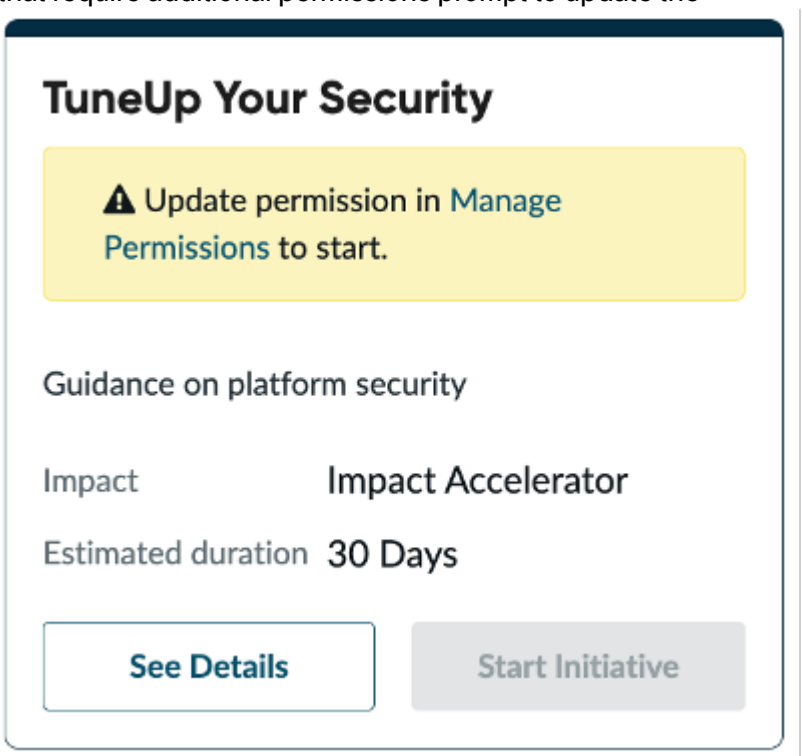


What to do next

Once permission has been granted, the Accelerator is active for users to start.

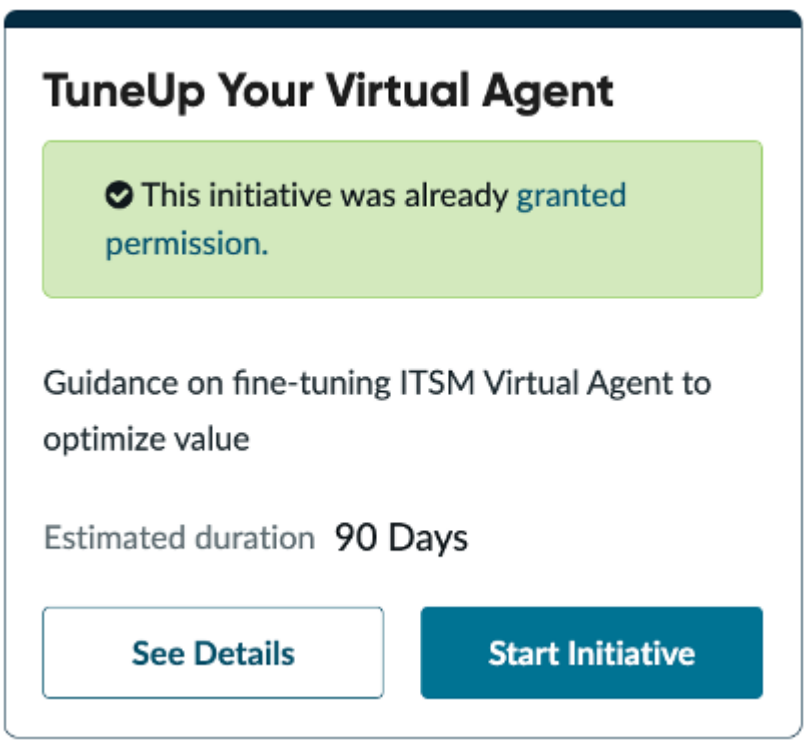
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Accelerators that require additional permissions prompt to update the permissions.



Accelerators that have been granted permissions will display as such.

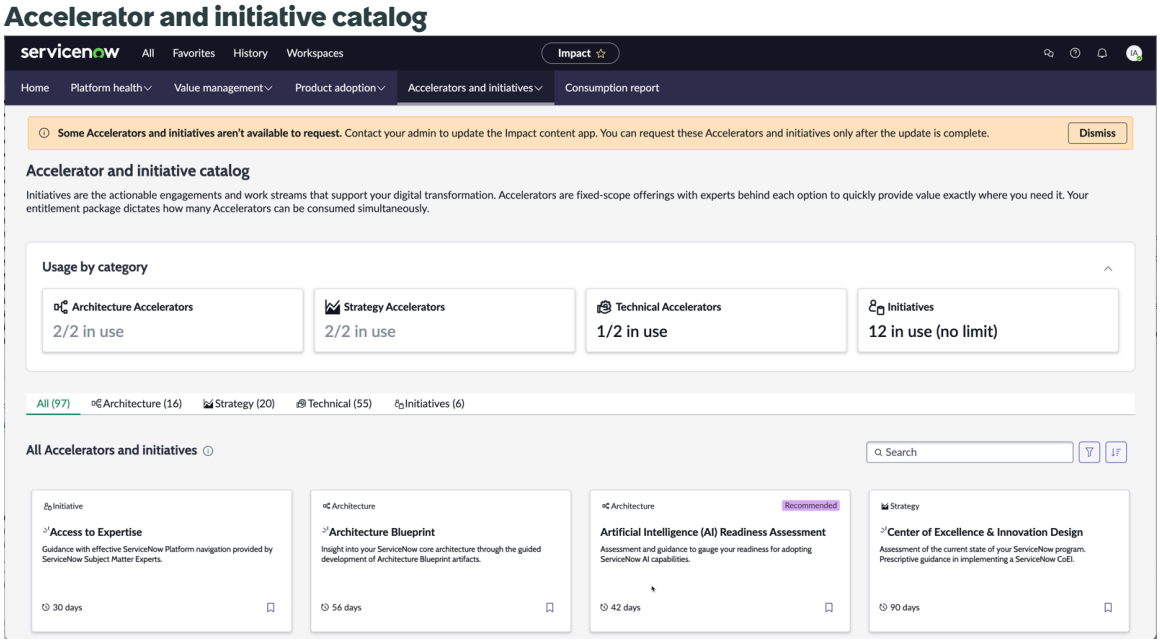
The option to **Start Initiative** becomes available.



View the Initiatives and Accelerators catalog

Learn about available Accelerators and initiatives that you can request to help achieve your business outcomes for your instance.

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Usage by category

The catalog page displays the number of accelerators and initiatives in use along with the entitled usage limits. For example, 1/2 in use indicates that the instance uses one accelerator out of the permissible limit of two. You can choose to browse the catalog of accelerators and request another suitable accelerator to make the best use of the entitlement in the package.

Note: The number of Accelerators and initiatives that you are entitled to is based on your subscription package. See Impact packages for additional information.

All Accelerators and initiatives

The **All** tab displays flash card views of all the available accelerators and initiatives. Each flash card displays the estimated duration of delivery and a short description that serves as a quick reference.

Note:

The **Recommended** label on a flash card indicates Accelerators that have improved the business outcomes for many other customers. Therefore, you might want to check those cards first because they might be useful when you explore new accelerators for your business. The Impact squad also recommends some of these accelerators based on data.

The tabbed view of Accelerators and initiatives offers the following views of the accelerators and initiatives:

- Filtered view: View selective flash cards based on filters such as Bookmarked, Recommended, Request History, or Type by using the Quick Filter icon ( ).
- Sorted view: View organized flash cards sorted by alphabetical order, creation time, and duration by using the Sort icon ( ).
- Searched view: View a specific accelerator flash card by using the Search icon ( ).

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Bookmark an Accelerator

You can mark an accelerator flash card as a favorite for a quick reference for citations, discussions, decisions, and delivery by selecting the bookmark icon ( ).

You can see a filtered view of bookmarked flash card by using the Quick Filter icon.

Related topics

Request Accelerators and Initiatives for Impact Store Application

Initiatives catalog

This is a complete catalog of Impact initiatives.

Refer to Impact packages for additional information on initiative consumption.

Access to Expertise	Getting started with Developer Support	Preventive Care
		
Seek feature guidance and the most effective path forward provided by subject matter experts.	Gain an understanding of the Developer Support offering and identification of named contacts for requesting Developer Support.	A premium, engineer-led diagnostic of instance performance executed quarterly.

Access to Expertise

The Access to Expertise Initiative connects Impact customers to ServiceNow subject matter experts via personalized virtual coaching sessions.

Initiative overview

Access to Experts sessions offer specialized guidance on various ServiceNow product topics, aimed at accelerating value realization and outcomes on the ServiceNow platform.

Receive prescriptive and actionable guidance on effective strategies to address platform obstacles, processes, and workflows.

An intelligent intake experience matches Impact Customers with suitable experts for tailored sessions aligned with your needs and platform lifecycle stage. Each request focuses on addressing one specific topic or application area per session.

This initiative is available for packages such as Impact Advanced and Impact Total along with the Impact Guided package and Strategic Value or Platform Governance, as add-on.

Topics

Topics covered will primarily focus on the ServiceNow platform, with the potential to include discussions on the following:

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- Automated Test Framework (ATF)
- Customer Service Management (CSM)
- IT Operations Management (ITOM)
- IT Service Management (ITSM)
- Platform upgrades
- Reporting, Performance Analytics
- Service Portfolio Management
- Virtual Agent, Now Intelligence (AI)

Request examples

Topic	Example topics or questions
Leading Practices	• IRM Auditing: General guidelines for conducting Information Risk Management audits to enhance security and compliance. • Policy and Compliance Risk Management: General guidelines for ensuring compliance and managing risks effectively within policy frameworks.
Technical How-To	How can we create a mapping in Extract Transform Load (ETL) map assistant for a custom table, such as a PC Hardware table?
Product Capability Overview	How should publisher part numbers be identified and how are software models created automatically in Software Asset Management (SAM)?
Data Model Overview	How do you best build out the Configuration Management Database (CMDB) data model to coincide with the Common Service Data Model (CSDM) service mapping?
Implementation Guidance	How do you set up the workflow for Mobile barcode scanning upon initiation of a request?

Submit queries with detailed information using an intake form. See Request Access to Expertise for details on entering the request.

Request Access to Expertise

Use the Access to Expertise Initiative to connect to ServiceNow subject matter experts via personalized virtual coaching sessions.

Before you begin

Role required: impact admin or impact platform owner

Procedure

1. Navigate to **Impact** > **Initiatives & Accelerators** > **General Initiatives** > **Access to Expertise**.
2. On the Set up initiative form, fill in the fields.

Field	Description
Initiative title	Topic title
Start date	Requested start date

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Field	Description
When do you need this by?	Preferred resolution date
Related business objective	Impact objective selected from the drop-down
Stakeholder group	Available for selection if stakeholder groups are enabled and configured
Instance type	Select if multiple instance types are available, such as production or sub-production
Which instance is this related to?	If multiple instances are available, the drop-down is enabled for selection
Phase of implementation that this request pertains to	Phase available in the drop-down

3. Select a **Primary category** on the What do you need help with? form.
4. Fill out the fields on the Workflow and product details form.

Field	Description
Workflow	The name of the instance specific workflow from the drop-down
Product	The name of the specific instance product from the drop-down
Capability	The name of the specific Impact capability from the drop-down
Description	A very detailed description of the issue or question
Attach a file	Image or document to help clarify the request or explain the issue

5. Enter information of any progress you have made on the request in the What actions have you taken so far? form.
6. Select the technical lead and other important contacts to include for the request on the Who else should be involved? form.
7. **Submit** the form.
   Members of the Impact squad will reach out to you to request additional information, next steps, or with a resolution to your inquiry.
8. Monitor the status and the related tasks under **Impact** > **Initiatives & Accelerators** > **Your initiatives**.

Get started with Developer Support

Get Started with Developer Support is an Impact Initiative that facilitates the understanding of the Developer Support offering and identification of named contacts for requesting Developer Support.

Overview

Get Started with Developer Support helps you expedite identifying technical stakeholder solutions to issues with access to Developer Support. The Initiative includes the following benefits:

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- Enables a ServiceNow Support Account Manager (SAM) to help you determine the stakeholders to be named as contacts for Developer Support access
- Equips admins and developers with a streamlined method for resolving issues associated with existing customizations
- Provides access to a specialized subject matter expert (SME) to assist in troubleshooting customizations
- Delivers insights into customization scope, including business rules, UI (user interface) scripts, script includes, and UI macros
- Provides a review of up to 200 lines of custom code in a break-fix model

Developer Support is available in the Advanced and Total Impact packages and offers expert assistance in troubleshooting and debugging customization-related issues. For more information on Developer Support, see Developer Support.

Developer Support	Troubleshooting and assistance
Specialized SME	Specialized SME to help you troubleshoot your customizations
Broad scope	Customization scope, which includes business rules, UI scripts, script includes, and UI macros
Reviews actual code	Review of up to 200 lines of code
Priority 3 Service Level Agreement (P3- SLA)	Requests are handled on a P3 basis
Break-fix code only	Developer Support only troubleshoots custom code break-fix model and not a preventative model

What you get

Developer Support review session (30 minutes)

- Review of the Developer Support offering and what is in scope and out of scope
- Explanation of the exclusive access provided to the named contacts
- Identification of proper stakeholders to be named contacts for Developer Support
- How to add or edit named contacts for Developer Support
- Walk through of submitting a Developer Support request

Requested customer resources

Customer resource	Responsibilities
Platform Owner (Required)	Responsible for the overall accountability of the ServiceNow platform. Provides leadership and oversight to the system administrators, ensures team alignment to business strategy and the ServiceNow roadmap, and is actively involved in the overarching governance of the platform.
System Administrator(s) (Recommended)	Maintains the stability and usability of the ServiceNow platform by performing application maintenance, managing support for cases related to ServiceNow applications, and contributing to ServiceNow software releases by delivering configuration tasks and features.

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Customer resource	Responsibilities
Developer(s) (Recommended)	Writes code for the ServiceNow platform.
Subject Matter Expert(s) (Recommended)	Non-developers with strong knowledge of processes around customizations.

Exclusions and limitations

Get Started with Developer Support does not include:

- A detailed review of your data
- Technical, hands-on troubleshooting or configuration
- Solutioning and scoping related to performance data
- Decision making

Preventive Care

Preventive Care is a premium, engineer-led diagnostic of instance performance executed on a regular cadence and available as an add-on package to all ServiceNow Impact customers.

Preventive Care Overview

Preventive Care helps maintain optimal performance of large, strategic, ServiceNow implementations. It provides hands on implementation assistance from a ServiceNow performance expert and validation of results ensuring meaningful improvement to platform performance, stability, and end user experience. Based around a bi-annual deep dive into production instance health Preventive Care includes the following benefits:

- Helps ServiceNow performance experts to gain a holistic end-to-end view of instance performance and scalability through manual review over 80 data points covering all aspects of instance operation.
- Uses metrics to uncover areas of resource contention, performance degradation, or misconfiguration, that actively impact the end-user experience or instance stability.
- Delivers a bespoke set of findings and ServiceNow leading practice recommendations which aim to describe the root cause of issues, as well as suggest potential steps for remediation.
- Reduces the burden on customer stakeholders through hands-on assistance to implement recommendations and validation of results ensuring meaningful improvement to implementation quality and end-user experience.
- Delivers insights into instance and infrastructure health trends over time, such as size of instance, active user base, individual application performance, and allows emerging issues to be detected and remediated early.
- Facilitates regular partnership with a ServiceNow expert to discuss findings and grow technical stakeholder knowledge around supporting the ServiceNow platform.
- Builds confidence that the ServiceNow platform can fully support a customer's wider business goals.

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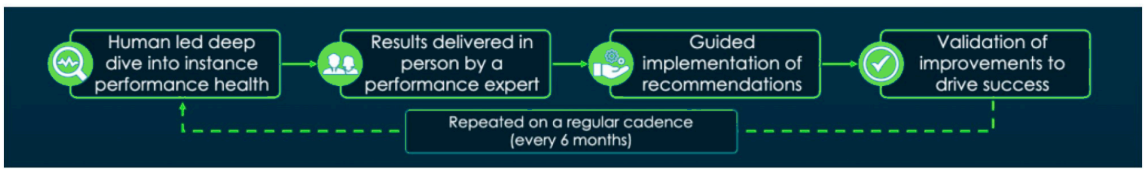
Note: Preventive Care is an add-on package available for all Impact customers with activation. Large or complex ServiceNow implementations may benefit from quarterly (instead of bi-annual) reviews. For further details contact your Impact Customer Success Manager for additional information.

Preventive Care Engagement Phases

Each Preventive Care engagement includes three phases:

1. Performance Engineer-led diagnostic: A metric-based analysis that reviews instance performance and platform health, as well as tracking key utilization metrics over time.
2. Presentation to customer stakeholders: A senior ServiceNow performance expert presents findings and reviews proactive recommendations that address specific issues with the instance that actively impact end user experience, platform stability, database efficiency or cost.
3. Guided Remediation: A focused remediation plan that provides hands-on, guided help to steer a customer through implementing improvements and validating expected results.

Preventive Care Phases



Note: Offered pursuant to the applicable legal description available at https://www.servicenow.com/legal/servicenow-impact.html.

What you get

Customer Kick-off session (Cadence occurs as needed)

- Walk-through process, timelines, and scope of engagement
- Confirm timezones for working alignment
- Understand any specific performance or scalability issues
- Reiterate any time or resource requirements from the customer

Preventive Care Findings Report (per Preventive Care engagement)

Review and discuss the following:

- Holistic assessment of overall instance health, performance and utilization
- Prioritized recommendations to improve instance health, performance, and end user experience
- Guided implementation of recommendations, including assistance with potential third-party components

Preventive Care Engagement Closeout Report (per Preventive Care engagement)

Includes the following:

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- Summary of implemented recommendations at engagement close
- Recap of any recommendations where implementation is outstanding
- Post-implementation performance improvement metrics for completed recommendations

Requested Customer Resources

Customer Resource	Responsibilities
Platform Owner (Required)	Responsible for the overall accountability of the ServiceNow platform. Provides leadership and oversight to the System Administrators, ensures team alignment to business strategy and the ServiceNow roadmap, and is actively involved in the overarching governance of the platform.
System Administrator(s) (Recommended)	Maintains the stability and usability of the ServiceNow platform by performing application maintenance, managing support for cases related to ServiceNow applications, and contributing to ServiceNow software releases by delivering configuration tasks and features.
Developer(s) (Recommended)	Writes code for the ServiceNow platform.
Subject Matter Expert(s) (Recommended)	Non-developers with strong knowledge of processes who are a candidate for Citizen Development.

Exclusions and Limitations

Preventive Care is limited to the following:

- Preventive Care activities are performed bi-annually (however this can be increased to quarterly, if required, at an additional cost).
- Executed against a single, customer-nominated production instance.
- Preventive Care engineer assistance deployment is limited for up to four weeks, following delivery of the Preventive Care report.
- Commercially reasonable assistance on custom or third party components.
- Preventive Care Engineering does not replace normal technical support function nor take ownership of support cases not linked directly to the four week Preventive Care engagement.

Accelerator catalog

This is a complete Impact Accelerator catalog that combines the Architecture, Strategy, and Technical sub-catalogs.

Consumption model

According to your Impact package, Guided, Advanced, or Total, you may consume a fixed number of Accelerators simultaneously.

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Total concurrent Accelerators per Impact package and sub-catalog

Package	Total concurrent Accelerators	Concurrent consumption per sub-catalog		
		Strategy	Architecture	Technical
Total	Six	Two	Two	Two
Advanced	Three	One	One	One
Guided	One at a time across one catalog			
Strategic Value Add-On	Two per add-on	Two		
Platform Governance Add-On	Two per add-on		Two	

Note:

- Refer to Release Notes and Upgrades to identify the most recently added or updated Accelerators.
- The Impact team shall be scheduled based on resource availability.

Accelerators available in each package

Accelerator outputs and formats have common standardized features, but may differ from package to package. Not all Accelerators are available for each package. The Accelerators and available feature levels are denoted by these symbols:

- ✓ = Common standardized feature set
-  = Includes unique accelerator-specific features
-  = Includes additional unique accelerator-specific features

Restricted and protected environments

As part of our mission to continually deliver the best customer experience and as part of the evolution of the Impact packages, certain Impact deliverables, Impact Accelerators, or other Impact components require supplemental terms and conditions because of the manner in which they operate.

U.S. Public Sector (USPS)

The US Public Sector Accelerators provide U.S. Public Sector customers an option to leverage aspects of these Accelerators without the need to accept the supplemental terms or in scenarios in which an environment may have serviceability restrictions.

Accelerators that offer USPS specific versions are indicated in the specific sub-catalog.

Architecture Accelerators

Architecture Accelerators provide a foundational understanding of business outcome maturity with targeted recommendations on what to tackle next to unlock further value from the platform.

Accelerators that offer USPS specific versions are indicated as such in the sub-catalog. See the Accelerator catalog for additional information.

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Architecture Accelerator sub-catalog

Accelerator	Guided package	Guided +Platform Governance	Advanced package	Total package	Restricted and protected environments
Architecture Blueprint		#	#	✓	
Artificial Intelligence Readiness Assessment		#	#	#	
Common Service Data Model (CSDM) Assessment–Total		#		#	
Common Service Data Model (CSDM) Assessment-Application Services (Crawl) - Advanced		#	#		
Common Service Data Model (CSDM) Assessment - Business Services (Run) - Advanced		#	#		
Common Service Data Model (CSDM) Assessment - Foundation Data - Advanced		#	#		
Common Service Data Model (CSDM) Assessment Technical Services (Walk) - Advanced		#	#		

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Architecture Accelerator sub-catalog (continued)

Accelerator	Guided package	Guided +Platform Governance	Advanced package	Total package	Restricted and protected environments
Data Management and Governance		#	#	#	
Design Review		#	#	✓	
Generative AI - Virtual Agent Conversational Catalog		#	#	#	
Health Assessment			✓	⊕	
Integration Strategy		#	#	✓	
Multi-instance Topologies		#	#	#	
Release and Deployment Advisory for Pro-code Development		#	#	#	
Technical Governance		#	#	#	
UX: Catalog Request Experience Review		#	#	#	
UX: Design for Employee Center		#	#	#	
UX: Portal Experience Review		#	#	#	
UX: Taxonomy Design or Review		#	#	#	
UX: Why It Matters and How to Apply It		#	#	#	

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Strategy Accelerators

Use Strategy Accelerators to go deeper on organizational and governance best practices with the ServiceNow platform and upskill your team to maintain business performance and drive success.

Accelerators that offer USPS specific versions are indicated as such in the sub-catalog. See the Accelerator catalog for additional information.

Strategy Accelerator sub-catalog

Accelerator	Guided package	Guided +Strategic Value	Advanced package	Total package	Restricted and protected environments
Center of Excellence & Innovation Design		#	#	✓	
Center of Excellence and Innovation Maturity Assessment Accelerator		#	#	#	
Champion Engagement		#	#	✓	
Citizen Development Program Design		#	#	#	
CoEI Influencing Funding Strategy		#	#	#	
CSM - Maturity Assessment		#	#	#	
Develop Partner Strategy		#	#	✓	
Foundations of AI Governance		#	#	#	
HRSD Maturity Assessment		#	#	#	
IRM Maturity Assessment		#	#	#	
ITOM Maturity Assessment		#	#	#	
ITSM Maturity Assessment		#	#	#	
LSD Maturity Assessment		#	#	#	
On-Demand Value Report	#	*	*	*	
Portfolio Governance		#	#	#	
PPM Maturity Assessment		#	#	#	
ServiceNow Governance				#	

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Strategy Accelerator sub-catalog (continued)

Accelerator	Guided package	Guided +Strategic Value	Advanced package	Total package	Restricted and protected environments
SAM Maturity Assessment		#	#	#	
Staffing and Roles Review		#	#	✅	
Stakeholder Path to Value		#	#	#	
Strategy Governance		#	#	#	
Success Readiness Assessment (SRA)		#	#	#	
Value Potential		#	#	#	
Vision and Strategy		#	#	#	

Note: The * indicates that Guided+ (Strategic Value), Advanced and Total packages can work with their Squad to create a Value Report without requesting the Accelerator.

Technical Accelerators

Technical Accelerators accelerate usage and adoption of specific platform and product capabilities via applied demonstrations, personalized coaching, and best practices. The Accelerators are delivered by the Impact Squad and technical consultants, as necessary.

Accelerators that offer USPS or SPP-AU specific versions are indicated as such in the sub-catalog. See the Accelerator catalog for additional information.

Technical Accelerator sub-catalog

Accelerator	Guided package	Guided +Strategic Value	Guided +Platform Governance	Advanced package	Total package	Restricted and protected environments
Access to Experts		#	#	#	#	
Extend Your AI Search	#	#	#	#	#	
Extend Your Employee Center to Pro	#	#	#	#	#	
Health Assessment – Guided	#					
Introduction to CMDB: Ingestion	#	#	#	#	#	
Introduction to Instance Observer-Guided	#	#	#			

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Technical Accelerator sub-catalog (continued)

Accelerator	Guided package	Guided +Strategic Value	Guided +Platform Governance	Advanced package	Total package	Restricted and protected environments
Introduction to Instance Readiness Assessment	#	#	#			
Jumpstart Your AI Control Tower	#	#	#	#	#	
Jumpstart Your AI Search	#	#	#	#	#	
Jumpstart Your AI Agent Studio	#	#	#	#	#	
Jumpstart Your AI Agents for CSM	#	#	#	#	#	
Jumpstart Your AI Agents for ITSM	#	#	#	#	#	
Jumpstart Your AI Search	#	#	#	#	#	
Jumpstart Your App Engine	#	#	#	#	#	
Jumpstart Your Automated Testing	#	#	#	#	#	
Jumpstart Your CMDB	#	#	#	#	#	
Jumpstart Your CSDM: Crawl	#	#	#			
Jumpstart Your CSDM: Foundation	#	#	#			
Jumpstart Your CSM Configurable Workspace	#	#	#	#	#	
Jumpstart Your Database Management	#	#	#	#	#	
Jumpstart Your Employee Center	#	#	#	#	#	USPS
Jumpstart Your Employee Journey Management	#	#	#	#	#	
Jumpstart Your Event Management	#	#	#	#	#	
Jumpstart Your External Content Connectors	#	#	#	#	#	

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Technical Accelerator sub-catalog (continued)

Accelerator	Guided package	Guided +Strategic Value	Guided +Platform Governance	Advanced package	Total package	Restricted and protected environments
Jumpstart Your GenAI	#	#	#	#	#	
Jumpstart Your Issue Auto Resolution	#	#	#	#	#	
Jumpstart Your ITOM Discovery	#	#	#	#	#	
Jumpstart Your Knowledge Management	#	#	#	#	#	
Jumpstart Your Legacy Workflow Migration	#	#	#	#	#	
Jumpstart Your Migration of Platform Analytics	#	#	#	#	#	
Jumpstart Your Multi-lingual Virtual Agent	#	#	#	#	#	
Jumpstart Your Natural Language Understanding	#	#	#	#	#	
Jumpstart Your Now Assist in Virtual Agent	#	#	#	#	#	
Jumpstart Your Now Assist for Creator	#	#	#	#	#	
Jumpstart Your Now Assist in Document Intelligence	#	#	#	#	#	#
Jumpstart Your Now Assist Skill Kit	#	#	#	#	#	
Jumpstart Your Now Mobile for Employees	#	#	#	#	#	
Jumpstart Your Platform Analytics	#	#	#	#	#	
Jumpstart Your Predictive Intelligence	#	#	#	#	#	
Jumpstart Your Process Mining	#	#	#	#	#	
Jumpstart Your Service Mapping	#	#	#	#	#	
Jumpstart Your Strategic Portfolio	#	#	#	#	#	

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Technical Accelerator sub-catalog (continued)

Accelerator	Guided package	Guided +Strategic Value	Guided +Platform Governance	Advanced package	Total package	Restricted and protected environments
Management - Project Workspace						
Jumpstart your Service Operations Workspace	#	#	#	#	#	
Jumpstart Your ServiceNow AI Journey	#	#	#	#	#	
Jumpstart Your Strategic Portfolio Management - Collaborative Work Management	#	#	#	#	#	
Jumpstart Your Strategic Portfolio Management – Planning Workspace	#	#	#	#	#	
Jumpstart Your Strategic Portfolio Management – Resource Management Workspace	#	#	#	#	#	
Jumpstart Your Subscription Management	#	#	#	#	#	
Jumpstart Your Success Dashboard	#	#	#	#	#	
Jumpstart Your Task Intelligence	#	#	#	#	#	
Jumpstart Your Upgrade	#	#	#	#	#	
Jumpstart Your Virtual Agent	#	#	#	#	#	
Jumpstart Your Workflow Automation: Playbooks	#	#	#	#	#	
TuneUp Your AI Search	#	#	#	#	#	
TuneUp Your CMDB	#	#	#	#	#	
TuneUp Your Employee Center		#	#	#	#	

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Technical Accelerator sub-catalog (continued)

Accelerator	Guided package	Guided +Strategic Value	Guided +Platform Governance	Advanced package	Total package	Restricted and protected environments
TuneUp Your Hardware Asset Management	#	#	#	#	#	
TuneUp Your IT Asset Management	#	#	#	#	#	
TuneUp Your ITOM Discovery	#	#	#	#	#	
TuneUp Your Platform Analytics	#	#	#	#	#	
TuneUp Your Software Asset Management	#	#	#	#	#	
TuneUp Your Security	#	#	#	#	#	
TuneUp Your Virtual Agent - Assessment	#	#	#	#	#	
TuneUp Your Virtual Agent – NLU (Natural Language Understanding)	#	#	#	#	#	
TuneUp Your Virtual Agent – Performance Monitoring	#	#	#	#	#	
TuneUp Your Virtual Agent – UX (User Experience)	#	#	#	#	#	

Architecture Accelerators

Architecture Accelerators provide a foundational understanding of business outcome maturity with targeted recommendations on what to tackle next to unlock further value from the platform.

Accelerators available in each package

Accelerator outputs and formats have common standardized features, but may differ from package to package. Not all Accelerators are available for each package. The Accelerators and available feature levels are denoted by these symbols:

- ✓ = Common standardized feature set
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-  = Includes additional unique accelerator-specific features

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Architecture Accelerator sub-catalog

Accelerator	Guided package	Guided +Platform Governance	Advanced package	Total package	Restricted and protected environments
Architecture Blueprint		#	#	✓	
Artificial Intelligence Readiness Assessment		#	#	#	
Common Service Data Model (CSDM) Assessment–Total		#		#	
Common Service Data Model (CSDM) Assessment-Application Services (Crawl) - Advanced		#	#		
Common Service Data Model (CSDM) Assessment - Business Services (Run) - Advanced		#	#		
Common Service Data Model (CSDM) Assessment - Foundation Data - Advanced		#	#		
Common Service Data Model (CSDM) Assessment Technical Services (Walk) - Advanced		#	#		

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Architecture Accelerator sub-catalog (continued)

Accelerator	Guided package	Guided +Platform Governance	Advanced package	Total package	Restricted and protected environments
Data Management and Governance		#	#	#	
Design Review		#	#	✓	
Generative AI - Virtual Agent Conversational Catalog		#	#	#	
Health Assessment			✓	⊕	
Integration Strategy		#	#	✓	
Multi-instance Topologies		#	#	#	
Release and Deployment Advisory for Pro-code Development		#	#	#	
Technical Governance		#	#	#	
UX: Catalog Request Experience Review		#	#	#	
UX: Design for Employee Center		#	#	#	
UX: Portal Experience Review		#	#	#	
UX: Taxonomy Design or Review		#	#	#	
UX: Why It Matters and How to Apply It		#	#	#	

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Artificial Intelligence Readiness Assessment

The Artificial Intelligence (AI) Readiness Assessment Accelerator provides an assessment and guidance related to your readiness for adoption of ServiceNow Generative AI capabilities (Now Assist).

Accelerator Overview

This Accelerator provides you with an assessment and guidance on your readiness for a selected set of ServiceNow Generative AI Now Assist capabilities. Some example capabilities include:

- Now Assist Q&A Genius Results
- Now Assist Conversational Catalog
- Record summarization (Incident/Change/Case/etc)
- Resolution notes generation
- Knowledge creation
- Chat summarization

Your Impact Squad provides guidance based on your selected Generative AI products (we recommend up to three per accelerator).

See Enable AI experiences for additional information on ServiceNow AI-based tools.

Note: This Accelerator is available for Impact Guided+ (Platform Governance), Advanced and Total Packages.

Prerequisites

Jumpstart Your AI Journey (recommended, not required)

What You Get

The Accelerator activities are led by your Platform Architect (PA).

Introductory Customer Session (up to 2 hours)

- Review the initiative approach and your objectives
- Establish clear expectations regarding the process, your participation, and the level of detail for the deliverable
- Review the ServiceNow AI Blueprint to identify and prioritize the Generative AI capabilities most relevant to your goals.
- Select the three Generative AI Capabilities to focus on

Customer Recommendation Session (up to 2 hours)

- Review your readiness for the selected ServiceNow Generative AI capabilities
- Provide guidance and discuss next steps to further your AI readiness

Follow-up Customer Session (optional upon customer request - up to 60 minutes)

Opportunity for Q&A related to the AI Readiness Assessment guidance

AI Readiness Deliverables

Materials from all collaborative sessions:

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- Session slides
- Analysis reports
- Leading practices & targeted recommendations
- Actionable guidance to support your next steps

Requested Customer Resources

Customer resource and responsibilities

Customer Resource	Responsibilities	Required	Recommended
Platform Owner	Responsible for the overall accountability of the ServiceNow platform. Provides leadership and oversight to the System Administrators, ensures team alignment to business strategy and the ServiceNow roadmap, and is actively involved in the overarching governance of the platform.	#	
Platform Administrator	Responsible for the day-to-day administration of the ServiceNow platform.	#	
Enterprise Architect Lead	Responsible for overall enterprise architecture, strategy, and governance.	#	
Technical Architect Lead	Responsible for overall technical architecture.	#	
ITSM Process Owner	Owns the ITSM process(es) related to the service, or ancillary process. Defines agent incident handling process. Provides requirements for ITSM solution.		#
Customer Service Management (CSM) Process Owner	Owns the CSM process(es) related to the service, or ancillary process. Defines agent case handling process. Provides requirements for CSM solution. Responsible for defining document processing processes.		#
Human Resources Service Delivery (HRSD) Process Owner	Owns the HRSD process(es) related to the service, or ancillary process. Defines agent case handling process. Provides requirements for HRSD solution.		#

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Customer resource and responsibilities (continued)

Customer Resource	Responsibilities	Required	Recommended
	Responsible for defining document processing processes.		
Field Service Management (FSM) Process Owner	Owns the FSM process(es) related to the service, or ancillary process. Defines FSM case handling process. Provides requirements for FSM solution.		#
Finance / Supply Chain Process Owner	Responsible for defining document processing processes (e.g., drafting and inputting purchase orders into ERP system).		#
ServiceNow Development Owner	Owns the ServiceNow developer tools and development processes. Includes building process flows. Identifies automation opportunities.		#

Exceptions

This Accelerator does not include:

- AI solution design
- Implementation of Generative AI capabilities
- Technical troubleshooting or remediation of Generative AI capabilities

Architecture Blueprint

Architecture Blueprint – Advanced

The Architecture Blueprint – Advanced Accelerator provides guidance and insights to develop your Architecture Blueprint artifacts.

Overview

The Architecture Blueprint - Advanced Accelerator provides Impact Customers with example architectural artifacts to support your current ServiceNow environment in order to gain an understanding of the core ServiceNow data architecture, application architecture, and technology infrastructure architecture. An Architecture Blueprint aims to provide you with clear visibility into your ServiceNow architecture to enable more effective platform management, governance, and decision making.

Note: This Accelerator is available for the Impact Advanced package.

What you get

Alignment Customer Meeting (up to 90 minutes)

- Introduce Architecture Blueprint Accelerator
- Set expectations on process and depth of initiative

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- Introduce three architecture categories:
  - Data Architecture
  - Application Architecture
  - Technology Architecture
- Introduce three forms of architecture artifacts:
  - List (aka Catalog)
  - Table (aka Matrix)
  - Diagram
- Communicate expectations for Customer participation
- Define scope in reference to the current architecture implementation and state
- Identify participant roles for the working meetings, per the defined scope
- Request the completion of an intake questionnaire, and any other necessary inputs. See the Requested information/access section for examples.

Three Customer Working Sessions (up to 120 minutes each)

- Introduce Architecture Blueprint and Accelerator to Working Session participants
- Introduce Architecture Blueprint categories, per the defined scope
- Introduce Architecture Blueprint guiding principles, per the defined scope.
- Collaborate with a Platform Architect to identify relevant example templates, per the defined scope, and with guidance from the Platform Architect, discuss Stakeholder needs and start to fill out template content.
- Discuss the next steps for you to continue refining your templates following the conclusion of the initiative

Follow-up Customer Session (optional upon Customer request - up to 60 minutes)

Opportunity for Q & A related to the Architecture Blueprint guidance

Architecture Blueprint Deliverables

- Workshop slides
- Architecture Blueprint templates that have been started with guidance from and in collaboration with your Platform Architect
- Library of Architecture Blueprint example templates to continue building out your ServiceNow Architecture Blueprint artifacts

Requested customer resources

Customer resource and responsibilities

Customer Resource	Responsibilities
Platform Owner / Designee (Required)	Responsible for the overall accountability of the ServiceNow platform. Provides leadership and oversight to the System Administrators, ensures team alignment to business strategy and the ServiceNow roadmap, and is actively involved in the overarching governance of the platform.

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Customer resource and responsibilities (continued)

Customer Resource	Responsibilities
ServiceNow Platform Architect (Required)	Responsible for overall ServiceNow platform architecture, strategy, and governance.
ServiceNow Platform Administrator (Required)	Responsible for the day-to-day administration of the ServiceNow platform.
CMDB Manager (Required)	Maintains the accuracy and integrity of the CMDB configuration data; works with teams to certify data.
Enterprise Architect(s) (Recommended)	Provides a holistic view of the organization's strategy, processes, and other systems, including any necessary policy or organizational requirements. Helps guide the Platform Owner to align with technical or functional standards.
Data Manager (Recommended)	Responsible for overall management and maintenance of ServiceNow data.
Foundational Data Manager (Recommended)	Responsible for the subset of foundational data (e.g. Users, Groups, Locations, Companies, Departments, etc.).
Integration Data Owner (Recommended)	Responsible for one or more integrations (e.g. applications being integrated, data being passed, data flow, process flow, etc.).
Technical Governance Board Lead (Recommended)	Leads the technical governance board that establishes policies and procedures for data, security, development, change, and release.
Project Owner (Recommended)	Responsible for one or more projects (applications being integrated, data being passed, data flow, process flow, etc.). Define and communicate project where data can be impacted for quality, security and risk.
ServiceNow Development Lead (Recommended)	Leads development on the ServiceNow platform.
IT Risk and Compliance Lead (Recommended)	Ensures the organization's security protocols and best practices are followed within the ServiceNow platform.
Security Architect (Recommended)	Responsible for designing, building, testing, and implementing security systems within an organization's IT network.
Application Owner / Manager (Recommended)	Owns and defines data and process flows for a particular process / product (aka application).
Master Services Provider / Delivery Vendor Lead (Recommended)	Leads 3rd party development and / or delivery services.

Requested information / access

- Organization, data, application, integration, process and operating documentation. Specific information request will depend on the defined scope for each initiative delivery.
- Customer may be asked to grant the ServiceNow Impact Squad access to Customer's instance for the purposes of providing the Impact Accelerator during the period of performance.

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Exclusions

- Enterprise Architecture
- Develop detailed architecture blueprint for your ServiceNow applications
- Design your detailed data model
- Develop detailed technical integration specifications
- Develop your detailed application development code release flow

Architecture Blueprint – Total

The Architecture Blueprint – Total Accelerator provides guidance and insights to develop your Architecture Blueprint artifacts.

Overview

The Architecture Blueprint - Total Accelerator provides Impact Customers with example architectural artifacts to support your current ServiceNow environment in order to gain an understanding of the core ServiceNow data architecture, application architecture, and technology infrastructure architecture. An Architecture Blueprint aims to provide you with clear visibility into your ServiceNow architecture to enable more effective platform management, governance, and decision making.

Note: This Accelerator is available for the Impact Total package.

What you get

Alignment Customer Meeting (up to 90 minutes)

- Introduce Architecture Blueprint Accelerator
- Set expectations on process and depth of initiative
- Introduce three forms of architecture categories:
  - Data Architecture
  - Application Architecture
  - Technology Architecture
- Introduce three forms of architecture artifacts:
  - List (aka Catalog)
  - Table (aka Matrix)
  - Diagram
- Communicate expectations for Customer participation
- Define scope in reference to the current architecture implementation and state
- Identify participant roles for the working meetings, per the defined scope
- Request the completion of an intake questionnaire, and any other necessary inputs. See the Requested information/access section for examples.

Five Customer Working Sessions (up to 120 minutes each)

- Introduce Architecture Blueprint and Accelerator to Working Session participants
- Introduce Architecture Blueprint categories, per the defined scope
- Introduce Architecture Blueprint guiding principles, per the defined scope

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- Collaborate with the Platform Architect to identify relevant example templates, per the defined scope, and with guidance from the Platform Architect, discuss Stakeholder needs and start to fill out template content
- Supplement the Working Sessions with additional one-on-one Platform Architect advisory time and artifact development assistance
- Discuss the next steps for you to continue refining your templates following the conclusion of the initiative

Follow-up Customer Meeting (optional upon Customer request - up to 60 minutes)

Opportunity for Q & A related to the Architecture Blueprint guidance

Architecture Blueprint Deliverables

- Architecture Blueprint workshop slides
- Architecture Blueprint templates that have been started with guidance from and in collaboration with your Platform Architect
- Library of Architecture Blueprint example templates to continue building out your ServiceNow Architecture Blueprint artifacts

Requested customer resources

Customer resource and responsibilities

Customer Resource	Responsibilities
Platform Owner / Designee (Required)	Responsible for the overall accountability of the ServiceNow platform. Provides leadership and oversight to the System Administrators, ensures team alignment to business strategy and the ServiceNow roadmap, and is actively involved in the overarching governance of the platform.
ServiceNow Platform Architect (Required)	Responsible for overall ServiceNow platform architecture, strategy, and governance.
ServiceNow Platform Administrator (Required)	Responsible for the day-to-day administration of the ServiceNow platform.
CMDB Manager (Required)	Maintains the accuracy and integrity of the CMDB configuration data; works with teams to certify data.
Enterprise Architect(s) (Recommended)	Provides a holistic view of the organization's strategy, processes, and other systems, including any necessary policy or organizational requirements. Helps guide the Platform Owner to align with technical or functional standards.
Data Manager (Recommended)	Responsible for overall management and maintenance of ServiceNow data.
Foundational Data Manager (Recommended)	Responsible for the subset of foundational data (e.g. Users, Groups, Locations, Companies, Departments, etc.).
Integration Data Owner (Recommended)	Responsible for one or more integrations (e.g. applications being integrated, data being passed, data flow, process flow, etc.).

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Customer resource and responsibilities (continued)

Customer Resource	Responsibilities
Technical Governance Board Lead (Recommended)	Leads the technical governance board that establishes policies and procedures for data, security, development, change, and release.
Project Owner (Recommended)	Responsible for one or more projects (applications being integrated, data being passed, data flow, process flow, etc.). Define and communicate project where data can be impacted for quality, security and risk.
ServiceNow Development Lead (Recommended)	Leads development on the ServiceNow platform.
IT Risk and Compliance Lead (Recommended)	Ensures the organization's security protocols and best practices are followed within the ServiceNow platform.
Security Architect (Recommended)	Responsible for designing, building, testing, and implementing security systems within an organization's IT network.
Application Owner / Manager (Recommended)	Owns and defines data and process flows for a particular process / product (aka application).
Master Services Provider / Delivery Vendor Lead (Recommended)	Leads 3rd party development and / or delivery services.

Requested information / access

- Organization, data, application, integration, process and operating documentation. Specific information request will depend on the defined scope for each initiative delivery.
- Customer may be asked to grant the ServiceNow Impact Squad access to Customer's instance for the purposes of providing the Impact Accelerator during the period of performance.

Exclusions

- Enterprise Architecture
- Develop detailed architecture blueprint for your ServiceNow applications
- Design your detailed data model
- Develop detailed technical integration specifications
- Develop your detailed application development code release flow

Common Service Data Model (CSDM) Assessment Accelerators

These Accelerators provide insights into Common Service Data Model (CSDM) assessment.

- Common Service Data Model (CSDM) Assessment - Foundation Data - Advanced
- Common Service Data Model (CSDM) Assessment-Application Services (Crawl) - Advanced
- Common Service Data Model (CSDM) Assessment Technical Services (Walk) - Advanced
- Common Service Data Model (CSDM) Assessment - Business Services (Run) - Advanced
- Common Service Data Model (CSDM) Assessment– Total

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Common Service Data Model (CSDM) Assessment - Foundation Data - Advanced

This Accelerator provides guidance to assess and improve the Foundation Data that is part of your CSDM framework.

Overview

The Common Service Data Model Assessment - Foundation Data - Advanced Accelerator provides Impact Customers with leading practices content and prescriptive guidance on the CSDM - Foundation Data and how it supports processes within the ServiceNow Platform. Interactions with ServiceNow CSDM Subject Matter Experts and personalized content on CSDM for the Customer's organization are included.

For more information on the CSDM, see Common Service Data Model.

Note: This Accelerator is available in the Advanced package.

What You Get

Introductory Customer Session (up to 120 minutes)

- Review initiative approach and set expectations on process and depth of deliverable
- Review customer's objectives for the initiative
- Communicate expectation for Customer participation

  Note: The CSDM - Foundation Data Assessment initiative requires active customer participation, and may require inclusion of a variety of customer roles to address the breadth of the CSDM Foundation Data's application across the organization.

- Review CSDM basics and CSDM - Foundation Data basics
- Request completion of intake questionnaire, CSDM Foundation Data self-assessment, and provide any other requested inputs

Customer Current State Working Session (up to 120 minutes)

- Discuss CSDM - Foundation Data current state
- Review leading practices content

CSDM Foundation Data Analysis

Platform Architect reviews and analyzes customer's intake questionnaire and CSDM Foundation Data Self-Assessment and prepares recommendations

Customer Recommendation Session (up to 120 minutes)

- Review leading practices content
- Present CSDM - Foundation Data recommendations
- Discuss possible next steps for execution and measurement

Follow-up Customer Session (optional upon Customer request (up to 60 minutes)

- Opportunity for Questions and Answers related to CSDM - Foundation Data
- Provide additional guidance on leading practices

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CSDM Deliverables

- Workshop slides
- CSDM - Foundation Data Self-Assessment
- Recommended next steps

Requested Customer Resources

Customer resource and responsibilities

Customer Resource	Responsibilities
Platform Owner (Required)	Responsible for the overall accountability of the ServiceNow platform. Provides leadership and oversight to the System Administrators, ensures team alignment to business strategy and the ServiceNow roadmap, and is actively involved in the overarching governance of the platform.
Platform Administrator (Required)	Responsible for the day-to-day administration of ServiceNow platform.
Enterprise Architect Lead (Required)	Responsible for overall enterprise architecture, strategy, and governance.
CSDM Champion / Sponsor (Required)	Executive sponsor advocating for CSDM across the entire organization
CSDM Data Modeler / Manager (Required)	Maintains the accuracy and integrity of the CSDM, works with teams to certify data.
CMDB Manager (Required)	Maintains the accuracy and integrity of the CMDB, works with teams to certify data
Application Owner(s) (Optional)	Manages ServiceNow application(s) (e.g., ServiceNow HRSD owner).
Application Service Owner(s) (Optional)	Manages all applications across a given division (e.g., Incident management or HR application owner).
Process Owner(s) (Optional)	Owns the process(es) related to the service, or ancillary process. Defines process flow(e.g., ancillary processes such as: ITSM incident management, ITSM change management, HR employee onboarding, or Customer Service Management requests.)
Service Owner(s) (Optional)	Owns service. Monitors service performance, drives service changes, keeps service data up to date for those services that directly own foundational data like Human Resources, Customer Service Management, Financial Services, Field Services, or Facilities.
Technical Governance Board Lead (Optional)	Leads the technical governance board that establishes policies and procedures for data, security, development, change, and release.
Security Administrator (Optional)	Responsible for installing, administering, troubleshooting security capabilities and configuration that complies with Technical Governance guidance. Promotes adherence to security policies and procedures.

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Customer resource and responsibilities (continued)

Customer Resource	Responsibilities
Master Service Provider/ Vendor Lead (Optional)	Include if customer is using a 3rd party development partner, and that partner is involved in design and/or development of applications and/or services leveraging CSDM framework capabilities.

Requested Information / Access

- CSDM Assessment Intake Questionnaire and CSDM - Foundation Data Self-assessment completed by Customer at least 1 week in advance of Customer Working Session (to be provided by the ServiceNow team)
- Current CSDM Data Model
- Impact materials such as Customer Impact Plan, Architecture Blueprint, Objectives and Outcomes, Capabilities Map and Product Adoption Roadmap

Exceptions

This accelerator does not include the following:

- CMDB assessment
- Discoverable Configuration Items (e.g., servers, mobile devices, software, etc.)
- Assessing CSDM Application Services, Business Services, Technical Services, Portfolio
- Detailed CSDM model design review
- Technical troubleshooting of current implementation of CSDM framework
- Assessing CSDM Application Services, Business Services, Technical Services, Portfolio
- CSDM technical remediation
- Service Mapping troubleshooting
- Detailed review of technical governance processes

Common Service Data Model (CSDM) Assessment-Application Services (Crawl) - Advanced

This Accelerator provides an assessment and guidance for Common Service Data Model (CSDM) Crawl maturity, including Application Services and Business Applications.

Overview

Common Service Data Model Assessment – Application Services (Crawl) - Advanced provides Impact customers with an assessment and guidance based on leading practices related to the CSDM Application Services and Business Applications framework elements. Interactions with#ServiceNow CSDM Subject Matter Experts and personalized content on CSDM for your organization are included.

For more information on the CSDM, see Common Service Data Model.

Note: This Accelerator is available for the Impact Advanced package.

What You Get

The Accelerator activities are led by your Platform Architect.

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Introductory Customer Session (up to 120 minutes)

- Review initiative approach and set expectations on process and depth of deliverable
- Review your objectives for the initiative
- Communicate expectations for participation

> **Note:** The CSDM Application Services Assessment initiative requires active customer participation, and may require inclusion of a variety of customer roles to address the breadth of the CSDM Application Services and Business Applications support across the organization.

- High level review of the CSDM framework and basic review of CSDM Application Services and Business Applications (Crawl maturity)
- Request completion of your intake questionnaire, CSDM Application Services and Business Applications self-assessment, and provide any other requested inputs

Customer Current State Working Session (up to 120 minutes)

- Discuss CSDM Application Services and Business Applications current state
- Review leading practices content

CSDM Self-Assessment Analysis

Your Platform Architect reviews and analyzes your intake questionnaire, CSDM self-assessment, and information gathered to prepare recommendations

Customer Recommendation Session (up to 120 minutes)

- Review leading practices content
- Review and discuss your tailored recommendations to enable you to best configure your Application Services and Business Applications
- Discuss possible next steps for execution and measurement

Follow-up Customer Session (optional upon Customer request (up to 60 minutes)

Opportunity for Questions and Answers related to the guidance provided and next steps

CSDM Deliverables

- Workshop slides
- CSDM self-assessment on CSDM Application Services and Business Applications
- Recommended next steps

Requested Customer Resources

Customer resource and responsibilities

Customer Resource	Responsibilities
CSDM Champion / Sponsor (Required)	Executive sponsor advocating for CSDM across the entire organization

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Customer resource and responsibilities (continued)

Customer Resource	Responsibilities
Platform Owner (Required)	Responsible for the overall accountability of the ServiceNow platform. Provides leadership and oversight to the System Administrators, ensures team alignment to business strategy and the ServiceNow roadmap, and is actively involved in the overarching governance of the platform.
Platform Administrator (Required)	Responsible for the day-to-day administration of ServiceNow platform.
Enterprise Architect Lead (Required)	Responsible for overall enterprise architecture, strategy, and governance.
CSDM Data Modeler / Manager (Required)	Maintains the accuracy and integrity of the CSDM, works with teams to certify data.
CMDB Manager (Required)	Maintains the accuracy and integrity of the CMDB, works with teams to certify data
Application Owner(s) (Required)	Manages ServiceNow application(s) (e.g., ServiceNow HRSD owner).
Application Service Owner(s) (Required)	Manages all applications across a given division (e.g., Incident management or HR application owner).
Process Owner(s) (Optional)	Owns the process(es) related to the service, or ancillary process. Defines process flow(e.g., ancillary processes such as: ITSM incident management, ITSM change management, HR employee onboarding, or Customer Service Management requests.)
Service Owner(s) (Optional)	Owns service. Monitors service performance, drives service changes, keeps service data up to date for those services that directly own foundational data like Human Resources, Customer Service Management, Financial Services, Field Services, or Facilities.
Technical Governance Board Lead (Optional)	Leads the technical governance board that establishes policies and procedures for data, security, development, change, and release.
Security Administrator (Optional)	Responsible for installing, administering, troubleshooting security capabilities and configuration that complies with Technical Governance guidance. Promotes adherence to security policies and procedures.
Master Service Provider/ Vendor Lead (Optional)	Include if customer is using a 3rd party development partner, and that partner is involved in design and/or development of applications and/or services leveraging CSDM framework capabilities.

Pre-requisite

The completion of the Common Service Data Model (CSDM) Assessment - Foundation Data - Advanced Accelerator.

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Requested Information / Access

- CSDM Assessment Intake Questionnaire and CSDM Application Services and Business Applications Self-Assessment completed by the Customer at least one week in advance of the Customer Working Session (to be provided by the ServiceNow team)
- Current CSDM Data Model
- Impact materials, such as the Customer Impact Plan, Architecture Blueprint,Objectives and outcomes, Capabilities Map, and Product Adoption Roadmap

Exceptions

This Accelerator does not include the following:

- CMDB assessment
- Discoverable Configuration Items (e.g., servers, mobile devices, software, etc.)
- High level CSDM model design assistance
- Detailed CSDM model design review
- Assessing CSDM Foundation Data
- Assessing CSDM Business Services, Technical Services, or Portfolio
- Technical troubleshooting of current implementation of CSDM framework
- CSDM technical remediation
- Service Mapping troubleshooting
- Detailed review of technical governance processes

Common Service Data Model (CSDM) Assessment Technical Services (Walk) - Advanced

This Accelerator provides an assessment and guidance for CSDM Walk maturity, including Technical Services and Technical Service Offerings.

Overview

Common Service Data Model Assessment – Technical Services (Walk) - Advanced provides Impact customers with an assessment and guidance based on leading practices related to the CSDM Technical Services and Technical Service Offerings framework elements. Interactions with#ServiceNow CSDM Subject Matter Experts and personalized content on CSDM for your organization are included.

For more information on the CSDM, see Common Service Data Model .

Note: This Accelerator is available for the Impact Advanced package.

What You Get

The Accelerator activities are led by your Platform Architect.

Introductory Customer Session (up to 240 minutes)

- Review initiative approach and set expectations on process and depth of deliverable
- Review your objectives for the initiative
- Communicate expectations for participation

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Note: The CSDM Technical Services Assessment initiative requires active customer participation, and may require inclusion of a variety of customer roles to address the breadth of the CSDM Technical Services support across your organization.

- High level review of the CSDM framework and review of the basics of CSDM Technical Service Offerings (Walk maturity)
- Request completion of your intake questionnaire, CSDM Technical Services self-assessment, and provide any other requested inputs

Customer Current State Working Session (up to 120 minutes)

- Discuss CSDM Technical Services and Technical Service Offerings current state
- Review leading practices content

CSDM Self-Assessment Analysis

Your Platform Architect reviews and analyzes your intake questionnaire, CSDM self-assessment, and information gathered from the working session to prepare recommendations

Customer Recommendation Session (up to 120 minutes)

- Review leading practices content
- Review and discuss your tailored recommendations to enable you to best configure your Technical Services Technical Service Offerings
- Discuss possible next steps for execution and measurement

Follow-up Customer Session (optional upon Customer request (up to 60 minutes)

Opportunity for Questions and Answers related to the guidance provided and next steps

CSDM Deliverables

- Workshop slides
- CSDM self-assessment on CSDM Technical Services and Technical Service Offerings
- Recommended next steps

Requested Customer Resources

Customer resource and responsibilities

Customer Resource	Responsibilities
CSDM Champion / Sponsor (Required)	Executive sponsor advocating for CSDM across the entire organization.
Platform Owner (Required)	Responsible for the overall accountability of the ServiceNow platform. Provides leadership and oversight to the System Administrators, ensures team alignment to business strategy and the ServiceNow roadmap, and is actively involved in the overarching governance of the platform.

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Customer resource and responsibilities (continued)

Customer Resource	Responsibilities
Platform Administrator (Required)	Responsible for the day-to-day administration of ServiceNow platform.
Enterprise Architect Lead (Required)	Responsible for overall enterprise architecture, strategy, and governance.
CSDM Data Modeler / Manager (Required)	Maintains the accuracy and integrity of the CSDM, works with teams to certify data.
Technical Service Owner(s) / Manager(s) (Required)	Owns the technical service and offerings (e.g., servers, applications, databases, networks, cloud, data centers). Monitors service performance, drives service changes, keeps service data up to date. • Service Owner: Strategic role involved in the ownership of services. Typically this person is at the director-level within IT and has end-to-end accountability for a given service and its offerings through the full life cycle. Not heavily involved in the day-to-day operations of the service. • Service Manager: Operational role involved in the management of a service. Typically this person is at the director-level within IT and is responsible for the day-to-day delivery and operation of a service.
CMDB Manager (Optional)	Maintains the accuracy and integrity of the CMDB, works with teams to certify data.
Technical Governance Board Lead (Optional)	Leads the technical governance board that establishes policies and procedures for data, security, development, change, and release.
Security Administrator (Optional)	Responsible for installing, administering, troubleshooting security capabilities and configuration that complies with Technical Governance guidance. Promotes adherence to security policies and procedures.
Master Service Provider/ Vendor Lead (Optional)	Include if customer is using a 3rd party development partner, and that partner is involved in design and/or development of applications and/or services leveraging CSDM framework capabilities.
Technical Process Owner(s) (Optional)	Owns the process(es) related to the technical service, or ancillary process. Defines process flow, with emphasis on those processes that are defining the technical service.
Technical Service Portfolio Owner / Manager (Optional)	Oversees a portfolio of services. Monitors performance of entire portfolio. Portfolio Owner has overall authority, typically at the CIO level.

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Customer resource and responsibilities (continued)

Customer Resource	Responsibilities
	Portfolio Manager is the operational role involved with the overall administration of a portfolio.
Application Owner(s) (Optional)	For application portfolio management purposes, owns the application that underpins the technical service. Owns the application in the CSDM Design domain (Enterprise Architecture).

Pre-requisites

Completion of the following Accelerators:

- Common Service Data Model (CSDM) Assessment - Foundation Data - Advanced
- Common Service Data Model (CSDM) Assessment-Application Services (Crawl) - Advanced

Requested Information / Access

- CSDM Assessment Intake Questionnaire and CSDM Technical Services Self-Assessment completed by the Customer at least one week in advance of the Customer Working Session (to be provided by the ServiceNow team)
- Current CSDM Data Model
- Impact materials, such as the Customer Impact Plan, Architecture Blueprint, Objectives and outcomes, Capabilities Maps, and Product Adoption Roadmap

Exceptions

This Accelerator does not include the following:

- CMDB assessment
- Discoverable Configuration Items (e.g., servers, mobile devices, software, etc.)
- High level CSDM model design assistance
- Detailed CSDM model design review
- Assessing CSDM Foundation Data, Business Services, Technical Services, or Service Portfolios
- Designing your Services model or design review of your Services model
- Designing your Catalog (e.g., hierarchy, taxonomy) or design review of your Catalog
- Technical troubleshooting of current implementation of CSDM framework
- CSDM technical remediation
- Service Mapping troubleshooting
- Detailed review of technical governance processes

Common Service Data Model (CSDM) Assessment - Business Services (Run) - Advanced

This Accelerator provides an assessment and guidance for CSDM Run maturity, including Business Services, Business Service Offerings, Request Catalog Items, and (Business) Service Portfolio.

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Overview

Common Service Data Model Assessment – Business Services (Run) - Advanced provides Impact customers with an assessment and guidance based on leading practices related to the CSDM Business Services, Business Service Offerings, Request Catalog Items, and Service Portfolio framework elements. Interactions with#ServiceNow CSDM Subject Matter Experts and personalized content on CSDM for your organization are included.

For more information on the CSDM, see Common Service Data Model.

Note: This Accelerator is available for the Impact Advanced package.

What You Get

The Accelerator activities are led by your Platform Architect.

Introductory Customer Session (up to 240 minutes)

- Review initiative approach and set expectations on process and depth of deliverable
- Review your objectives for the initiative
- Communicate expectations for participation

  Note: The CSDM Business Services Assessment initiative requires active customer participation, and may require inclusion of a variety of customer roles to address the breadth of the CSDM Business Services support across your organization.

- High level review of the CSDM framework and review of the basics of CSDM Business Services, Business Service Offerings, Request Catalog Items, and Business Service Portfolio (Run maturity)
- Request completion of your intake questionnaire, CSDM Business Services self-assessment, and provide any other requested inputs

Customer Current State Working Session (up to 180 minutes)

- Discuss CSDM Business Services current state, which also includes Business Service Offerings, Request Catalog Items, and Business Service Portfolio
- Review leading practices content

CSDM Self-Assessment Analysis

Your Platform Architect reviews and analyzes your intake questionnaire, CSDM self-assessment, and information gathered to prepare recommendations

Customer Recommendation Session (up to 120 minutes)

- Review leading practices content
- Review and discuss your tailored recommendations to enable you to best configure your Business Services and related elements
- Discuss possible next steps for execution and measurement

Follow-up Customer Session (optional upon Customer request (up to 60 minutes)

Opportunity for Questions and Answers related to the guidance provided and next steps

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CSDM Deliverables

- Workshop slides
- CSDM self-assessment on CSDM Business Services
- Recommended next steps

Requested Customer Resources

Customer resource and responsibilities

Customer Resource	Responsibilities
CSDM Champion / Sponsor (Required)	Executive sponsor advocating for CSDM across the entire organization.
Platform Owner (Required)	Responsible for the overall accountability of the ServiceNow platform. Provides leadership and oversight to the System Administrators, ensures team alignment to business strategy and the ServiceNow roadmap, and is actively involved in the overarching governance of the platform.
Platform Administrator (Required)	Responsible for the day-to-day administration of ServiceNow platform.
Enterprise Architect Lead (Required)	Responsible for overall enterprise architecture, strategy, and governance.
CSDM Data Modeler / Manager (Required)	Maintains the accuracy and integrity of the CSDM, works with teams to certify data.
Business Service Owner(s) / Manager(s) (Required)	Owns the business service and offerings. Monitors service performance, drives service changes, keeps service data up to date for those services, e.g., IT Service Management, Human Resources, Customer Service Management, Financial Management, Field Services, or Facilities. Service Owner: Strategic role involved in the ownership of services. Typically this person is at the director-level within IT and has end-to-end accountability for a given service and its offerings through the full life cycle. Not heavily involved in the day-to-day operations of the service. Service Manager: Operational role involved in the management of a service. Typically this person is at the director-level within IT and is responsible for the day-to-day delivery and operation of a service.
Business Service Portfolio Owner / Manager (Required)	Oversees a portfolio of services. Monitors performance of entire portfolio. Portfolio Owner has overall authority, typically at the CIO level. Portfolio Manager is the operational role involved with the overall administration of a portfolio.

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Customer resource and responsibilities (continued)

Customer Resource	Responsibilities
CMDB Manager (Optional)	Maintains the accuracy and integrity of the CMDB, works with teams to certify data.
Technical Governance Board Lead (Optional)	Leads the technical governance board that establishes policies and procedures for data, security, development, change, and release.
Security Administrator (Optional)	Responsible for installing, administering, troubleshooting security capabilities and configuration that complies with Technical Governance guidance. Promotes adherence to security policies and procedures.
Master Services Provider/ Vendor Lead (Optional)	Include if customer is using a 3rd party development partner, and that partner is involved in design and/or development of applications and/or services leveraging CSDM framework capabilities.
Business Process Owner(s) (Optional)	Owns the process(es) related to the business service. Defines process flow, with emphasis on those processes that are dependent upon the business service. Examples include: IT Service Management Incident Process Owner, IT Service Management Change Process Owner, Customer Service Management Case Process Owner, Field Service Management Work Order Process Owner.
Application Owner(s) (Optional)	For application portfolio management purposes, owns the application that underpins the business service. Owns the application in the CSDM Design domain (Enterprise Architecture)

Pre-requisites

The completion of the following Accelerators:

- Common Service Data Model (CSDM) Assessment - Foundation Data - Advanced
- Common Service Data Model (CSDM) Assessment-Application Services (Crawl) - Advanced
- Common Service Data Model (CSDM) Assessment Technical Services (Walk) - Advanced

Requested Information / Access

- CSDM Assessment Intake Questionnaire and CSDM Business Services Self-Assessment completed by the Customer at least one week in advance of the Customer Working Session (to be provided by the ServiceNow team)
- Current CSDM Data Model
- Impact materials, such as the Customer Impact Plan, Architecture Blueprint, Objectives and outcomes, Capabilities Maps, and Product Adoption Roadmap

Exceptions

This Accelerator does not include the following:

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- CMDB assessment
- Discoverable Configuration Items (e.g., servers, mobile devices, software, etc.)
- High level CSDM model design assistance
- Detailed CSDM model design review
- Assessing CSDM Foundation Data, Application Services, or Technical Services
- Designing your Services model or design review of your Services model
- Designing your Catalog, such as the hierarchy or taxonomy, or design review of your Catalog
- Technical troubleshooting of current implementation of CSDM framework
- CSDM technical remediation
- Service Mapping troubleshooting
- Detailed review of technical governance processes

Common Service Data Model (CSDM) Assessment– Total

Guidance to assess and improve the CSDM framework

Overview

CSDM Assessment provides Impact Customers with leading practices content and prescriptive guidance on the CSDM framework and how it supports processes within the ServiceNow AI Platform. It includes interactions with ServiceNow's CSDM Subject Matter Experts and a personalized assessment and associated content on CSDM for the Customer's organization.

What You Get

Introductory Customer Session (up to 60 min)

- Introduce the CSDM Assessment initiative
- Review initiative approach, scoping process, and depth of deliverables
- Communicate expectations for Customer participation;participation,request Customer participant contacts

> **Note:** The CSDM Assessment entails active Customer participation from a variety of customer roles to address the breadth of the CSDM framework's application across the organization.

- Request completion of information gathering questionnaire, materials, data, and any other inputs

Customer Kick-off Working Session (up to 2 hours

- Review Customer-provided materials
- Introduce CSDM, Its Value and Potential
- Introduce the CSDM Assessment initiative. The Assessment dimensions include:
  - CSDM Maturity (Foundation Data, Crawl, Walk, Run, Fly)
  - People, Process, Technology
- Review initiative approach, scoping process, and depth of deliverables
- Discuss customer's objectives for initiative

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- Discuss current state challenges and perceived obstacles
- Review CSDM Basics

Customer Current State Discovery Working Session (up to 1.5 hours)

- Discuss customer's CSDM Roadmap
- Discuss customer's identified top priority Applications and/or Services
- Review customer's CSDM data model related to top priority Applications and/or Services

Customer Scope Definition Working Session (up to 1.5 hours)

- Review CSDM Guiding Principles
- Define CSDM Assessment Scope taking into consideration the customer's Application/Service priorities and their current CSDM maturity level, and the following scope alternatives:
  - Foundation Data Assessment
  - Crawl Assessment
  - Walk Assessment
  - Run Assessment
  - Fly Assessment

CSDM In-Depth Assessment

- In-Depth Assessment activity for defined scope that includes assessment of People, Process, and Technology.
- The Assessment is performed by the Platform Architect in partnership with the Customer Platform Owner and related data, application, and/or service subject-matter-experts (SMEs).

Customer Review Session (up to 2 hours)

- Present CSDM Assessment findings
- Provide CSDM implementation recommendations
- Align CSDM recommendations with CSDM framework value and outcomes
- Discuss possible next steps for execution of recommendations and measurement of recommendation results

CSDM Assessment Deliverables

- Complete Working Session slide deck, including supplemental CSDM references
- Current State In-Depth Assessment spreadsheet – includes standard recommendations
- Action planning notes for next steps

Follow-Up Customer Session (optional upon Customer request- up to 60 min)

- Opportunity for Q&A related to CSDM
- Provide additional guidance on leading practices

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Requested Customer Resources

Customer representatives will be involved, especially to facilitate access to ServiceNow records and/or tools that will be inspected as part of the CSDM.

Customer resource and responsibilities

Customer Resource	Responsibilities
Platform Owner- Required	
Platform Owner- Required	Responsible for the overall accountability of the ServiceNow platform. Provides leadership and oversight to the System Administrators, ensures team alignment to business strategy and the ServiceNow roadmap, and is actively involved in the overarching governance of the platform.
Platform Administrator- Required	Responsible for day-to-day administration & maintenance, including configuration and support.
Platform Administrator- Required	Responsible for day-to-day administration & maintenance, including configuration and support.
Enterprise Architect- Required	Drives strategic investment decisions by understanding Business capabilities.
CSDM Data Modeler / Manager- Required	Maintains the accuracy and integrity of the CSDM, works with teams to certify data.
CMDB Manager- Required	Maintains the accuracy and integrity of the CMDB, works with teams to certify data.
Application Owner(s)- Required	Manages ServiceNow application(s) (e.g., ServiceNow HRSD owner.)
Application Service Owner(s)- Required	Manages all applications services across a given division (e.g., ITSM or HR application services owner.)
Service Portfolio Owner(s)- Required	Owns a portfolio– collection of Services. Monitors portfolio performance.
Process Owner(s)- Required	Owns the process(es) related to the service, or ancillary process. Defines process flow(e.g. ancillary processes such as: ITSM incident management, ITSM change management, Employee onboarding.)
Technical Governance Board Lead– Required	Leads the technical governance board that establishes policies and procedures for data, security, development, change, and release.
Security Administrator- Required	Leads the administration of ServiceNow security configuration that complies with Technical Governance guidance.

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Customer resource and responsibilities (continued)

Customer Resource	Responsibilities
Master Service Provider/Vendor Lead-Optional	Include if customer is using a 3rd party development partner, and that partner is involved in design and/or development of applications and/or services leveraging CSDM framework capabilities.

Requested Information / Access

- Organization Chart
- ServiceNow Roadmap
- CSDM (Technical) Applications and (Technical/Business) Services Roadmap
- CSDM Information Collection Questionnaire completed by Customer at least 1 week in advance of Customer Kick-off Working Session (to be provided by ServiceNow)
  - CSDM Data Model (template to be provided by ServiceNow)
  - CSDM RACI / Governance model
  - CSDM Data Foundations Dashboard screen captures
  - CMDB Data Model
  - CMDB Data Foundations Dashboard screen captures
- The CSDM Assessment includes inspection of records and tools on the customer's ServiceNow instance. Therefore, the ServiceNow AI Platform Architect will require access to the Customer's instance. A couple of possible methods to satisfy the PA access requirement are:
  - Provide PA with temporary direct login access to system Customer's instance with appropriate roles and permissions to access the necessary records and tools
  - Alternative 2: Pair the PA with a representative employee who has roles and permissions to access the necessary records and tools

Exceptions

This accelerator does not include:

- CMDB assessment
- Detailed CSDM model design review
- Technical troubleshooting of current implementation of CSDM framework
- CSDM technical remediation
- Service Mapping troubleshooting
- Detailed review of technical governance processes

Data Management and Governance

This Accelerator provides insights and guidance to assess and improve your data management and data governance practices.

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Overview

The Data Management and Governance Accelerator provides Impact Customers with a self-assessment, leading practice content, and advisory guidance for managing and governing the data in your ServiceNow implementation to achieve high levels of data quality.

Note: This Accelerator is available in Advanced and Total packages.

What You Get

Introductory Customer Session (up to 60 minutes)

- Introduce five pillars for data management:
  - Data Architecture
  - Data Security
  - Data Quality
  - Data Operations
  - Data Governance
- Set expectations on process and depth of deliverable
- Communicate expectation for participation
- Request the completion of an intake questionnaire, self-assessment, and any other necessary inputs (See the Requested Information Access section for details.)

Customer Current State Working Session (up to 120 minutes)

- Review the customer intake questionnaire and self-assessment
- Discuss the current state of the data management and data governance practices organized around the five pillars for data management

Customer Review Session (up to 120 minutes)

- Present data management and data governance recommendations
- Review leading practice content
- Discuss possible next steps for execution and measurement

Follow-up Customer Session (optional upon Customer request - up to 60 minutes)

Opportunity for Q & A related to data management and data governance guidance

Data Management and Governance Deliverables

- Data Management Self-assessment
- Workshop slides
- Action planning notes
- Action planning templates

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Requested Customer Resources

Customer resource and responsibilities

Customer Resource	Responsibilities
Platform Owner (Required)	Responsible for the overall accountability of the ServiceNow platform. Provides leadership and oversight to the System Administrators, ensures team alignment to business strategy and the ServiceNow roadmap, and is actively involved in the overarching governance of the platform.
Platform Administrator (Required)	Responsible for the day-to-day administration of the ServiceNow platform.
ServiceNow Platform Architect (Required)	Responsible for overall ServiceNow platform architecture, strategy, and governance.
Enterprise Architect(s) (Required)	Provides a holistic view of the organization's strategy, processes, and other systems, including any necessary policy or organizational requirements. Helps guide the Platform Owner to align with technical or functional standards.
Data Manager (Required)	Responsible for overall management and maintenance of ServiceNow data.
Foundational Data Manager (Required)	Responsible for the subset of foundational data, such as, users, groups, locations, companies, and departments.
Representative of Chief Information Security Officer (Required)	Responsible for the organization's security policies, processes, practices, and technologies. Promotes adherence to security policies and procedures. Helps guide the Platform Owner to align with security standards.
Security Administrator (Required)	Responsible for installing, administering, troubleshooting security capabilities, and configuration that complies with Technical Governance guidance. Promotes adherence to security policies and procedures.
Compliance and Audit Officer (Required)	Responsible for compliance, risk management, and audit procedures.
CMDB Manager (Recommended)	Maintains the accuracy and integrity of the CMDB configuration data; works with teams to certify data.
Data Owners (Recommended)	Responsible for data related to a process, product, or an integration.

Requested Information / Access

Customers must provide the following supporting documentation from their ServiceNow platform implementation:

- Data Architecture, Data Model / Logical Data Model / Data Dictionary
- Information Needs Matrix (Actor / Data)
- Reporting Needs Matrix (Actor / Data / Report)
- Data Categorization Matrix
- Data Sources Matrix

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- RACI for Data Management
- Impact materials, such as Customer Impact Plan, Architecture Blueprint,Objectives and outcomes, Capabilities Map, and Product Adoption Roadmap

Exclusions

- Provide data escalation remediation
- Provide technical hands-on assistance with data configuration, data customization, or data troubleshooting
- Provide coverage of data management, data governance, or both, for your non-production environments (For example, development, test, or user acceptance test (UAT))
- Define your data strategy
- Define your data design
- Define, document or both, of your data architecture
- Assess or troubleshoot your CMDB (Refer to the TuneUp Your Configuration Management Database Accelerator
- Assess or troubleshoot your implementation of the CSDM framework (Refer to the Common Service Data Model (CSDM) Assessment - Foundation Data - Advanced Accelerator)
- Define your data and integrations with external systems or applications
- Assess or troubleshoot your data integrations

Design Review

These Accelerators provide an evaluation of current or proposed solution design.

Design Review- Advanced

Design Review- Advanced provides Impact Advanced Customers with a review of either a solution to be implemented or an existing implemented solution, either as it pertains to the ServiceNow AI Platform.

The Accelerator aims to assist Customers in making the best possible solution design decisions that result in better scalability, sustainability, maintainability, and upgradability and leverage the power of the native platform to avoid technical debt and future-state limitations.

What You Get

Introductory Customer Session (up to 60 min)

- Set expectations on process and depth of deliverable
- Communicate expectation for Customer participation
- Provide Design Review questionnaire
- Request data and any other inputs

Customer Working Session (up to 120 min)

- Review current state of solution design
- Discuss leading practice content
- Propose action plan items for Customer to execute

Design Review Deliverable

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- Review of what application(s) are being reviewed, pain points and use cases
- Aggregation of recommendations from Impact Squad

Customer Review Session (up to 60 min)

Review Design Review Deliverable.

Follow-Up Customer Session (optional upon Customer request - up to 60 min)

- Opportunity for Q&A related to solution design
- Provide additional guidance on leading practices

Requested Customer Resources

Customer resource and responsibilities

Customer Resource	Responsibilities
Platform Owner- Required	Responsible for the overall accountability of the ServiceNow platform. Provides leadership and oversight to the System Administrators, ensures team alignment to business strategy and the ServiceNow roadmap, and is actively involved in the overarching governance of the platform.
Executive Sponsor - Required	Primary strategic contact for ServiceNow.
ServiceNow development team lead – Required	Leads development on the ServiceNow platform.
Process Owner- Recommended	Owns the process being reviewed.

Requested Information / Access

- Design Review questionnaire completed by Customer at least 1 week in advance of Customer Working Session (to be provided by ServiceNow)
- Story documents to review for customizations (process documents; design decisions; implementation SOW if a partner is involved)
- Outcomes, value expectations, KPIs, and metrics
- Integration considerations
- Architecture blueprints (if available) for both process and technical approach (plug-ins, etc.)
- Detailed description of use case for application being reviewed (should include personas)
- Detailed description of pain point(s) for application being reviewed (if applicable)

Exceptions

A design review may only be performed for the following cases:

In the case where an already-implemented application is being reviewed, Customer can request a design review from only the following list of applications:

- Incident
- Problem
- Service Catalog

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- Service Portal
- Knowledge
- Release
- Agile

In the case where a design of a solution to be implemented is being reviewed, Customer can request a design review from only the following list of applications:

- Incident
- Problem
- Service Catalog
- Service Portal
- Knowledge
- Release
- Agile

For design reviews of custom applications, the complexity of the design must be small-to-medium complexity as determined in the sole discretion of the Impact Accelerator Consultant(s) delivering the Accelerator.

ServiceNow is not responsible for development of the solution design or execution of any recommendations.

Design Review- Total

Design Review Total provides Impact Total Customers with a review of either (1) a solution to be implemented or (2) an existing implemented solution, either as it pertains to the ServiceNow AI Platform.

It aims to assist Customers in making the best possible solution design decisions that result in better scalability, sustainability, maintainability, and upgradability and leverage the power of the native platform to avoid technical debt and future-state limitations.

What You Get

Introductory Customer Session (up to 90 minutes)

- Describe and introduce the Accelerator
- Define scope (Customer may select one Application within one Capability):
  - Platform Application (1 Capability; 5-6 Key Decision)
  - Custom Application (1 Capability; 3-5 Key Decisions)
  - Custom Application to Platform Application Transition (1 Capability; 5-6 Key Decisions)
- Define Accelerator work plan schedule and specify roles/responsibilities
- Request Customer pre-work and any other inputs

Customer Working Session (up to 12 hours – split across 2-day workshop)

- Review current state of solution design
- Discuss design purpose perspectives (business, functional, technical, implementation)

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- Identify Key Decisions
- Capture risks & issues
- Define success metrics
- Review basic design guidance

Customer Review Session (up to 4 hours)

Review Design Review Deliverable

Design Review Deliverable, Final Presentation including:

- Initial Accelerator scope and expectations
- Outputs of Customer Working Session
- Observations & Diagnosis
- Return to out-of-box path, if applicable
- Prescriptive recommendations
- Outstanding decisions to be made
- Additional leading practice resources, if applicable

Follow-up Customer Session (optional upon Customer request- up to 60 minutes)

- Opportunity for Q&A related to solution design
- Provide additional guidance on leading practices

Requested Customer Resources

Customer resource and responsibilities

Customer Resource	Responsibilities
Platform Owner- Required	Responsible for the overall accountability of the ServiceNow platform. Provides leadership and oversight to the System Administrators, ensures team alignment to business strategy and the ServiceNow roadmap, and is actively involved in the overarching governance of the platform
Business/Platform Owner- Required	As related to the Accelerator's scope – responsible for the business(es) / process(es) that may be part of ServiceNow solution design
Design Lead/Team- Required	As related to the Accelerator's scope – responsible for ServiceNow solution design
Sr. Functional Service Owner(s)- Required	As related to the Accelerator's scope – responsible for the service(s) that may be part of ServiceNow solution design
Sr. Functional Business Owner(s)- Required	As related to the Accelerator's scope – responsible for the business(es) that may be part of ServiceNow solution design

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Requested Information/Access

Platform Background documents, including:

- Platform History information- Platform Implementation Date / Version; Application Families Implemented; Current Implementations; Current or Former Partners; Platform Governance; Platform Administration Team
- Platform Standing information- Architectural Diagram/s; Integration Map/s; Open performance or platform issues; Next planned upgrade; CSDM / CMDB Maturity; User Community information; Release Management Approach; Change Management Approach; DevOps Information

Application Background documents, including:

- Business Case information– Organizational Goals and Objectives; Use Cases; Related Process Flows; Related Roles & Responsibilities Document; Process Owner(s); Business Case; Benefit Case
- Business Consideration information– Enablement Approach; Organizational Change Management Approach; Policy / Procedure / Standard Requirements; Audit / Remediation Requirement(s)
- Open Issues information- Open user issues / feedback; Known business process gaps

Design Approach documents, including:

- Architectural Decision information– Architectural Decision History; Alternate Options Considered; Areas where Platform Architecture support is needed
- Design Approach information– Complete set of User Stories with technical approach; Process Documentation, based on design; Handover Documentation
- Development Cycle information- Full-cycle Testing results; List of all related Defects; Change and Release History, as available

- Business Presentation slides (to be provided by ServiceNow for Customer to complete)
- Architecture Presentation slides (to be provided by ServiceNow for Customer to complete)

Exceptions

This Accelerator does not include in-depth technical reviews of any design – the recommendations will be based on the analysis discovered and reviewed in the Customer Working Session.

ServiceNow is not responsible for development of the solution design or execution of any recommendations.

Generative AI - Virtual Agent Conversational Catalog

The Generative AI -Virtual Agent Conversational Catalog Accelerator provides guidance on conversational compatibility of a select set of your catalog request items.

Accelerator overview

Generative AI – Virtual Agent Conversational Catalog assists Impact customers in identifying request catalog items that are compatible with the conversational catalog experience in their Virtual Agent. Includes interactions with ServiceNow Impact Platform Architect and personalized content.

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Refer to Catalog Conversational Coverage for additional information.

Note: This Accelerator is available for Impact Advanced and Total packages.

What you get

Introductory customer session (up to 120 minutes)

Complete the intake questionnaire at least one week in advance for preparation for the session.

- Review initiative approach and set expectations on process and depth of deliverable
- Review customer's objectives for the initiative
- Communicate expectations for customer participation
- High level review of the basics of the conversational catalog along with an overview of the Virtual Agent user experience

Customer current state working session (up to 120 minutes)

Review and discuss your selected catalog items and their current conversational capability

Customer recommendation session (up to 120 minutes)

- Review leading practices related to catalog item design aspects that best support a Virtual Agent conversational experience
- Review and discuss your tailored recommendations to guide you on how you might evolve non-conversational catalog items to make them conversational
- Discuss the possible next steps to implement the recommendations and techniques to measure the results of the improvements

Follow-up customer session (optional upon customer request - up to 60 minutes)

Opportunity for Q&A related to the guidance provided and next steps

Gen AI - Virtual Agent conversational catalog deliverables

- Workshop slides
- Conversational compatibility insights for selected catalog items
- Recommended next steps

Requested customer resources

One or more customer resources are requested. The specific number of resources provided is Accelerator and customer specific.

Customer resource and responsibilities

Customer resource	Responsibilities	Required	Optional
Platform owner	• Responsible for the overall accountability of the ServiceNow platform. • Provides leadership and oversight to the System Administrators	#	

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Customer resource and responsibilities (continued)

Customer resource	Responsibilities	Required	Optional
	• Ensures team alignment to business strategy and the ServiceNow roadmap • Actively involved in the overarching governance of the platform.		
Platform administrator	• Responsible for the day-to-day administration of#ServiceNow #platform. • Implements and configures catalog request items and/or record producers.	#	
Catalog owner	Accountable for the Catalog including catalog hierarchy (taxonomy) and catalog items within the catalog.	#	
Master Services Provider / Vendor lead	Include if customer is using a 3rd party development partner, and that partner is involved in design and/or development of the service catalog(s).		#

Prerequisites

Install the following in advance:

- AI Search, and ideally, Now Assist in AI Search
- Virtual Agent (NLU) or Now Assist in Virtual Agent
- Conversational catalog overview dashboard

Note: If you've installed Now Assist for conversation request submission plugin, you get the Catalog Conversational Experience plugin (`sn_catalog_con_cov`) by default.

Requested Information / Access

- Complete and return the Intake Questionnaire that was provided by the Impact team at least one week prior to the customer introduction session
- Impact materials, such as the Customer Impact Plan, Architecture Blueprint, Blue Print, Capabilities Maps, and Product Adoption Roadmaps

Exceptions

This Accelerator does not include the following:

- Technical remediation of non-conversational catalog items to make them conversational
- Catalog item design review outside of conversational compatibility
- Catalog design

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Health Assessment

The Health Assessment Accelerators provide insights into your instance health.

- Health Assessment – Advanced
- Health Assessment - Total

Health Assessment – Advanced

The Health Assessment – Advanced Accelerator provides guidance to measure and improve your ServiceNow instance health.

Overview

Health Assessment- Advanced provides Impact Advanced customers with prescriptive guidance, leading practice content, and a technical analysis of their ServiceNow instance health via a HealthScan scan. Also included is a review of key platform health indicators, such as instance manageability, performance, security, upgradability, and user experience. This Accelerator aims to help you understand how your instance aligns with leading practices and improve your instance health.

Note: This Accelerator is available for the Impact Advanced package.

What You Get

Introductory Customer Session (up to 60 minutes)

- Set expectations on process and depth of deliverable
- Review the current state of the customer instance
- Communicate expectations for customer participation
- Request data and any other inputs

Exception Discussion Customer Session (optional depending on customer need - up to 30 minutes)

Discuss exceptions to be configured for the scan

Health Assessment

Health assessment using ServiceNow HealthScan

Customer Read-out Session (up to 90 minutes)

Review of:

- Health Assessment Scorecard
- Detailed Health Assessment findings from the HealthScan scan
- How to interpret Health Assessment scan findings
- Prioritization approaches

Coaching Session (optional upon customer request – up to 60 minutes)

- Opportunity for Q&A related to HealthScan findings
- Provide additional guidance on leading practices, as needed
- Review findings to potentially identify exceptions to be configured for the next scan

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Requested Customer Resources

Customer resources and responsibilities

Customer Resource	Responsibilities
Platform Owner - Required	Responsible for the overall accountability of the ServiceNow platform. Provides leadership and oversight to the System Administrators, ensures team alignment to business strategy and the ServiceNow roadmap, and is actively involved in the overarching governance of the platform.
Platform Administrator - Required	Maintains the stability and usability of the ServiceNow platform by performing application maintenance, managing support for cases related to ServiceNow applications, and contributing to ServiceNow software releases by delivering configuration tasks and features.
Platform Architect- Required	Provides a holistic view of the organization's ServiceNow strategy, processes, and other systems, including any necessary policy or organizational requirements. Helps guide the Platform Owner to align with technical or functional standards.
Enterprise Architect(s) - As applicable	Provides a holistic view of the organization's strategy, processes, and other systems, including any necessary policy or organizational requirements. Helps guide the Platform Owner to align with technical or functional standards.
Lead Developer(s) - As applicable	Writes code for the ServiceNow platform.
Application Owner(s) – As applicable	Owns ServiceNow applications or applications integrated with ServiceNow that are of interest with regard to ServiceNow instance and application health.

Requested Information / Access

Prior to beginning the Accelerator, you must provide your consent for ServiceNow resources to scan your instance. You are prompted for consent when you submit your Health Assessment Accelerator request.

We request for you to complete an information gathering questionnaire, including requests for the following:

- Identify the ServiceNow non-production instance to be scanned
  - When you submit your Accelerator request in Impact, you're prompted to provide a candidate instance to run the HealthScan scan.
  - An instance close to production or, optimally, a recent clone of the production instance is recommended.
- Provide your ServiceNow environment information, such as upgrades planned, clones scheduled, and code release schedules.
- Provide read-out meeting participants.
- Optional: Provide any exceptions that you request to be configured for the scan.

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For Customer Agreements and Terms, refer to the applicable Impact Accelerator Description available at https://www.servicenow.com/legal/servicenow-impact.html

Exclusions

- This Impact Accelerator is not available to:
  - Managed service providers, except for their internal use
  - Customers requiring security clearance
  - Customers operating a domain-separated environment.
- Certain Impact Accelerator activities may be limited or unavailable for customers in certain restricted environments or to self-hosted customers.
- Certain Impact Accelerator activities will not be available to:
  - Customers not hosted in a ServiceNow datacenter.
  - Customers that will not allow execution of a HealthScan scan on their instance.
- This Accelerator does not include:
  - Reviews of design, process, strategy, or governance.
  - The implementation of recommended changes.
  - Any configuration changes within the customer's sub-production or production instances.
- Health Assessment is a platform-wide review and excludes application specific reviews.

Health Assessment - Total

The Health Assessment - Total Accelerator provides guidance to measure and improve your ServiceNow instance health.

Overview

Health Assessment – Total provides Impact Total customers with prescriptive guidance, leading practices content, and a technical analysis of their ServiceNow instance health via a HealthScan scan. A review of key platform health indicators, such as instance manageability, performance, security, upgradability, and user experience is also included. This Accelerator aims to help you understand how your instance aligns with leading practices and to improve your instance health.

Note: This Accelerator is available for the Impact Total package.

What You Get

Introductory Customer Session (up to 60 minutes)

- Set expectations on process and depth of deliverable
- Communicate expectations for customer participation
- Request data and any other inputs

Health Assessment

Health Assessment scan using ServiceNow HealthScan

Customer Working Session #1 (up to 120 minutes)

Review of:

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- Detailed findings from the Health Assessment scan
- How to interpret Health Assessment scan findings
- Platform Architect recommendations

Customer Working Session #2 (up to 120 minutes)

- Provide additional guidance on leading practices and exception management, as needed
- Opportunity for Q&A related to HealthScan scan findings

Leading practices

Requested Customer Resources

Customer Resource	Responsibilities
Platform Owner- Required	Responsible for the overall accountability of the ServiceNow platform. Provides leadership and oversight to the System Administrators, ensures team alignment to business strategy and the ServiceNow roadmap, and is actively involved in the overarching governance of the platform.
System Administrators- Required	Maintains the stability and usability of the ServiceNow platform by performing application maintenance, managing support for cases related to ServiceNow applications, and contributing to ServiceNow software releases by delivering configuration tasks and features.
Enterprise Architects- Recommended	Provides a holistic view of the organization's strategy, processes, and other systems, including any necessary policy or organizational requirements. Helps guide the Platform Owner to align with technical or functional standards.
Developers- Recommended	Writes code for the ServiceNow platform.

Requested Information / Access

Prior to beginning the Accelerator, you must provide your consent for the ServiceNow systems to scan your instance. You are prompted for consent when you submit your Health Assessment Accelerator request.

We request for you to complete an information gathering questionnaire, including requests for the following:

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- Identify the ServiceNow non-production instance to be scanned.
  - When you submit your Accelerator request in Impact, you're prompted to provide a candidate instance to run the HealthScan scan.
  - An instance close to production, or optimally, a recent clone of the production instance is recommended.
- Provide your ServiceNow environment information, such as upgrades planned, clones scheduled, and code release schedules.

Customer agreements and terms

For customer agreements and terms, refer to the applicable Impact Accelerator description available at#https://www.servicenow.com/legal/servicenow-impact.html.

Exclusions

- This Impact Accelerator is not available to:
  - Managed service providers, except for their internal use
  - Customers requiring security clearance
  - Customers operating a domain-separated environment.
- Certain Impact Accelerator activities may be limited or unavailable for customers in certain restricted environments or to self-hosted customers.
- Certain Impact Accelerator activities will not be available to:
  - Customers not hosted in a ServiceNow datacenter.
  - Customers that will not allow execution of a HealthScan scan on their instance.
- This Accelerator does not include:
  - Reviews of design, process, strategy, or governance.
  - The implementation of recommended changes.
  - Any configuration changes within the customer's sub-production or production instances.
- Health Assessment is a platform-wide review and excludes application specific reviews.

For Customer Agreements and Terms, refer to the applicable Impact Accelerator Description available at https://www.servicenow.com/legal/servicenow-impact.html

Integration Strategy

Guidance on the integration process

Integration Strategy- Advanced

This Accelerator provides guidance on the integration process.

Overview

Integration Strategy- Advanced provides Impact Customers with leading practices content and advisory guidance on#the#integration#process, including#design considerations, and platform recommended tools as they relate to the ServiceNow Platform.

What You Get

Introductory Customer Session (up to 60 min)

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- Set expectations on process and depth of deliverable
- Communicate expectation for Customer participation
- Request completion of intake questionnaire, maturity self-assessment, and provide any other requested inputs.

Customer Current State Working Session (up to 90 mins)

- Review customer intake and self-assessment
- Discuss current state of Customer's integrations

Customer Review Session (up to 120 mins)

- Review leading practices content
- Present Integration Strategy recommendations
- Discuss possible next steps for execution / measurement

Integration Strategy Deliverables

- Integration Strategy Maturity Self-assessment
- Workshop slides
- Action planning notes
- Action planning templates

Follow-Up Customer Session (optional upon Customer request - up to 60 min)

- Opportunity for Q&A related to integration strategy
- Provide additional guidance on leading practices

Requested Customer Resources

Customer resource and responsibilities

Customer Resource	Responsibilities
Platform Owner- Required	Responsible for the overall accountability of the ServiceNow platform. Provides leadership and oversight to the System Administrators, ensures team alignment to business strategy and the ServiceNow roadmap, and is actively involved in the overarching governance of the platform
Platform Administrator- Required	Responsible for the day-to-day administration of ServiceNow platform.
ServiceNow Platform Architect- Required	Responsible for Customer's ServiceNow architecture, planning integration, and designing integration architectures; actively involved in the overarching governance of Customer's ServiceNow Platform.
Enterprise Architect Lead- Required	Responsible for overall enterprise architecture, strategy, and governance.
Data Owners- Recommended	Responsible for data related to an integration.

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Requested Information / Access

- Existing Integration Strategy Document(s)
- Enterprise Architecture Concept of Operations or Program Overview document
- Summary listing of integrations
- Example documents: Architectural diagram(s), Business process flow model(s), Data model(s), data flow diagram(s).
- Platform Change Management Concept of Operations or Program Overview document
- CSDM Foundation Data – summary of tables integrated with external systems, and any customizations related to the Foundation Data tables

Exceptions

ServiceNow is not responsible for execution of Customer's integration strategy.

Integration Strategy- Total

Guidance on the integration process

Overview

Integration Strategy – Total provides Total Impact Customers with leading practices, content, and prescriptive guidance on the integration strategy, including leading practices and design considerations as they relate to the ServiceNow AI Platform.

What You Get

Introductory Customer Session (up to 60 min)

- Set expectations on process and depth of deliverable
- Select Offering (Customer may select one Offering within one opportunity, see table below)
- Communicate expectation for customer participation
- Request data and other inputs

Opportunity	Offering
Enterprise Architecture How could ServiceNow serve Customer's enterprise architecture?	Assess both ServiceNow AI Platform and Enterprise Architecture landscape to seek value opportunities for Strategic Integrations
	Review data flows for key processes to understand where opportunities could live for untapped efficiencies and/or better source integration
	Review current and future states to help form a strategic direction that prescribes steps to get from here to there
ServiceNow AI Platform Integration	Assess ServiceNow AI Platform to understand where current state

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Opportunity	Offering
Based on Customer's current and planned states, how could integrations enhance the planned value gained from ServiceNow?	integrations are in place and where there are gaps that could be automated
	Assess state of Foundational Data with recommendations for alignment with leading practices
	Assess current state Data Security policies and standards with recommendations for alignment with leading practices
Customer Request How can ServiceNow help Customer reach optimal value through a specific focus area?	Assess approach for converting an existing integration back to core platform capabilities
	Assess approach for migrating an integration from one vendor to another
	Assess the impact of new release capabilities on an existing integration

Customer Discovery Working Session (up to 90 minutes)

- Review Customer-provided data/inputs
- Discuss current state of Customer's integrations
- Schedule date for Scope Definition Working Session

Customer Scope Definition Working Session (up to 120 minutes)

- Review guiding principles
- Review Key Questions
- Define scope in reference to Customer's current architecture and current state

Customer Review Session (up to 90 minutes)

- Present final Integration Strategy recommendations
- Discuss possible next steps for execution / measurement

Integration Strategy Deliverables

- Workshop slides
- Action planning notes

Follow-up Customer Session (optional upon Customer request- up to 60 minutes)

- Opportunity for Q&A related to integration strategy
- Provide additional guidance on leading practices

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Requested Customer Resources

Customer resource and responsibilities

Customer Resource	Responsibilities
Platform Owner- Required	Responsible for the overall accountability of the ServiceNow platform. Provides leadership and oversight to the System Administrators, ensures team alignment to business strategy and the ServiceNow roadmap, and is actively involved in the overarching governance of the platform
Executive Sponsor- Required	Primary strategic contact for ServiceNow
Platform Administrator- Required	Responsible for the day-to-day administration of ServiceNow platform
ServiceNow AI Platform Architect- Required	Responsible for Customer's ServiceNow architecture, planning integration, and designing integration architectures; actively involved in the overarching governance of Customer's ServiceNow AI Platform
Enterprise Architect Lead- Required	Responsible for overall enterprise architecture, strategy, and governance
integration Owners- Required	Responsible for integrating systems – data, processes, process automation
Sr. Functional Service Owners- Required	As related to the Accelerator's scope – responsible for the service(s) that may be integrating with ServiceNow
Sr. Functional Business Owners- Required	As related to the Accelerator's scope – responsible for the business(es) that may be integrating with ServiceNow

Requested Information / Access

- MID Server architecture documentation (if applicable)
- Customer may be asked to grant the ServiceNow Impact Squad access to Customer's instance for the purposes of providing the Impact Accelerator during the period of performance
- Platform Information
  - Platform Implementation Date / Version
  - Work flows Implemented (e.g., IT, Customer, Employee)
  - Application Families implemented
  - Current implementations
- Enterprise Architecture
  - Organization chart
  - Architecture diagram(s)
  - Network Map(s) / Diagram(s)
  - Integration Map(s)

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- Business Process Flow Model(s)
- Data Model(s)
- Data Flow Diagram(s)
- Data security & Compliance standards
- Authentication and authorization standards/process

- Enterprise Architecture Inventory intake (spreadsheet will be provided to Customer; may be substituted with document with similar information)
- Foundation Data Inventory intake (spreadsheet will be provided to customer; may be substituted with document with similar information)

Exceptions

This Accelerator does not include technical troubleshooting of existing integrations, code reviews, technical break/fix, or technical performance improvements.

ServiceNow is not responsible for execution or measurement of Customer's integration strategy.

Multi-instance Topologies

This Accelerator provides education on drivers and topology alternatives to support multiple production instance implementations delivered within the context of a single-customer production implementation.

Overview

The Multi-instance Topologies Accelerator provides Impact customers with facilitated education sessions that establish a foundational understanding of the common business drivers that could warrant multiple production instances and an introduction to four multi-instance topology alternatives.

The overview for each topology includes a description, topology-related use cases, strengths and weaknesses, and example process flows. The education sessions are interspersed with interactive use case activities, so that following the completion of the Accelerator, you may continue to evaluate your own multi-instance requirements by engaging your implementation provider to develop an implementation architecture.

Note: This Accelerator is available in Advanced and Total packages.

What You Get

Introductory Customer Session (up to 60 minutes)

- Introduce Accelerator and set expectations on process and depth of deliverable
- Communicate expectation for Customer participation
- Introduce business drivers for multiple production instances
- Introduce four multi-instance topologies
- Request completion of intake questionnaire, three use cases, and provide any other requested inputs

Customer Education Session #1 (up to 120 minutes)

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- Present business drivers for multiple production instances, referencing use cases provided by the customer
- Present two multi-instance topologies
- Conduct interactive activities based on relevant customer-provided use cases

Customer Education Session #2 (up to 120 minutes)

- Present two multi-instance topologies, which may or may not reference the customer's use cases
- Conduct interactive activities based on relevant customer-provided use cases
- Advisory guidance for next steps

Follow-up Customer Session (optional upon Customer request - up to 60 minutes)

Opportunity for Q&A related to the multi-instance topologies education and guidance

Multi-instance Topologies Deliverables

- Workshop slides
- Multi-instance topology use case activities
- Guidance for next steps

Requested customer resources

Customer resource and responsibilities

Customer Resource	Responsibilities
Platform Owner (Required)	Responsible for the overall accountability of the ServiceNow platform. Provides leadership and oversight to the System Administrators, ensures team alignment to business strategy and the ServiceNow roadmap, and is actively involved in the overarching governance of the platform.
Platform Administrator (Required)	Responsible for the day-to-day administration of the ServiceNow platform.
ServiceNow Platform Architect (Required)	Responsible for overall ServiceNow platform architecture, strategy, and governance.
Enterprise Architect(s) (Required)	Provides a holistic view of the organization's strategy, processes, and other systems, including any necessary policy or organizational requirements. Helps guide the Platform Owner to align with technical or functional standards.
Service Owner(s) (Recommended)	Responsible for data and process flows related to a specific service, process, or an integration.

Pre-requisite

The completion of the workshop, *How to Tackle Architectural Implementation Models*, is required. For more information, contact your Enterprise Architect.

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Requested Information Access

The output deliverables from the *How to Tackle Architectural Implementation Models* workshop are requested.

Exceptions

- Multi-instance topology architecture design recommendations
- Multi-instance technical implementation / technical integration detailed architecture
- Enterprise architecture review
- Detailed architecture blueprint for multi-instance configuration
- How to integrate multiple production instances
- Topology considerations for Managed Service Provider and/or multiple customer multi-instance configurations
- Multiple sub-production instances, for example, development, test, or user acceptance test (UAT))

Release and Deployment Advisory for Pro-code Development

The Release and Deployment Advisory for Pro-code Development Accelerator provides guidance to assist pro-code developers in tools and techniques to release and deploy ServiceNow application configurations and customizations.

Accelerator overview

This Accelerator provides you with a review and guidance on your release and deployment processes and methods for a selected set of#applications including either ServiceNow sourced applications or custom-developed applications. Your Impact Squad provides guidance based on your responses to an intake questionnaire and a collaborative Discovery working session that reviews your current state for two selected applications.

Note: This Accelerator is available in Advanced and Total packages.

What you get

Important: Your Squad will request that you complete a provided intake questionnaire in preparation for the Introduction Session as part of the Accelerator initiation.

The Accelerator activities are led by your Platform Architect (PA).

Introductory customer session (up to 180 minutes)

- Review the initiative approach and your objectives
- Establish clear expectations regarding the process and your participation, along with the level of detail for the deliverables
- Review the basics of the release and deployment methods including update sets and ServiceNow Studio used with Application Repository
- Confirm the selected applications

Customer current state working session (up to 180 minutes)

Discuss the current state of your release and deployment methods for a select set of applications

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Customer recommendation session (up to 120 minutes)

- Review leading practices related to release and deployment
- Review and discuss your tailored recommendations to enable you to more effectively release and deploy your applications
- Discuss the possible next steps to implement the recommendations and techniques to measure the results of your improvements

Follow-up customer session (optional upon customer request - up to 60 minutes)

Opportunity for Q & A related to the release and deployment guidance

Release and Deployment Advisory deliverables

- Workshop slides
- Guidance to improve your release and deployment processes
- Recommended next steps

Requested customer resources

One or more customer resources are requested. The specific number of resources provided is Accelerator and customer specific.

Customer resource and responsibilities matrix

Customer resource	Responsibilities	Required	Optional
Application Owners	• Responsible for ensuring that an application meets its intended purpose and adds value to the business. • Guide the software development lifecycle (SDLC) to improve performance and align with the business's goals.		X
Enterprise Architect	• Drives strategic investment decisions by understanding Business capabilities. • The EA creates a single language between people, processes, and technology that allows your teams to seamlessly share and enrich data across business functions. You can also consult the EA when you define your development management policies, but if you don’t, make sure you at least inform them of this work.		X
Lead Developers	Oversees development, development tools and development processes for one or more applications.	X	
Master Services Provider / Vendor Lead	Customer’s third-party development partner involved in design and/or development of applications and/or services.		X

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Customer resource and responsibilities matrix (continued)

Customer resource	Responsibilities	Required	Optional
Platform Administrator	• Responsible for day-to-day administration & maintenance, including configuration and support, and understands the end-to-end development release process flow. • Executes configuration, release and deployment actions	X	
Platform Owner	• Owns the platform, creates roadmap to align with strategy, oversees governance. • The platform owner is typically accountable for managing the creation of all development management policies.	X	
Quality Assurance Lead	Focuses on validating that the platform and applications function per acceptance criteria.		X
Release Manager	Oversees the overall release process from development instance(s) to intermediate sub-production instance(s) to production instance.	X	
Security Administrator	• Responsible for installing, administering, troubleshooting security capabilities and configuration that complies with Technical Governance guidance. Promotes adherence to security policies and procedures. • Consulted when the development management policies are created to confirm that the development guidelines appropriately safeguard against unnecessary risk.		X
ServiceNow AI Platform Architect	Responsible for the creation of development management policies while consulting members of the organization, including enterprise architects, security administrators, and development leads/SMEs, ServiceNow architects, and process owners.	X	
Technical Governance Board Lead	Leads the technical governance board that establishes policies and procedures for data, security, development, change, and release		X

Requested information / access

Customers must provide the following supporting information:

- Intake Questionnaire (to be provided by the ServiceNow team) completed by the customer at least one week prior to the Customer Working Session
- Current release and deployment process for selected applications

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- Impact materials, such as:
  - Customer Impact Plan
  - Architecture Blueprint Objectives and outcomes
  - Capabilities Map
  - Product Adoption Roadmap
  - Organization Chart related to selected applications
  - Stakeholder Map related to selected applications

Exceptions

This Accelerator does not include:

- Defining release process specifications
- Detailed release process analysisDetailed development guidance on ServiceNow Studio for application development
- Source Control release review – request
- Impact Expert Services advisory for further assistance
- App Engine Studio and App Engine Management Center (low-code development)
- Dev Ops – CI/CD, release automation
- Citizen Development
- Detailed review of technical governance processes for release and deployment

Technical Governance

Guidance on technical governance management of the ServiceNow AI Platform

Overview

Technical Governance provides Impact Customers with a framework that defines how to govern and manage the stability of the ServiceNow platform. This Impact Accelerator aims to assist Customers in establishing technical decision-making processes, and governance policies and processes that can facilitate faster implementations and upgrades, smoother development, and greater value from enhanced feature adoption.

Note: This Accelerator is available in Advanced and Total packages.

What you get

Introductory Customer Session (up to 60 min)

- Set expectations on process and depth of deliverable
- Communicate expectation for Customer participation
- Request data and any other inputs from Customer

Customer Workshop (up to 4 hrs)

- Review current state of technical decision making and governance
- Discuss leading practice content
- Propose action plan items for Customer to execute

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Technical Governance Deliverables

- Workshop slides
- Action planning notes
- Action planning templates

Follow-up Customer Session (optional upon Customer request – up to 60 min)

- Opportunity for Q&A related to Technical Governance Deliverables
- Provide additional guidance on leading practices

Requested customer resources

Customer resource and responsibilities

Customer Resource	Responsibilities
Platform Owner - Required	Responsible for the overall accountability of the ServiceNow platform. Provides leadership and oversight to the System Administrators, ensures team alignment to business strategy and the ServiceNow roadmap, and is actively involved in the overarching governance of the platform.
Platform Architect	Provides a holistic view of the ServiceNnow platform, processes, and other systems, including any necessary policy or organizational requirements.
Executive Sponsor	Primary strategic contact for ServiceNow

Requested information/access

- ServiceNow governance structure documents – charters, board participant lists, etc.
- Strategy Governance, Portfolio Governance, and Architecture Blueprint Impact Accelerators are prerequisites for Technical Governance Accelerator CoE Charter
- Organization chart
- IT governance documents
- Current state architecture blueprint
- Platform team roles & responsibilities
- Technical policy documentation (e.g. platform management policies, integrations overview, cloning process, SLAs)

Exceptions

ServiceNow is not responsible for development or execution of the technical governance process or policy.

UX: Catalog Request Experience Review

This accelerator reviews the Impact customer's Service Catalog, request forms#and form#design and identifies areas#of improvement.

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Accelerator overview

UX: Catalog Request Experience Review provides Impact customers with an assessment of the user experience of up to four catalog request forms. Through careful review, we offer valuable insights and recommendations to enhance the design and effectiveness of their forms. Additionally, this accelerator equips our customers with essential ServiceNow resources and leading practices guides on how to improve the usability of their Service Catalog.

Note: This Accelerator is available for Impact Guided+ (Platform Governance), Advanced and Total Packages.

What you get

Session Preparation

- Provision a temporary instance
- UX review of up to four catalog request forms selected by customer

Customer Coaching Session #1 (up to 1.5 hours)

Includes the following activities:

- Review scope and expectations of the accelerator and confirm customer needs
- Outline the importance of well-defined forms and catalogs
- Discuss recommendations based on the review of catalog request forms selected by customer

Customer Coaching Session #2 (Optional Upon Recommendation-up to 1 hour)

- Continue discussion of catalog request form recommendations, if needed
- Opportunity for Q&A related to recommendations

Outputs

- Service Catalog UX Review Readout Deck
- Documentation of recommendations

Requested customer resources

One or more customer resources are requested. The specific number of resources provided is Accelerator and customer specific.

Customer resource and responsibilities

Customer resource	Responsibilities	Required	Optional
Product owner	Subject matter expert responsible for managing customer's ServiceNow Service Catalog.	#	
UX & OCM Expert	Primary stakeholders and advocates for user experience and organizational change management.		#
Process/Service Owner(s)	A senior leader within each business unit for each major process or service (e.g., incident, change, employee		#

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Customer resource and responsibilities (continued)

Customer resource	Responsibilities	Required	Optional
	onboarding) who is accountable for ensuring the process is fit for purpose.		
Developer(s)	Writes code for the ServiceNow platform		#
Trusted Service Partners	Attends ServiceNow Impact accelerator coaching session(s) to understand leading practices and potentially support customer going forward.		#

Requested Information/Access

- Identification of up to four catalog request forms for review
- Existing user research and feedback on Service Catalog, plus relevant insights

Requested Information/Access

Note: Additional details on supplemental legal terms, prerequisites, specifications, requirements, and exclusions can be found in the Impact Accelerator Terms Matrix.

UX: Design for Employee Center

The UX (User Experience): Design for Employee Center Accelerator provides UX Design support and guidance to help customers get started with Employee Center design.

Accelerator overview

UX: Design for Employee Center provides Impact customers with tailored advice on designing the user experience of their Employee Center. We offer valuable insights and recommendations to enhance the usability and effectiveness of their implementation. Additionally, this accelerator equips our customers with essential ServiceNow resources and leading practices guides on how to improve the user experience of their Employee Center. For additional information, see Employee Center.

Note: This Accelerator is available for Impact Guided+ (Platform Governance), Advanced and Total Packages.

What you get

Session Preparation

- Provision a temporary instance
- UX review of existing employee portal and related content

Customer coaching session #1 (up to 1.5 hours)

Includes the following activities:

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- Review of the scope and expectations of the accelerator and confirmation of customer needs
- Outline of the importance and value of considering the needs, goals, and feedback of users when setting up Employee Center
- Walk through a demo of the base system Employee Center features and capabilities, highlighting design recommendations curated to customer

Customer coaching session #2 (optional upon consultant recommendation, up to 1 hour)

- Continue discussion of recommendations for Employee Center design, if needed
- Opportunity for Q&A related to recommendations

Outputs

- Recommendations Readout Deck
- UX resource Guide

Requested customer resources

One or more customer resource is requested. The specific number of resources provided is Accelerator and customer specific.

Customer resource and responsibilities

Customer resource	Responsibilities	Required	Recommended
Product owner	Manages customer's#Employee Center.	#	
UX & OCM Expert	Primary stakeholders and advocates for user experience and organizational change management.	#	
Process/Service Owner(s)	A senior leader within each business unit for each major process or service (Example: incident, change, employee onboarding) who is accountable for ensuring the process is fit for purpose.		#
Developer(s)	Writes code for the ServiceNow platform		#
Trusted Service Partners	Attends ServiceNow Impact Accelerator coaching session(s) to understand leading practices and potentially support customer going forward.		#

Requested Information/Access

- Goals for base Employee Center implementation
- Background on journey to Employee Center
- Existing user research and feedback, plus relevant insights

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Requested Information/Access

Note: Additional details on supplemental legal terms, prerequisites, specifications, requirements, and exclusions can be found in the Impact Accelerator Terms Matrix.

UX: Portal Experience Review

This accelerator evaluates the UX of a customer's ServiceNow portal, focusing on usability, design, and leading practices to enhance overall user experience and engagement.

Accelerator overview

UX: Portal Experience Review provides Impact customers with an assessment of the user experience of their ServiceNow portal implementation. Through careful review against ServiceNow leading practices, we identify UX issues and provide actionable recommendations to improve design, enhance user satisfaction, and increase portal adoption and efficiency.

Note: This Accelerator is available for Impact Guided+ (Platform Governance), Advanced and Total Packages.

What you get

Session preparation

- Provision a temporary instance
- Review customer's portal to uncover UX insights and identify actionable recommendations

Customer Coaching Session #1 (up to 1.5 hours)

Includes the following activities:

- Review scope and expectations of the Accelerator and confirm customer needs.
- Discuss findings from the Employee Center portal evaluation, along with initial improvement recommendations.

Customer Coaching Session #2 (Optional Upon Recommendation-up to 1 hour)

- Continue discussion of current portal experience recommendations, if needed
- Opportunity for Q&A related to recommendations

Outputs

- Assessment Findings
- Recommendation Readout Deck

Requested customer resources

One or more customer resources are requested.The specific number of resources provided is Accelerator and customer specific.

Customer resource and responsibilities

Customer resource	Responsibilities	Required	Optional
Product owner	Manages Customer's#ServiceNow #Service Catalog.	#	

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Customer resource and responsibilities (continued)

Customer resource	Responsibilities	Required	Optional
UX & OCM Expert	Primary stakeholders and advocates for user experience and organizational change management.		#
Trusted Service Partners	Attends ServiceNow Impact Accelerator coaching session(s) to understand leading practices and potentially support customer going forward.		#

Requested Information/Access

- Customer goals and UX pain points for portal to be reviewed
- Existing user research and feedback on current portal, plus relevant insights

Requested Information/Access

Note: Additional details on supplemental legal terms, prerequisites, specifications, requirements, and exclusions can be found in the Impact Accelerator Terms Matrix.

UX: Taxonomy Design or Review

This Accelerator provides Impact customers with guidance to optimize the content structure and navigation of their portal, focusing on categorizing knowledge and catalog content to improve usability and make information easier to find.

Accelerator Overview

UX: Taxonomy Design or Review provides Impact customers with guidance to enhance their portal navigation and content structure to improve usability of their portal and findability of knowledge and catalog content. Additionally, this accelerator equips our customers with essential ServiceNow resources and leading practices guides to self-enable them to develop and refine their portal taxonomy.

Note: This Accelerator is available for Impact Guided+ (Platform Governance), Advanced and Total Packages.

What you get

Session Preparation

- Provision a temporary instance
- Review customer's portal taxonomy to uncover current state insights and identify actionable recommendations
- Review past user research and feedback, plus relevant insights and analytics

Customer Coaching Session #1 (up to 1.5 hours)

During this session, UX consultants cover the following depending on where customers are in their implementation journey:

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- Review scope and expectations of the accelerator and confirm customer needs
- Discuss findings from the current portal taxonomy evaluation, along with initial improvement recommendations
- Present base system taxonomy models or an initial draft of the taxonomy

Customer Coaching Session #2 (Optional Upon Recommendation - up to 1 hour)

- Continue discussion of taxonomy recommendations, if needed
- Opportunity for Q&A related to recommendations

Outputs

- Taxonomy findings
- Recommendation readout deck

Requested customer resources

One or more customer resources are requested. The specific number of resources provided is Accelerator and customer specific.

Requested customer resources and responsibilities

Customer Resource	Responsibilities	Required	Recommended
Product Owner	Manages Customer's #ServiceNow# portal.	#	
UX & OCM Expert	Primary stakeholders and advocates for user experience and organizational change management.		#
Process/Service Owner(s)	A senior leader within each business unit for each major process or service (for example, incident, change, employee onboarding) who is accountable for ensuring the process is fit for purpose.		#
Developer(s)	Writes code for the ServiceNow platform		#
Trusted Service Partner(s)	Attends ServiceNow Impact accelerator coaching session(s) to understand leading practices and potentially support customer going forward.		#

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Requested Information/Access

- Goals and pain points customer has identified on information architecture and taxonomy
- Content inventory of existing taxonomy
- Existing user research and feedback on current taxonomy, plus relevant insights, KPIs, and analytics

Requested Information/Access

Note: Additional details on supplemental legal terms, prerequisites, specifications, requirements, and exclusions can be found in the Impact Accelerator Terms Matrix.

UX: Why It Matters and How to Apply It

This accelerator takes examples directly from the Impact customer's instance to develop their understanding of UX and demonstrate how investing in UX directly influences the success of their ServiceNow investment.

Accelerator overview

UX: Why It Matters and How to Apply It helps Impact customers develop the foundational skills to start considering the needs of their users as part of their ongoing ServiceNow implementation process. By developing this capability and mindset, customers can unlock the full potential of the platform, improve productivity, enhance user satisfaction, and boost operational efficiency.

Note: This Accelerator is available for Impact Guided+ (Platform Governance), Advanced and Total Packages.

What you get

Session Preparation

- Provision a temporary instance
- Review customer's implemented experience to gain deeper insights of the UX

Customer Coaching Session #1 (up to 1.5 hours)

Includes the following activities:

- Review scope and expectations of the accelerator and confirm customer's UX goals and maturity level
- Outline the importance of considering user needs, goals, and feedback when implementing ServiceNow products
- Present UX concepts, terms, and examples from customer instance to demonstrate how UX can improve multiple areas of their ServiceNow AI Platform

Customer Coaching Session #2 (Optional Upon Recommendation-up to 1 hour)

- Continue discussion of UX concepts and opportunities, if needed
- Opportunity for Q&A related to developing UX practice

Outputs

Content covered in the UX presentation

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Requested customer resources

One or more customer resources are requested. The specific number of resources provided is Accelerator and customer specific.

Customer resource and responsibilities

Customer resource	Responsibilities	Required	Optional
Product Owner	Manages Customer's#ServiceNow#Service Portal.	#	
UX & OCM expert	Primary stakeholders and advocates for user experience and organizational change management.		#
Process/Service Owner(s)	A senior leader within each business unit for each major process or service (Example: incident, change, employee onboarding) who is accountable for ensuring the process is fit for purpose.		#
Developer(s)	Writes code for the ServiceNow platform		#
Trusted Service Partner(s)	Attends ServiceNow Impact accelerator coaching session(s) to understand leading practices and potentially support customer going forward.		#

Requested Information/Access

- Assessment of customer's UX maturity
- Description of common user profiles
- Overview of customer's intended goals and motivations for prioritizing user experience

Requested Information/Access

Note: Additional details on supplemental legal terms, prerequisites, specifications, requirements, and exclusions can be found in the Impact Accelerator Terms Matrix.

Strategy Accelerators

Use Strategy Accelerators to go deeper on organizational and governance best practices with the ServiceNow platform and upskill your team to maintain business performance and drive success.

Accelerators available in each package

Accelerator outputs and formats have common standardized features, but may differ from package to package. Not all Accelerators are available for each package. The Accelerators and available feature levels are denoted by these symbols:

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- ✓ = Common standardized feature set
-  = Includes unique accelerator-specific features
-  = Includes additional unique accelerator-specific features

Strategy Accelerator sub-catalog

Accelerator	Guided package	Guided +Strategic Value	Advanced package	Total package	Restricted and protected environments
Center of Excellence & Innovation Design		#	#		
Center of Excellence and Innovation Maturity Assessment Accelerator		#	#	#	
Champion Engagement		#	#		
Citizen Development Program Design		#	#	#	
CoEI Influencing Funding Strategy		#	#	#	
CSM - Maturity Assessment		#	#	#	
Develop Partner Strategy		#	#		
Foundations of AI Governance		#	#	#	
HRSD Maturity Assessment		#	#	#	
IRM Maturity Assessment		#	#	#	
ITOM Maturity Assessment		#	#	#	
ITSM Maturity Assessment		#	#	#	
LSD Maturity Assessment		#	#	#	
On-Demand Value Report	#	*	*	*	
Portfolio Governance		#	#	#	
PPM Maturity Assessment		#	#	#	
ServiceNow Governance				#	
SAM Maturity Assessment		#	#	#	

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Strategy Accelerator sub-catalog (continued)

Accelerator	Guided package	Guided +Strategic Value	Advanced package	Total package	Restricted and protected environments
Staffing and Roles Review		#	#	✓	
Stakeholder Path to Value		#	#	#	
Strategy Governance		#	#	#	
Success Readiness Assessment (SRA)		#	#	#	
Value Potential		#	#	#	
Vision and Strategy		#	#	#	

Center of Excellence & Innovation Design

The Center of Excellence and Innovation Design (CoEI) Accelerator provides guidance on building your ServiceNow CoEI.

Accelerator overview

Center of Excellence & Innovation (CoEI) Design provides Impact customers with leading practices content and prescriptive guidance and support to build a CoEI within their organization. This Accelerator aims to help customers use a CoEI as a vehicle to realize and accelerate the value they receive from their ServiceNow platform.

Note: This Accelerator is available for Impact Advanced and Total packages.

What You Get

Introductory customer session (up to 60 minutes)

- Set expectations on process and depth of deliverable
- Explain the concept of a ServiceNow CoEI and its importance
- Share resources and assign readings
- Communicate expectations for customer participation
- Request data and any other inputs
- Set up a plan for assessment

Customer discovery sessions workshops (up to 12 hours)

- Review how the current CoEI organization structure meets your needs
- Assist in identifying potential gaps in the current CoEI organization structure
- Develop a recommended CoEI organizational structure

CoEI diagram

Diagram of the recommended CoEI organizational structure

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Customer review session (up to 60 minutes)

- Review the CoEI diagram deliverable
- Review recommended functional roles and responsibilities

Implementation plan workshop (up to 2 hours)

- Co-develop a plan to implement the recommended CoEI structure
- Outline of resources and risks
- Assistance with measuring the progress and effectiveness of the plan

Requested customer resources

One or more customer resources are requested. The specific number of resources provided is Accelerator and customer specific.

Customer resource and responsibilities

Customer Resource	Responsibilities
Platform owner (Required)	Responsible for the overall accountability of the ServiceNow platform. Provides leadership and oversight to the System Administrators, ensures team alignment to business strategy and the ServiceNow roadmap, and is actively involved in the overarching governance of the platform.
Executive sponsor (Required)	Primary strategic contact for ServiceNow.
Process owner (Required)	Owns the process being reviewed.

Requested Information / Access

- Organizational chart and roles and responsibilities
- RACI diagrams
- Charter and/or guiding principles document

Exceptions

ServiceNow resources are not responsible for implementation or management of the ServiceNow CoEI.

Center of Excellence and Innovation Maturity Assessment Accelerator

This accelerator assesses your current ServiceNow #CoEI processes and functional maturity within ServiceNow, providing targeted recommendations on next steps to unlock additional value from the platform

Accelerator Overview

Center of Excellence and Innovation (CoEI) Maturity Assessment provides Impact customers with prescriptive recommendations based on a structured assessment conducted by key stakeholders within the customer's business. By offering customers a snapshot of their current process maturity and targeted next-step recommendations, this accelerator helps maximize the value of their ServiceNow investment.

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Note: This Accelerator is available for Impact Guided+ (Strategic Value add-on), Advanced and Total Packages.

What You Get

Maturity Assessment kick-off session (up to 1.5 hours)

- Set expectations on the process and depth of deliverable
- Communicate expectations for customer participation
- Request data and any other inputs

CoEI Maturity Assessment questionnaire

Your assessment participants will each be asked to independently fill out a pre-built CoEI Maturity Assessment Questionnaire that asks them to grade targeted statements that assess gaps and opportunities with your CoEI deployment.

Questionnaire results analysis (time as determined per Impact Squad)

The Impact Squad performs the following:

- Reviews and analyzes the questionnaire scores
- Compiles targeted recommendations and leading practices
- Provides guidance that will help you understand how to best maximize your CoEI investment

CoEI Maturity Assessment report

The assessment report is compiled from the responses to the questionnaire and includes the following:

- Maturity score
- The top five recommendations grounded in ServiceNow leading practices
- Content, accelerators, and next steps where applicable
- A complete list of recommendations observed

Customer read-out session (up to 1.5 hours)

- Deliver CoEI Maturity Assessment report
- Review CoEI Maturity Assessment report
  - Present the assessment results
  - Discuss targeted recommendations
  - Provide a suggested plan and resources to help you decide which recommendations to implement

Follow-up customer session (optional on Customer request– up to 1 hour)

- Review Customer progress
- Identify additional resources to achieve Customer goals
- Provide additional guidance on leading practices

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Requested customer resources

One or more customer resources are requested. The specific number of resources provided is Accelerator and customer specific.

Customer resource and responsibilities

Customer Resource	Responsibilities		
Main Customer Contact, PMO	Primary contact for the duration of the engagement and carries out the following responsibilities: • Gather and share the list of assessment participants. • Ensure completion of the assessment by participants. • Provide sponsorship for outputs based on the recommendations.	#	
Assessment Participants	People within your organization who complete the assessment. Their responsibilities are: • Complete the assessment by the agreed deadline. • Raise any questions or concerns as soon as possible.	#	
Process Owner	Owns the process being assessed.	#	

Requested Information / Access

We request that the CoEI Maturity questionnaire is completed by the customer virtually at least two weeks prior to the customer readout session.

Exclusions

- This Impact Accelerator does not include a technical review of CoEI.
- Assessment of capabilities and processes beyond CoEI is not included.
- ServiceNow is not responsible for implementing the recommendations made based on the CoEI Maturity Assessment.

Champion Engagement

The Champion Engagement Accelerators provide insights into champion engagement.

Champion Engagement – Advanced

Guidance to effectively communicate the value and benefits of using the ServiceNow platform.

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Overview

Champion Engagement provides Impact Customer champions with leading practices content and prescriptive guidance to effectively#communicate the value proposition and benefits for using the ServiceNow platform within their organizations. Champion Engagement includes enablement for one champion.

What You Get

Introductory Customer Session (up to 60 min)

- Set expectations on process and depth of Champion Engagement Deliverable
- Communicate expectation for Customer participation
- Request data and any other inputs from Customer related to champion activity

Customer Working Session (up to 5 hours)

Customer meetings to discuss:

- Current champion activity
- Champion activity options
- Finalizing a Champion Plan

Champion Engagement Deliverable

Documented Champion Plan that defines what the Champion can participate in and accomplish (internally at their organization and externally) within the next year.

Follow-up Customer Session (optional upon Customer request - up to 60 min)

- Opportunity for Q&A related to Champion Plan
- Provide additional guidance on champion activity

Requested Customer Resources

Customer resource and responsibilities

Customer Resource	Responsibilities
Platform Owner- Required	Responsible for the overall accountability of the ServiceNow platform. Provides leadership and oversight to the System Administrators, ensures team alignment to business strategy and the ServiceNow roadmap, and is actively involved in the overarching governance of the platform.
Executive Sponsor - Required	Primary strategic contact for ServiceNow.

Requested Information / Access

- ServiceNow platform goals
- IT Strategic plan
- Pain points, business drivers, and desired business outcomes

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Exceptions

ServiceNow is not responsible for executing the Champion Plan.

Champion Engagement – Total

Guidance to effectively communicate the value and benefits of using the ServiceNow platform.

Overview

Champion Engagement provides Impact Customer champions with leading practices content and prescriptive guidance to effectively#communicate the value proposition and benefits for using the ServiceNow platform within their organizations. Champion Engagement includes enablement for three champions.

What You Get

Introductory Customer Session (up to 60 min)

- Set expectations on process and depth of Champion Engagement Deliverable
- Communicate expectation for Customer participation
- Request data and any other inputs from Customer related to champion activity

Customer Working Session (up to 5 hours)

Customer meetings to discuss:

- Current champion activity
- Champion activity options
- Finalizing a Champion Plan

Champion Engagement Deliverable

Documented Champion Plan that defines what the Champion can participate in and accomplish (internally at their organization and externally) within the next year.

Follow-up Customer Session (optional upon Customer request - up to 60 min)

- Opportunity for Q&A related to Champion Plan
- Provide additional guidance on champion activity

Requested Customer Resources

Customer resource and responsibilities

Customer Resource	Responsibilities
Platform Owner- Required	Responsible for the overall accountability of the ServiceNow platform. Provides leadership and oversight to the System Administrators, ensures team alignment to business strategy and the ServiceNow roadmap, and is actively involved in the overarching governance of the platform.
Executive Sponsor - Required	Primary strategic contact for ServiceNow.

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Requested Information / Access

- ServiceNow platform goals
- IT Strategic plan
- Pain points, business drivers, and desired business outcomes

Exceptions

ServiceNow is not responsible for executing the Champion Plan.

Citizen Development Program Design

Provides prescriptive guidance on enabling Citizen Development for your ServiceNow platform.

Overview

The Citizen Development Program Design Accelerator provides Impact customers with prescriptive guidance to effectively#develop a Citizen Development Program for the ServiceNow platform. ServiceNow technology empowers non coders, known as Citizen Developers, to build new applications and workflows without having prior coding knowledge using low-code development.

This Accelerator includes workshops to assess and create a prioritized list of candidates for Citizen Development, determine the required screening and training for them, and assess operational and technical governance to identify any necessary adjustments.

For more information on the Citizen Development and low code development, see Exploring App Engine Studio.

Note: This Accelerator is available for Impact Advanced and Total packages.

What you get

Kickoff meeting

Workshop planning meeting

Citizen development workshop #1 - vision, plan, and focus

- Prioritized candidate list and potential use cases determined
- Value proposition
- Marketing and awareness messaging
- Recruitment plan
- Initial implementation timeline
- Develop an initial implementation timeline
- Conduct the Citizen Development adoption maturity questionnaire

Citizen development workshop #2 - enable and empower

Review the following:

- Training curriculum – ServiceNow and Customer allocations
- Support model and responsibilities
- Demand intake process

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Citizen development workshop #3 - establishing guardrails

- Instance architecture
- Design considerations and standards
- Developer security model
- App life cycle model
- Testing standards
- App review standard
- Additional toolkit resources

The readout deck and supporting Citizen Development assets are delivered to the Customer.

Requested customer resources

One or more customer resources are requested. The specific number of resources provided is Accelerator and customer specific.

Customer resource and responsibilities

Customer Resource	Responsibilities
Platform owner (Required)	Responsible for the overall accountability of the ServiceNow platform. Provides leadership and oversight to the System Administrators, ensures team alignment to business strategy and the ServiceNow roadmap, and is actively involved in the overarching governance of the platform.
Executive sponsor (Required)	Primary strategic contact for ServiceNow.
Platform architect (Required)	Provides a holistic view of the ServiceNow platform, processes, and other systems, including any necessary policy or organizational requirements.
Citizen development program owner	Manages all the Citizen Development program.

Prerequisites

The following are required prerequisites:

- Identification of key players
- ServiceNow platform owner required
- App Engine license and products installed and configured

Exceptions

This Impact Accelerator in its entirety or portions of the Impact Accelerator Activities may not be available to customers in the FedRAMP, NSC DOD IL5, or Australia IRAP-Protected data centers, to self-hosted customers, or in other restricted environments.

ServiceNow is not responsible setting up or for implementing App Engine' recommendations on Customer’s sub-production or production instances.

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CoEI Influencing Funding Strategy

The Center of Excellence & Innovation (CoEI) Funding Strategy Accelerator advises Impact customers on how to identify and develop a strategic CoEI Funding approach.

Accelerator overview

CoEI Funding Strategy Accelerator Accelerator provides Impact customers with leading practices content and prescriptive guidance and support to build a funding model within their organization. This Accelerator aims to help you use the CoEI Funding Strategy as a vehicle to realize and accelerate the value received from ServiceNow products.

Note: This Accelerator is available for Impact Advanced and Total packages.

What you get

Kickoff meeting (up to 60 minutes)

- Review scope and expectations of the Accelerator
- Overview of the customer responsibilities
- Recap and validation of goals and key information

Funding model overview and assessment (up to 180 minutes)

- Review different funding models
- Discuss benefits of different types of funding models
- Select the funding model framework for customization

Funding model customization workshop (up to 180 minutes)

Review the different activities needed to customize your selected model to successfully stand up your funding strategy

Recommendation readout (up to 60 minutes)

- Present customized funding model and supporting resources for you to implement
- Address additional questions
- Review how to use the tools provided in the handoff, such as cost tracking

Outputs

- Customized Funding Strategy, including an overview of the chosen funding model and budget allocation plan
- Customizable funding model templates and frameworks (Centralized, decentralized, and hybrid)
- Guiding principles to help evolve CoEI with growth (Governance, OCM) #prioritized
- Follow-up recommendation on other Impact Accelerators#elated to your funding strategy

Requested customer resources

One or more customer resource is requested. The specific number of resources provided is Accelerator and customer specific.

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Customer resource and responsibilities

Customer resource	Responsibilities	Required	Optional
Change leads	Manages the customer's ServiceNow change enablement program	#	
Communication leads	Drafts and publishes the customer's internal communications	#	
Compliance and audit officer	Responsible for compliance, risk management, and audit procedure	#	
Platform owner	• Responsible for the overall accountability of the ServiceNow platform • Provides leadership and oversight to the System Administrators • Ensures team alignment to business strategy and the ServiceNow roadmap, and is actively involved in the overarching governance of the platform. ,	#	
Process leads	Subject matter expert responsible for managing the applicable process	#	
Process or service owners	A senior leader within each business unit who is accountable for ensuring a process or service, such as incident, change, or employee onboarding, is fit for its purpose	#	
Process owners	• Owns one or more processes related to the service, or ancillary process • Defines process flow, for example ancillary processes such as, ITSM incident management, ITSM change management, HR employee onboarding, or customer service management requests	#	
Reporting leads	Meets with the ServiceNow Impact Accelerator consultant, provides access to the required resources, and drives the actions from the engagement	#	
Executive suite: CTO or CIO	Responsible for the overall ServiceNow roadmap		#
Platform administrator	Responsible for the day-to-day administration of ServiceNow platform		#
ServiceNow development lead	Leads development on the ServiceNow platform		#

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Customer resource and responsibilities (continued)

Customer resource	Responsibilities	Required	Optional
ServiceNow development team lead	Leads development on the ServiceNow platform		#
ServiceNow Platform Architect	Responsible for overall ServiceNow platform architecture, strategy, and governance		#
Subject matter experts (SMEs)	Subject matter experts (SMEs)		#
System Administrators	• Maintains the stability and usability of the ServiceNow platform • Performs application maintenance, manages support for cases related to ServiceNow applications • Contributes to ServiceNow software releases by delivering configuration tasks and features		#
Technical governance board lead	Leads the technical governance board that establishes policies and procedures for data, security, development, change, and release		#

Requested Information / Access

- Organizational chart and roles and responsibilities
- RACI diagrams
- Charter and/or guiding principles document

Exceptions

ServiceNow resources are not responsible for implementation or management of the ServiceNow CoEI.

CSM - Maturity Assessment

This accelerator assesses your current Customer Service Management (CSM) processes and functional maturity within ServiceNow, providing targeted recommendations on next steps to unlock additional value from the platform

Accelerator Overview

Customer Service Management (CSM) Maturity Assessment provides Impact customers with prescriptive recommendations based on a structured assessment conducted by key stakeholders within the customer's business. By offering customers a snapshot of their current process maturity and targeted next-step recommendations, this accelerator helps maximize the value of their ServiceNow investment.

Note: This Accelerator is available for Impact Guided+ (Strategic Value add-on), Advanced and Total Packages.

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What you get

CSM Maturity Assessment kick off session (up to 1.5 hours)

- Set expectations on the process and depth of deliverable
- Communicate expectations for customer participation
- Request data and any other inputs

CSM Maturity Assessment questionnaire

Your assessment participants will each be asked to independently fill out a pre-built CSM Maturity Assessment Questionnaire that asks them to grade targeted statements to assess gaps and opportunities with your CSM deployment.

Questionnaire results analysis (time as needed per Impact Squad)

The Impact squad performs the following:

- Reviews and analyzes the questionnaire scores
- Compiles tailored recommendations and leading practices
- Provides guidance that will help you understand how to best maximize your CSM investment

CSM Maturity Assessment report

The assessment report is compiled from the responses to the questionnaire and includes the following:

- Maturity score
- The top five recommendations grounded in ServiceNow leading practices
- Content, accelerators, and next steps where applicable
- A complete list of recommendations observed

Customer read-out session (up to 1.5 hours)

- Deliver CSM Maturity Assessment report
- Review CSM Maturity Assessment report:
  - Present the assessment results
  - Discuss targeted recommendations
  - Provide a suggested plan and resources to help you decide which recommendations to implement

Follow-up customer session (optional on Customer request– up to 1 hour)

- Review Customer progress
- Identify additional resources to achieve Customer goals
- Provide additional guidance on leading practices

Requested customer resources

One or more customer resources are requested. The specific number of resources provided is Accelerator and customer specific.

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Customer resource and responsibilities

Customer Resource	Responsibilities		
Main Customer Contact, PMO	Primary contact for the duration of the engagement and carries out the following responsibilities: • Gather and share the list of assessment participants. • Ensure completion of the assessment by participants. • Provide sponsorship for outputs based on the recommendations.	#	
Assessment Participants	People within your organization who complete the assessment. Their responsibilities are: • Complete the assessment by the agreed deadline. • Raise any questions or concerns as soon as possible.	#	
Process Owner	Owns the process being assessed.	#	

Requested Information / Access

We request that the CSM Maturity questionnaire is completed by the customer virtually at least two weeks prior to the customer readout session.

Exclusions

- This Impact Accelerator does not include a technical review of CSM.
- Assessment of other EWF capabilities beyond CSM is not included.
- ServiceNow is not responsible for implementing the recommendations made based on the CSM Maturity Assessment.

Develop Partner Strategy

The Develop Partner Strategy Accelerators provide guidance on finding and evaluating effective partners.

Develop Partner Strategy – Advanced

Guidance on finding and evaluating effective partners

Overview

Develop Partner Strategy provides Impact Customers with guidance to identify, and evaluate, a ServiceNow implementation partner that is aligned to their objectives and has the expertise needed to help them achieve the target outcome.

What You Get

Introductory Customer Session (up to 60 min)

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- Set expectations on process and depth of deliverable
- Communicate expectation for Customer participation
- Request data and any other inputs

Discovery Customer Sessions (up to 5 hours total)

Customer meetings to discuss:

- Existing partner performance
- Current partner needs
- Plan to assist customer in identifying and evaluating partners for a target outcome

Partner Strategy Deliverable

Documented recommendations to assist customer in identifying and evaluating partners for target outcome.

Follow-Up Customer Session (optional upon Customer request - up to 60 min)

- Opportunity for Q&A related to partner plan
- Provide additional guidance on leading practices

Requested Customer Resources

Customer resource and responsibilities

Customer Resource	Responsibilities
Platform Owner- Required	Responsible for the overall accountability of the ServiceNow platform. Provides leadership and oversight to the System Administrators, ensures team alignment to business strategy and the ServiceNow roadmap, and is actively involved in the overarching governance of the platform.
Executive Sponsor - Required	Primary strategic contact for ServiceNow.
Primary Executive Stakeholder – Required	Responsible for selecting and managing the partner.

Requested Information / Access

- Implementation roadmap(s)
- Existing partner relationship(s)
- Outstanding RFP(s) issued by Customer (Partner responses not to be shared with ServiceNow)

Exceptions

ServiceNow is not responsible for partner assessment, identification, selection, enablement, or management.

Develop Partner Strategy – Total

Guidance on finding and evaluating effective partners

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Overview

Develop Partner Strategy provides Impact Customers with guidance to identify, evaluate, and select a ServiceNow implementation partner that is aligned to their objectives and has the expertise needed to help them achieve value from their ServiceNow investment.

What You Get

Introductory Customer Session (up to 60 min)

- Set expectations on process and depth of deliverable
- Communicate expectation for Customer participation
- Request data and any other inputs

Discovery Customer Sessions (up to 10 hours total)

Customer meetings to discuss:

- Maturity of partner management function
- Existing partner performance
- Expectations for any new partner relationships
- Improving partner selection and management processes

Partner Strategy Deliverable

- Analysis readout on the current state of partner management function
- Documented recommendations on how to modify and/or improve partner selection and management processes

Follow-Up Customer Session (up to 20 hours total)

- Opportunity for Q&A related to partner strategy deliverable
- Offer guidance on Customer's partner management, as needed

Requested Customer Resources

Customer resource and responsibilities

Customer Resource	Responsibilities
Platform Owner- Required	Responsible for the overall accountability of the ServiceNow platform. Provides leadership and oversight to the System Administrators, ensures team alignment to business strategy and the ServiceNow roadmap, and is actively involved in the overarching governance of the platform.
Executive Sponsor - Required	Primary strategic contact for ServiceNow.
Primary Executive Stakeholder – Required	Responsible for selecting and managing the partner.

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Requested Information / Access

- Implementation roadmap(s)
- Existing partner relationship(s)
- Outstanding RFP(s) issued by Customer (Partner responses not to be shared with ServiceNow)

Exceptions

ServiceNow is not responsible for partner assessment, identification, selection, enablement, or management.

Foundations of AI Governance

This accelerator provides foundational guidance on establishing and managing an Artificial Intelligence Management System (AIMS).

Accelerator Overview

Foundations of AI Governance introduces Impact customers to the core principles and vocabulary of Artificial Intelligence Management System (AIMS) as defined by ISO/IEC 42001. Designed as the entry point for customers seeking to advance their AI governance maturity, this session will work as part one of a three-part series where we introduce, adopt, then audit customer AIMS as part of a comprehensive consulting solution. It also includes key resources and leading practice guides to help them approach AI governance with confidence.

Note: This Accelerator is available for Impact Guided+ (Strategic Value add-on), Advanced and Total Packages.

Prerequisites

Customer has identified the necessary stakeholders who can discuss AI governance with confidence.

What You Get

Introductory Customer Session (Up to 1 hour)

Includes the following:

- What is an AIMS?
- Why implement one?
- Review stakeholder expectations
- Vocabulary overview
- Principles drafting
- Maturity evaluation

Customer Coaching Session (Up to 1 hour)

Session includes:

- Use case brainstorm
- Risk triage
- Light boundary mapping
- Success & safety criteria

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- Pilot selection
- Next steps

Follow-Up Customer Session (optional upon Customer request - up to 1 hour)

- Opportunity for Questions and Answers related to AI Governance
- Provide additional guidance on leading practices

Requested Customer Resources

Customer resource and responsibilities

Customer Resource	Responsibilities	Required	Recommend
Platform Owner	Responsible for the overall accountability of the ServiceNow platform. Provides leadership and oversight to the System Administrators, ensures team alignment to business strategy and the ServiceNow roadmap, and is actively involved in the overarching governance of the platform.	#	
Executive Sponsor	Set direction and purpose, champion principles, provide cover & resources, bridge to stakeholders, create momentum.	#	
System Administrator(s)	Maintains the stability and usability of the ServiceNow platform. Performs application maintenance, manages support for cases related to ServiceNow applications. Contributes to ServiceNow software releases by delivering configuration tasks and features.	#	
AI Stakeholder(s)	Learn specific vocabulary and validate foundational concepts for the organization, serve as a key resource for aligning current AI use cases with information provided.	#	
Risk Management Stakeholder(s)	Learn specific vocabulary and validate foundational concepts for the organization, serve as a key resource for aligning with Risk Management practices across the org.	#	
Governance Stakeholder(s)	Learn specific vocabulary and validate foundational concepts for the organization, serve as a key resource for advancing Governance initiatives.	#	
Trusted Service Partner(s)	Attends ServiceNow Impact Accelerator coaching session(s) to understand leading practices and potentially support customer going forward.		#

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Requested Information / Access

1. Organization & scope
   a. Business context and objectives for AI (where value/risk sits), geographies served, regulated markets.
   b. Desired initial AIMS scope (org units, products, services) and any out-of-scope areas.
   c. Existing management systems/certifications (for example, ISO 27001/27701, SOC 2, QMS) we can align to.
2. Governance & people
   a. Executive sponsor, product owners, risk/compliance, privacy, security, legal, data science/ML, IT ops—names and roles (RACI if you have one).
   b. Existing committees/charters (ethics board, model risk committee), decision rights, and escalation paths.
3. Stakeholders & expectations
   a. Internal/external stakeholders (customers, regulators, employees, impacted communities) and their top expectations/concerns.
   b. Any trust/safety commitments already made publicly or contractually.
4. Risk & compliance posture
   a. Applicable laws/regimes you care about (for example, sectoral rules, state privacy laws, EU AI Act mapping if relevant) and current gap analyses.
   b. Known AI incidents/near misses, complaints, or audit findings; current risk taxonomy and appetite/tolerances.
   c. Frameworks already in play (ISO 31000, ISO/IEC 23894, NIST AI RMF).

Exclusions

- ServiceNow is not responsible for implementing Foundations of AI Governance recommendations.
- ServiceNow does not guarantee any strategic outcomes from this engagement.

HRSD Maturity Assessment

This accelerator assesses your current HR Service Delivery (HRSD) processes and functional maturity within ServiceNow, providing targeted recommendations on next steps to unlock additional value from the platform.

Accelerator Overview

The HRSD Maturity Assessment provides Impact customers with prescriptive recommendations based on a structured assessment conducted by key stakeholders within the customer's business. By offering customers a snapshot of their current process maturity and targeted next-step recommendations, this accelerator helps maximize the value of their ServiceNow investment.

This accelerator is designed to address the following HRSD capabilities:

- Case and Knowledge
- Employee Center and Portal
- Life cycle Events/Onboarding/Journeys
- Employee Document Management

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- HCM Integrations
- Specific store features, such as Manager Hub

Note: This Accelerator is available for Impact Guided+ (Strategic Value add-on), Advanced and Total Packages.

What you get

Maturity Assessment Kickoff Session (up to 1.5 hours)

- Set expectations on the process and depth of deliverable
- Communicate expectations for customer participation
- Request data and any other inputs

Maturity Assessment Questionnaire

Your assessment participants will each be asked to independently fill out a prebuilt HRSD Maturity Assessment Questionnaire that asks them to grade targeted statements to assess gaps and opportunities with your HRSD deployment.

Questionnaire Results Analysis (time as needed determined by the Impact Squad)

The Impact Squad performs the following:

- Reviews and analyzes the questionnaire scores
- Compiles tailored recommendations and leading practices
- Provides guidance that will help you understand how to best maximize your HRSD investment

HSRD Maturity Assessment report

The assessment report is compiled from the responses to the questionnaire and includes the following:

- Maturity score
- The top five recommendations of unadopted product features in the standard NowCreate crawl/walk/run model
- Content, accelerators, and next steps where applicable
- A complete list of recommendations observed

Customer read-out session (up to 1.5 hours)

- Deliver HRSD Maturity Assessment report
- Review HRSD Maturity Assessment report
  - Present the assessment results
  - Discuss targeted recommendations
  - Provide a suggested plan and resources to help you decide which recommendations to implement

Follow-up customer session (optional on Customer request– up to 1 hour)

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- Review Customer progress
- Identify additional resources to achieve Customer goals
- Provide additional guidance on leading practices

Requested customer resources

One or more customer resources are requested. The specific number of resources provided is Accelerator and customer specific.

Customer resource and responsibilities

Customer Resource	Responsibilities	Required	Recommended
Main Customer Contact, PMO	This individual is the primary contact for the duration of the engagement and carries out the following responsibilities: • Gathers and shares the list of assessment participants • Ensures completion of the assessment by participants • Provides sponsorship for outputs based on the recommendations	#	
Participants	These are the people within your organization that will be completing the assessment. Their responsibilities are: • Complete the assessment by the agreed deadline • Raise any questions or concerns as soon as possible	#	
Process Owner	Owns the process being accessed	#	

Requested Information / Access

We request that the HRSD Maturity questionnaire is completed by the customer virtually a minimum of two weeks prior to the customer readout session.

Exclusions

- This Impact Accelerator does not include a technical review of HRSD.
- Assessment of other EWF capabilities beyond HRSD is not included.
- ServiceNow is not responsible for implementing the recommendations made based on the HR Service Delivery Maturity Assessment.

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IRM Maturity Assessment

This accelerator assesses your current Integrated Risk Management (IRM) processes and functional maturity within ServiceNow, providing targeted recommendations on next steps to unlock additional value from the platform.

Accelerator Overview

Integrated Risk Management Maturity Assessment provides Impact customers with prescriptive recommendations based on a structured assessment conducted by key stakeholders within the customer's business.

By offering customers a snapshot of their current process maturity and targeted next-step recommendations, this accelerator helps maximize the value of their ServiceNow investment.

Note: This Accelerator is available for Impact Guided+ (Strategic Value add-on), Advanced and Total Packages.

What you get

IRM Maturity Assessment Kickoff Session (up to 1.5 hours)

- Set expectations on the process and depth of deliverable
- Communicate expectations for customer participation
- Request data and any other inputs

IRM Maturity Assessment Questionnaire

Your assessment participants are asked to independently fill out a prebuilt IRM Maturity Assessment Questionnaire that asks targeted questions to assess gaps and opportunities with your IRM product.

Questionnaire Results Analysis (time as needed determined by the Impact Squad)

The Impact Squad performs the following:

- Reviews and analyzes the questionnaire scores
- Compiles tailored recommendations and leading practices
- Provides guidance that helps you understand how to best maximize your IRM product investment

IRM Maturity Assessment Report

The assessment report is a result of the questionnaire and input from ServiceNow IRM leaders and includes the following:

- Maturity score
- The top five recommendations of unadopted product features for IRM
- Additional initiatives or Impact Accelerators to conduct, or specific recommendations to achieve outcomes
- A complete list of recommendations observed

Customer Readout Session (up to 1.5 hours)

- Deliver the IRM Maturity Assessment report
- Review the IRM Maturity Assessment report:

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- Present the assessment results
  - Discuss targeted recommendations
  - Provide a suggested plan and resources to help you decide which recommendations to implement

Follow-up Session (up to 1 hour)

- Opportunity for Q&A related to the IRM Maturity Assessment
- Provide additional guidance on leading practices, as needed

Requested customer resources

Customer resource and responsibilities

Customer Resource	Responsibilities		
Main Customer Contact, PMO	This individual is the primary contact for the duration of the engagement and carries out the following responsibilities: • Gathers and shares the list of assessment participants • Ensures completion of the assessment by participants • Provides sponsorship for outputs based on the recommendations	#	
Assessment Participants	These are the people within your organization that will be completing the assessment. Their responsibilities are: • Complete the assessment by the agreed deadline • Raise any questions or concerns as soon as possible	#	
Process Owner	Owns the process being assessed	#	

Requested Information/Access

We request that the IRM Maturity questionnaire is completed by the customer virtually at least two weeks prior to the customer readout session.

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Exclusions

•

- This Impact Accelerator does not include a technical review of IRM. ServiceNow is not responsible for implementing the recommendations made based on the IRM Maturity Assessment.
- ServiceNow is not responsible for implementing the recommendations made based on the IRM Maturity Assessment.

ITOM Maturity Assessment

This accelerator assesses your current IT Operations Management (ITOM) processes and functional maturity within ServiceNow, providing targeted recommendations on next steps to unlock additional value from the platform.

Accelerator Overview

IT Operations Management (ITOM) Maturity Assessment provides Impact customers with prescriptive recommendations based on a structured assessment conducted by key stakeholders within the customer's business. By offering customers a snapshot of their current process maturity and targeted next-step recommendations, this accelerator helps maximize the value of their ServiceNow investment.

Note: This Accelerator is available for Impact Guided+ (Strategic Value add-on), Advanced and Total Packages.

What You Get

Maturity Assessment Kickoff Session (up to 1.5 hours)

- Set expectations on the process and depth of deliverable
- Communicate expectations for customer participation
- Request data and any other inputs

Maturity Assessment Questionnaire

Your assessment participants will each be asked to independently fill out a pre-built ITOM Maturity Assessment Questionnaire that asks them to grade targeted statements to assess gaps and opportunities with your ITOM deployment.

Questionnaire Results Analysis (time as needed determined by the Impact Squad)

The Impact Squad performs the following:

- Reviews and analyzes the questionnaire scores
- Compiles tailored recommendations and leading practices
- Provides guidance that helps you understand how to best maximize your ITOM product investment

ITOM Maturity Assessment report

The assessment report is compiled from the responses to the questionnaire and includes the following:

- Maturity score
- The top five recommendations grounded in ServiceNow leading practices

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- Content, accelerators, and next steps where applicable
- A complete list of recommendations observed

Customer Readout Session (up to 1.5 hours)

- Deliver ITOM Maturity Assessment report
- Review ITOM Maturity Assessment report:
  - Present the assessment results
  - Discuss targeted recommendation
  - Provide a suggested plan and resources to help you decide which recommendations to implement

Follow-up customer session (optional on Customer request– up to 1 hour)

- Review Customer progress
- Identify additional resources to achieve Customer goals
- Provide additional guidance on leading practices

Requested Customer Resources

Customer Resource	Responsibilities	Required	Recommended
Main Customer Contact, PMO	This individual is the primary contact for the duration of the engagement and carries out the following responsibilities: • Gathers and shares the list of assessment participants. • Ensures completion of the assessment by participants. • Provides sponsorship for outputs based on the recommendations.	#	
Assessment Participants	These are the people within your organization that will be completing the assessment and carries out the following responsibilities: • Completes the assessment by the agreed deadline. • Raises any questions or concerns as soon as possible.	#	
Process Owner	Owns the process being accessed.	#	

Requested Information/Access

We request that the Customer completes the online ITOM Maturity questionnaire at least two weeks prior to the Customer readout.

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Exclusions

- This Impact Accelerator does not include a technical review of ITOM.
- Assessment of other EWF capabilities beyond ITOM is not included.
- ServiceNow is not responsible for implementing the recommendations made based on the ITOM Maturity Assessment.

ITSM Maturity Assessment

Assesses your current IT Service Management (ITSM) processes and functional maturity within ServiceNow, providing targeted recommendations on next steps to unlock additional value from the platform.

Accelerator overview

ITSM Maturity Assessment provides Impact customers with prescriptive recommendations based on a structured assessment conducted by key stakeholders within the customer's business. By offering customers a snapshot of their current process maturity and targeted next-step recommendations, this accelerator helps maximize the value of their ServiceNow investment.

This accelerator is designed to address the following ITSM capabilities:

- Incident Management
- Problem Management
- Request Management
- Change Management
- Knowledge Management
- Continual Improvement Management
- Service Desk
- CSDM Foundations

Note: This Accelerator is available for Impact Guided+ (Strategic Value add-on), Advanced and Total Packages.

What You Get

Maturity Assessment Kickoff Session (up to 1.5 hours)

- Set expectations on the process and depth of deliverable
- Communicate expectations for customer participation
- Request data and any other inputs

Maturity Assessment Questionnaire

The Assessment participants will each be asked to independently fill out a prebuilt ITSM Maturity Assessment Questionnaire that asks them to grade targeted statements to assess gaps and opportunities with your ITSM deployment.

Questionnaire Results Analysis (time as needed determined by the Impact Squad)

The Impact Squad performs the following:

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- Reviews and analyzes the questionnaire scores
- Compiles tailored recommendations and leading practices
- Provides guidance that will help you understand how to best maximize your ITSM investment

ITSM Maturity Assessment report

ITSM Maturity Assessment report includes:

- Maturity score
- The "top five recommendations" grounded in ServiceNow leading practices
- Additional initiatives or Impact Accelerators to conduct, or specific recommendations to achieve outcomes
- A complete list of recommendations observed

Customer Read-out (up to 1.5 hours)

- Deliver ITSM Maturity Assessment report
- Review ITSM Maturity Assessment report
  - Present the assessment results
  - Discuss targeted recommendations
  - Provide a suggested plan and resources to help you decide which recommendations to implement

Follow-up Customer Session (optional on Customer request – up to 1 hour)

- Opportunity for Q&A related to the ITSM Maturity Assessment
- Provide additional guidance on leading practices

Requested Customer Resources

Customer resource and responsibilities

Customer Resource	Responsibilities	Required	Recommended
Platform Owner	Responsible for the overall accountability of the ServiceNow platform. Provides leadership and oversight to the System Administrators, ensures team alignment to business strategy and the ServiceNow roadmap, and is actively involved in the overarching governance of the platform.	#	
Process Owner	Owns the process being reviewed.	#	
IT Service Desk Manager	Completes the maturity assessment questionnaire	#	
Subject Matter Experts	Completes the maturity assessment questionnaire		#

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Requested Information / Access

We request that the ITSM Maturity questionnaire be completed by the customer virtually at least two weeks prior to the customer readout session.

Exceptions

- This Impact Accelerator does not include a technical review of ITSM.
- ServiceNow is not responsible for implementing the recommendations made based on the ITSM Maturity Assessment.

LSD Maturity Assessment

This accelerator assesses your current Legal Service Delivery (LSD) processes and functional maturity within ServiceNow, providing targeted recommendations on next steps to unlock additional value from the platform

Accelerator overview

Legal Service Delivery Maturity Assessment provides Impact customers with prescriptive recommendations based on a structured assessment conducted by key stakeholders within the customer's business. By offering customers a snapshot of their current process maturity and targeted next-step recommendations, this accelerator helps maximize the value of their ServiceNow investment.

Note: This Accelerator is available for Impact Guided+ (Strategic Value add-on), Advanced and Total Packages.

What You Get

LSD Maturity Assessment kickoff session (up to 1.5 hours)

- Set expectations on the process and depth of deliverable
- Communicate expectations for customer participation
- Request data and any other inputs

LSD Maturity Assessment questionnaire

Your assessment participants are asked to independently fill out a prebuilt LSD Maturity Assessment questionnaire that asks targeted questions to assess gaps and opportunities with your LSD product.

Questionnaire results analysis (time as needed determined by the Impact Squad)

The Impact Squad performs the following:

- Reviews and analyzes the questionnaire scores
- Compiles tailored recommendations and leading practices
- Provides guidance that helps you understand how to best maximize your LSD product investment

LSD Maturity Assessment Report

The assessment report is a result of the questionnaire and input from ServiceNow LSD leaders and includes the following:

- Maturity score
- The top five recommendations of unadopted product features for LSD

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- Additional initiatives or Impact Accelerators to conduct, or specific recommendations to achieve outcomes
- A complete list of recommendations observed

Customer readout session (up to 1.5 hours)

- Deliver the LSD Maturity Assessment report
- Review the LSD Maturity Assessment report:
  - Present the assessment results
  - Discuss targeted recommendations
  - Provide a suggested plan and resources to help you decide which recommendations to implement

Follow-up Session (up to 1 hour)

- Opportunity for Q&A related to the LSD Maturity Assessment
- Provide additional guidance on leading practices, as needed

Requested customer resources

One or more customer resources are requested. The specific number of resources provided is accelerator and customer specific.

Customer resource and responsibilities

Customer resource	Responsibilities	Required	Optional
Main Customer Contact, PMO	This individual is the primary contact for the duration of the engagement and carries out the following responsibilities: • Gathers and shares the list of assessment participants • Ensures completion of the assessment by participants • Provides sponsorship for outputs based on the recommendations	#	
Assessment Participants	These are the people within your organization that will be completing the assessment. Their responsibilities are: • Complete the assessment by the agreed deadline • Raise any questions or concerns as soon as possible	#	
Process Owner	Owns the process being assessed	#	

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Requested information / access

We request that the LSD Maturity questionnaire is completed by the Customer virtually a minimum of two weeks prior to the Customer readout session.

Exclusions

- This Impact Accelerator does not include a technical review of LSD.
- ServiceNow resources are not responsible for implementing LSD recommendations on Customer's non-production or production instances.

On-Demand Value Report

Customers can use this Accelerator to request a Value Report for up to two ServiceNow products.

Accelerator Overview

This Accelerator helps Guided customers to understand the value their organization has achieved with ServiceNow products for standard ServiceNow objectives and outcomes.

It provides a Value Report that summarizes key results and, if necessary, monetizes the results of key business outcomes for up to two products.

Note: Only standard objectives and outcomes as captured in the Impact Delivery Instance (IDI) for selected products can be part of the Value Report.

The Value Report provides incremental improvement compared to a prior period. ServiceNow teams recommend a year-on-year comparison as the ideal time frame for identifying performance improvement to account for factors such as seasonality, but other frequencies may be used based on a customer's needs.

Prerequisites

- Products analyzed must have been live for at least 12 months (exceptions may be discussed with your Squad).
- Customer objectives, outcomes, and success metrics must be defined in the Impact Delivery Instance (IDI) and preferably discussed in Outcomes insights reviews with your CSM.

What You Get

Customer kick-off session (up to 1 hour):

- Align on scope, purpose, and type of Value Report
- Understand available data, review data request, or both, for success metric data

Preliminary review of key metric improvements (completed by ServiceNow)

Customer working sessions (as needed, up to 2 hours):

- Review and discuss key metric improvements for the customer since the baseline period
- Validate monetization assumptions

Developed draft of Value Report (completed by ServiceNow)

Customer review session (up to 1 hour):Review, validate, and deliver final Value Report.

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Time to Complete: Time taken to deliver the final Value report varies basis the customer and data availability, but the process typically takes between 2-4 weeks.

Requested customer resources

One or more customer resource is requested. The specific number of resources provided is Accelerator and customer specific.

Customer resource and responsibilities

Customer resource	Responsibilities	Required	Optional
Platform owner	Responsible for the overall accountability of the ServiceNow platform. Provides leadership and oversight to the System Administrators, ensures team alignment to business strategy and the ServiceNow roadmap, and is actively involved in the overarching governance of the platform.	#	
Executive sponsor	Primary strategic contact for ServiceNow. Responsible for driving the business decision to deploy new products.		#
Business owners	Line of business service owner(s) who can provide insight into the analysis to reflect the value realized by ServiceNow accurately.		#
Reporting specialist	Individual who can help provide and review the data required to complete the analysis.		#

Exclusions

- Customer is responsible for validating key assumptions and providing data. Consult your CSM on secure and automated data sharing options
- Report includes standard ServiceNow outcomes and success metrics and excludes the analysis of custom objectives or outcomes

The delivery of this Accelerator is subject to a preliminary review by a Value SME to ensure that the availability and quality of data is sufficient to deliver a robust value report.

Note: This Accelerator is available for the Impact Guided package. Impact Advanced and Total packages include Value Reports as an entitlement. See Value Reports for more information.

Portfolio Governance

Guidance on building a strategic portfolio management process

Overview

Portfolio Governance provides Impact Customers with leading practices and prescriptive guidance on the demand management process, including demand generation, demand scoring,

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and the transition to design/development. This Impact Accelerator aims to assist Customers in creating a portfolio governance capability that is connected to strategic governance, building cross-enterprise alignment on strategic priorities for more effective and holistic solutions to enhance speed to value.

Note: This Accelerator is available in Advanced and Total packages.

What you get

Introductory Customer Session (up to 60 min)

- Set expectations on process and depth of deliverable.
- Communicate expectation for Customer participation.
- Request data and any other inputs.

Customer Workshop (up to 4 hrs)

- Review current state of demand management.
- Discuss leading practice content.
- Propose action plan items for Customer to execute.

Portfolio Governance Deliverables

- Workshop slides
- Action planning notes
- Action planning templates

Follow-Up Customer Session (optional upon Customer request - up to 60 min)

- Opportunity for Q&A related to portfolio governance deliverables.
- Provide additional guidance on leading practices.

Requested customer resources

Customer resource and responsibilities

Customer Resource	Responsibilities
Platform Owner- Required	Responsible for the overall accountability of the ServiceNow platform. Provides leadership and oversight to the System Administrators, ensures team alignment to business strategy and the ServiceNow roadmap, and is actively involved in the overarching governance of the platform.
Executive Sponsor - Required	Primary strategic contact for ServiceNow.

Requested information/access

- ServiceNow governance structure documents – charters, board participant lists, etc.
- CoE Charter
- Organization chart
- IT governance documents
- Demand process workbook – intake forms, assessment scorecards, etc.

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- EA process workbook
- Project plans & implementation timelines
- Design Review policies
- Development methodology and process (agile and/or waterfall)

Exceptions

ServiceNow is not responsible for execution of the portfolio management process.

PPM Maturity Assessment

This accelerator assesses your current Project Portfolio Management (PPM) processes and functional maturity within ServiceNow, providing targeted recommendations on next steps to unlock additional value from the platform.

Accelerator Overview

Project Portfolio Management (PPM) Maturity Assessment provides Impact customers with prescriptive recommendations based on a structured assessment conducted by key stakeholders within the customer's business. By offering customers a snapshot of their current process maturity and targeted next-step recommendations, this accelerator helps maximize the value of their ServiceNow investment.

Note: This Accelerator is available for Impact Guided+ (Strategic Value add-on), Advanced and Total Packages.

What You Get

PPM Maturity Assessment Kickoff Session (up to 1.5 hours)

- Set expectations on process and depth of deliverable
- Communicate expectation for Customer participation
- Request data and any other inputs

Maturity Assessment Questionnaire

Your assessment participants will each be asked to independently fill out a pre-built PPM Maturity Assessment Questionnaire that asks them to grade targeted statements to assess gaps and opportunities with your PPM product.

Questionnaire Results Analysis (time determined by Impact Squad, as needed)

Your Impact Squad will:

- Review and analyze the questionnaire scores
- Compile tailored recommendations and leading practices
- Provide guidance that will help you understand how to best maximize your PPM product investment

PPM Maturity Assessment report

The assessment report is a result of the questionnaire and input from our PPM leaders and includes the following:

- Maturity score
- The top five recommendations of unadopted product features for PPM

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- Additional initiatives or Impact accelerators to conduct, or specific recommendations to achieve outcomes
- A complete list of recommendations observed

Customer Readout Session (up to 1.5 hours)

- Deliver the PPM Maturity Assessment report
- Review the PPM Maturity Assessment report:
  - Present the assessment results
  - Discuss targeted recommendations
  - Provide a suggested plan and resources to help you decide which recommendations to implement

Follow-up (up to 1 hour)

- Opportunity for Questions and Answers related to the PPM Maturity Assessment
- Provide additional guidance on leading practices as needed

Requested Customer Resources

Customer resource and responsibilities

Customer Resource	Responsibilities	Required	Recommended
Assessment Participants	These are the people within your organization that will be completing the assessment. Their responsibilities are: • Complete the assessment by the agreed deadline • Raise any questions or concerns as soon as possible	#	
Main Customer Contact, PMO	This individual is the primary contact for the duration of the engagement and carries out the following responsibilities: • Gathers and shares the list of Assessment Participants • Ensures completion of the assessment by the Assessment Participants • Provides sponsorship for outputs based on the recommendations	#	
Process Owner	Owns the process being assessed	#	

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Requested Information / Access

We request that the PPM Maturity questionnaire is completed by the customer virtually a minimum of two weeks prior to the customer readout session.

Exclusions

- This Impact Accelerator does not include a technical review of PPM.
- ServiceNow is not responsible for implementing the recommendations made based on the PPM Maturity Assessment.

ServiceNow Governance

Guidance on building ServiceNow Governance boards and policies.

Overview

ServiceNow Governance provides Impact Customers with a framework that streamlines the decision-making required to define how your organization should use and manage the ServiceNow AI Platform. This includes setting up governance across strategy, portfolio, and technical domains. This Impact Accelerator aims to assist Customers in driving their transformation vision, delivering the right work at the right time, and maintaining the technical integrity of their ServiceNow implementation.

What You Get

Introductory Customer Session

- Set expectations on process and depth of deliverable
- Communicate expectation for Customer participation
- Review educational material on ServiceNow governance across strategy, portfolio and technical domains
- Request data and any other inputs from Customer

Discovery Sessions

- Assess current governance model across strategy, portfolio, and technical domains, including:
  - Customer’s vision and strategy roadmap decisions
  - Customer’s demand management
  - Customer’s environment, platform, data, and development management
- Discuss leading practice content
- Propose action plan items for Customer to execute

Customer Workshops

- Dedicated workshop(s) on setting up strategy governance and the executive steering board
- Dedicated workshop(s) on setting up portfolio governance and the demand board

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- Dedicated workshop(s) on setting up technical governance and the technical governance board
- Dedicated workshop(s) on how the three main domains of governance work together

Note: Each workshop includes educational material and interactive activities that will help the Customer design their governance boards and ServiceNow Governance policies.

Governance Deliverables

- Workshop slides
- Action planning notes
- Action planning templates
- Draft designs for governance model & processes

Follow-Up Customer Session

- Opportunity for Q&A related to governance deliverables
- Opportunity to run through additional governance simulations to test the Customer's new governance structure
- Provide additional guidance on leading practice

Requested Customer Resources

Customer resource and responsibilities

Customer Resource	Responsibilities
ServiceNow Executive Sponsor- Required	Primary strategic contact for ServiceNow.
Platform Owner- Required	Responsible for the overall accountability of the ServiceNow platform. Provides leadership and oversight to the System Administrators, ensures team alignment to business strategy and the ServiceNow roadmap, and is actively involved in the overarching governance of the platform.

Requested Information / Access

Strategy Governance:

- Organization chart for consumers and delivery in the platform
- Defined vision & strategy for ServiceNow
- Strategy roadmap and technical roadmap for ServiceNow
- Documented OKRs, themes and epics
- Business outcomes aligned to the platform
- Business case or business case templates relating to the platform
- IT governance documents relating to the platform
- Steering board documents, for example

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- charters
- board participants lists and roles
- steering board agendas

Portfolio Governance:

- Details of any enterprise-level demand forums
- Any existing ServiceNow demand processes and forums- e.g.: process, intake forms, assessment scorecards, etc.
- Existing Demand board documents, for example: charters, board participant lists, agendas
- A view of any in-flight or upcoming platform demand including Project plans & timelines
- Organization chart- specifically aimed at highlighting where demand can originate
- CoE Charter (if in place)
- EA process workbook
- Development methodology and process (agile and/or waterfall)
- Demand scoring & weighting criteria

Technical Governance:

- Technology governance documents (charters, agendas) - specifically
  - Any enterprise-wide technology governance which may need alignment with
  - Any enterprise-wide technology architecture standards to be observed
  - Any existing platform technical governance boards
- Architecture blueprint
- Project backlog
- IT strategic plan
- Pain points, business drivers, and desired business outcomes

Exceptions

ServiceNow is not responsible for execution of the strategy governance policy or process.

SAM Maturity Assessment

This accelerator assesses your current Software Asset Management (SAM) processes and functional maturity within ServiceNow, providing targeted recommendations on next steps to unlock additional value from the platform.

Accelerator overview

Software Assessment Management (SAM) Maturity Assessment provides Impact customers with prescriptive recommendations based on a structured assessment conducted by key stakeholders within the customer's business.

By offering customers a snapshot of their current process maturity and targeted next-step recommendations, this accelerator helps maximize the value of their ServiceNow investment.

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Note: This Accelerator is available for Impact Guided+ (Strategic Value add-on), Advanced and Total Packages.

What you get

SAM Maturity Assessment Kickoff Session (up to 1.5 hours)

- Set expectations on the process and depth of deliverable
- Communicate expectations for customer participation
- Request data and any other inputs

SAM Maturity Assessment Questionnaire

Your assessment participants will each be asked to independently fill out a pre-built SAM Maturity Assessment Questionnaire that asks them to grade targeted statements that assess gaps and opportunities with your SAM product.

Questionnaire Results Analysis (time as needed determined by the Impact Squad)

The Impact Squad performs the following:

- Reviews and analyzes the questionnaire scores
- Compiles tailored recommendations and leading practices
- Provides guidance that will help you understand how to best maximize your SAM product investment

SAM Maturity Assessment Report

The assessment report is a result of the questionnaire and input from our SAM leaders and includes the following:

- Maturity score
- The "top five recommendations" grounded in ServiceNow leading practices
- Additional initiatives or Impact Accelerators to conduct, or specific recommendations to achieve outcomes
- A complete list of recommendations observed

Customer Readout Session (up to 1.5 hours)

- Deliver the SAM Maturity Assessment report
- Review the SAM Maturity Assessment report:
  - Present the assessment results
  - Discuss targeted recommendations
  - Provide a suggested plan and resources to help you decide which recommendations to implement

Follow-up Session (up to 1 hour)

- Opportunity for Q&A related to the SAM Maturity Assessment
- Provide additional guidance on leading practices, as needed

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Requested customer resources

Customer resource and responsibilities

Customer Resource	Responsibilities		
Main Customer Contact, PMO	This individual is the primary contact for the duration of the engagement and carries out the following responsibilities: • Gathers and shares the list of assessment participants • Ensures completion of the assessment by participants • Provides sponsorship for outputs based on the recommendations	#	
Assessment Participants	These are the people within your organization that will be completing the assessment. Their responsibilities are: • Complete the assessment by the agreed deadline • Raise any questions or concerns as soon as possible	#	
Process Owner	Owns the process being assessed	#	

Requested Information/Access

We request that the SAM Maturity questionnaire is completed by the customer virtually at least two weeks prior to the customer readout session.

Exclusions

- This Impact Accelerator does not include a technical review of SAM.
- ServiceNow is not responsible for implementing the recommendations made based on the SAM Maturity Assessment.

Staffing and Roles Review

Insights into staffing and roles.

Staffing and Roles Review – Advanced

Guidance on effective role alignment

Overview

Staffing and Roles Review provides Impact Customers with leading practices content and prescriptive guidance to assist Customers in their analysis of roles, responsibilities, and potential skills gaps that currently exist in their ServiceNow program team to inform hiring, partnering, and outsourcing needs in support of their ServiceNow strategy. It aims to guide Customers

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on building an effective team to assist in execution on their ServiceNow vision and strategy, appropriate staffing to support the business, and approaches to reduce attrition.

ServiceNow encourages Customer to request this Accelerator in conjunction with the CoEI Design Accelerator.

What You Get

Introductory Customer Session (up to 60 min)

- Set expectations on process and depth of deliverable
- Communicate expectation for Customer participation
- Request data and any other inputs

Discovery Sessions

Review customer-provided artifacts and clarify any gaps.

Customer Readout (up to 60 minutes)

Review general organizational structure, staffing, and role suggestions in context of ServiceNow vision and strategy.

Follow-Up Customer Session (optional upon Customer request - up to 60 min)

- Opportunity for Q&A related to general resourcing guidance in context of ServiceNow vision and strategy
- Provide additional guidance on leading practices

Requested Customer Resources

Customer resource and responsibilities

Customer Resource	Responsibilities
Platform Owner- Required	Responsible for the overall accountability of the ServiceNow platform. Provides leadership and oversight to the System Administrators, ensures team alignment to business strategy and the ServiceNow roadmap, and is actively involved in the overarching governance of the platform.
ServiceNow AI Platform & Development team lead- Recommended	Manages platform operations and development on the ServiceNow platform.

Requested Information / Access

- General organizational chart and resourcing detail, not to include personnel names, or other sensitive information, or specific reduction in force planning
- Roles and responsibility definitions

Exceptions

ServiceNow will not be involved in resource selection processes.

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Staffing and Roles Review – Total

Guidance on effective role alignment

Overview

Staffing and Roles Review provides Impact Customers with leading practices content and prescriptive guidance to assist Customers in their analysis of roles, responsibilities, and potential skills gaps that currently exist in their ServiceNow program team to inform hiring, partnering, and outsourcing needs in support of their ServiceNow strategy. It aims to guide Customers on building an effective team to assist in execution on their ServiceNow vision and strategy, appropriate staffing to support the business, and approaches to reduce attrition.

ServiceNow encourages Customer to request this Accelerator in conjunction with the CoEI Design Accelerator.

What You Get

Introductory Customer Session (up to 60 min)

- Set expectations on process and depth of deliverable
- Communicate expectation for Customer participation
- Request data and any other inputs

Discovery Sessions (up to 8 hours, depending on number of discovery workshops / interviews)

- Review customer-provided artifacts and clarify any gaps
- Discuss current state of roles and responsibilities as well as the target maturity for Customer's organizational model

Customer Readout (up to 3 hours)

- Review general organizational structure, staffing, and role suggestions in context of ServiceNow vision and strategy
- Review and walk-through supporting resources that customer can use to execute against role and staffing suggestions

Follow-Up Customer Session (optional upon Customer request - up to 60 min)

- Opportunity for Q&A related to general resourcing guidance in context of ServiceNow vision and strategy
- Provide additional guidance on leading practices

Requested Customer Resources

Customer resource and responsibilities

Customer Resource	Responsibilities
ServiceNow Executive Sponsor – Required	Primary strategic contact for ServiceNow
Platform Owner- Required	Responsible for the overall accountability of the ServiceNow platform. Provides leadership and oversight to the System Administrators, ensures team alignment to business strategy

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Customer resource and responsibilities (continued)

Customer Resource	Responsibilities
	and the ServiceNow roadmap, and is actively involved in the overarching governance of the platform.
ServiceNow AI Platform & Development team lead-Recommended	Manages platform operations and development on the ServiceNow platform.

Requested Information / Access

- General organizational chart and resourcing detail, not to include personnel names, or other sensitive information, or specific reduction in force planning
- Customer's charters and/or governance charters as applicable to ServiceNow deployment
- Customer must have completed the Vision & Strategy Accelerator, and provide the ServiceNow vision & strategy map
- Details on existing ServiceNow partner landscape
- Roles and responsibility definitions

Exceptions

ServiceNow will not be involved in resource selection processes.

Stakeholder Path to Value

The Stakeholder Path to Value Accelerator helps Impact customers accelerate the value creation through Stakeholder alignment.

Accelerator Overview

The Stakeholder Path to Value Accelerator equips Impact squads and customers with deep qualitative insights into how process owners and key stakeholders utilize the ServiceNow platform to deliver vital services across the organization.

This initiative focuses on understanding how critical applications are being used, whether they are delivering the expected value, and how Impact can help customers maximize their investment. Unlike traditional metrics-based approaches, this continuous improvement effort explores the 'why' and 'how' behind user behaviors, opinions, and experiences.

These insights are instrumental in uncovering customer motivations, identifying opportunities to boost adoption and automation, and guiding Impact support strategies that align with business priorities. When combined with usage data and metrics from other accelerator programs, these insights provide a comprehensive view of adoption and ROI.

Note: This Accelerator is available for Impact Guided+ (Strategic Value add-on), Advanced and Total Packages.

Prerequisites

Impact Foundations Activities along with documented Vision and Strategy.

What You Get

Stakeholder Discovery Think Tank(s)

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Purpose: Gain a deep understanding of your business priorities, challenges, and opportunities through collaborative sessions.

What to expect:

- Impact-led interviews#with your key stakeholders (ideally one session per Business Unit or Division, ~60 min each)
- Exploration of critical topics:
  - Goals and success measures
  - Current challenges and pain points
  - Opportunities for improvement
  - Business value drivers
  - Wish list and support needs
- Synthesis of insights#into themes and trends that matter most to your organization

Your Commitment:

- Provide access to process owners and key stakeholders
- Dedicate time for each session (virtual or in-person)

Executive Readout and Recommendations

Purpose:#Align leadership on findings and next steps.

What You'll Receive:

- Insights#summarized into business themes and priorities
- Refined partnership vision#aligned to your strategy
- Strategic roadmap#with clear milestones
- Product adoption roadmap#to accelerate value realization
- Tactical action plan#with next steps and ownership
- Access to leading practices and key resources#to support execution

Your Benefit: A clear, actionable plan to drive measurable impact across your organization.

Requested Customer Resources

Customer Resource and Responsibilities

Customer Resource	Responsibilities	Required	Recommended
Platform Owner	The platform owner plays a pivotal role in communicating intent, outcomes, and level of effort to process owners and other key stakeholders who will participate in workshops. They manage calendar invites using messaging provided by Impact. They act as the bridge	#	

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Customer Resource and Responsibilities (continued)

Customer Resource	Responsibilities	Required	Recommended
	between business needs and the platform capabilities, ensuring that outcomes from these sessions translate into actionable improvements.		
Process Owner(s)	A senior leader within each business unit for each major process or service (for example, customer service, incident, HR, legal, finance, security, etc.) who is accountable for ensuring the process is fit for purpose.	#	
Customer Success Executive (CSE)	The CSE is the primary owner of all accelerator workflows. Responsible for collaborating with business and process stakeholders to define workshop purpose, outcomes, audience, and format. Co-leads workshops with CSM and PA. Helps process owners understand what's possible with the Platform now and what may require additional development or investment. Captures and analyzes findings, develops tactical action plan, revises the strategic roadmap, leads platform owner debriefs, prepares and delivers executive level readouts, and communicates risks and opportunities to the core team.	#	
Customer Success Manager (CSM)	The CSM supports workshop scheduling, co-leads workshops with the CSE and PA, helps inform the tactical action plan, prioritizes and aligns Impact engagements with needs of the business, revises the strategic roadmap, and supports follow-on activities.	#	
Platform Architect (PA)	The Platform Architect co-leads workshops with the CSE and CSM, leading discussions that are more technical in nature. Responsible for	#	

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Customer Resource and Responsibilities (continued)

Customer Resource	Responsibilities	Required	Recommended
	mapping business needs and pain points shared by process owners to platform capabilities, enhancements, or configuration options. Supports follow-on activities.		
Support Account Manager (SAM)	The SAM may attend any workshop interviews where they may benefit from increased customer engagement, or if they would like to gain knowledge in a specific area of the business or platform to better support the customer.		#
Developer(s)	Makes changes within the ServiceNow platform to meet process requirements.		#
Trusted Service Partners	Attends ServiceNow Impact Accelerator coaching session(s) to understand leading practices and potentially support customers going forward.		#
Other Customer Roles	Primary stakeholders responsible for agent experience and engagement, including Customer Service Agents, team leaders and User Experience champions.		#

Requested Information / Access

Vision and strategy; objectives and outcomes, strategic roadmap, Product Adoption Roadmap, value drivers.

Exclusions

ServiceNow is not responsible for the execution of Stakeholder Path to Value recommendations.

Strategy Governance

Guidance on aligning ServiceNow strategic roadmap to business outcomes

Overview

Strategy Governance provides Impact Customers with leading practice recommendations on the establishment and operation of strategy governance, which will assist Customer in driving decisions aligning a ServiceNow strategic roadmap to business outcomes.

Note: This Accelerator is available in Advanced and Total packages.

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What you get

Introductory Customer Session (up to 60 min)

- Set expectations on process and depth of deliverable.
- Communicate expectation for Customer participation.
- Request data and any other inputs.

Customer Workshop (up to 4 hrs)

- Review current state of strategy roadmap decisions.
- Discuss leading practice content.
- Propose action plan items for Customer to execute.

Strategy Governance Deliverables

- Workshop slides
- Action planning notes
- Action planning templates

Follow-Up Customer Session (optional upon Customer request - up to 60 min)

- Opportunity for Q&A related to strategy governance deliverables.
- Provide additional guidance on leading practices.

Requested customer resources

Customer resource and responsibilities

Customer Resource	Responsibilities
Platform Owner- Required	Responsible for the overall accountability of the ServiceNow platform. Provides leadership and oversight to the System Administrators, ensures team alignment to business strategy and the ServiceNow roadmap, and is actively involved in the overarching governance of the platform.
Executive Sponsor - Required	Primary strategic contact for ServiceNow.

Requested information/access

- ServiceNow governance structure documents – charters, board participant lists, etc.
- CoE Charter
- Organization chart
- IT governance documents
- Current ServiceNow strategic roadmap, mission, vision document
- Documented OKR, themes, and epics
- Business KPIs
- Business case (or business case templates)

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Exceptions

ServiceNow is not responsible for execution of the strategy governance process.

Success Readiness Assessment (SRA)

This accelerator measures readiness and platform maturity of your ServiceNow platform.

Overview

The Success Readiness Assessment (SRA) is a process designed to identify, target, and prescribe areas of improvement during the digital transformation journey with the ServiceNow platform.

The SRA is composed of a series of interviews with a range of stakeholders used to solicit quantitative and qualitative customer feedback. These interviews produce trackable data that provides a baseline of information the Impact Squad can use when recommending improvement steps.

Note: This Accelerator is available in the Advanced and Total Packages.

What You Get

Introductory Customer Session (up to 60 min):

- Provide an overview of the SRA and its importance
- Review the SRA process and deliverable
- Communicate expectation for Customer participation
- Request data and any other inputs

Discovery Customer Sessions (up to 90 min per interview):

The SRA interviews are designed to:

- Uncover disconnects and misalignments between stakeholders
- Identify where gaps exist that impact long-term success
- Pinpoint outlying areas to improve capacity and competency
- Build a baseline maturity score across thirteen focus areas

SRA Read-out Session (up to 90 minutes):

This session is designed to:

- Present the results to stakeholders summarizing the SRA findings
- Discuss recommendations and next steps based on findings

SRA Deliverable:

Executive readout deck with documented recommendations from Impact Squad based on SRA results.

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Requested Customer Resources

Customer resource and responsibilities

Customer Resource	Responsibilities
Platform Owner (Required)	Responsible for the overall accountability of the ServiceNow platform. Provides leadership and oversight to the System Administrators, ensures team alignment to business strategy and the ServiceNow roadmap, and is actively involved in the overarching governance of the platform.
System Administrator(s) (Required)	Maintains the stability and usability of the ServiceNow platform by performing application maintenance, managing support for cases related to ServiceNow applications, and contributing to ServiceNow software releases by delivering configuration tasks and features.
Reporting Lead (Recommended)	Meets with the ServiceNow Impact Accelerator Consultant, provides access to the required resources, and drives the actions from the engagement.
Trusted Service Partners (Recommended)	Attends ServiceNow Impact Accelerator activities to understand leading practices and potentially support the customer going forward.
Developers (Optional)	Writes code for the ServiceNow platform.

Requested Information / Access

N/A

Exceptions

ServiceNow is not responsible for implementing the recommendations made based on the SRA.

Value Potential

The Value Potential Accelerator provides comprehensive guidance on identifying business value for further adoption of ServiceNow products.

Accelerator overview

Value Potential of undeployed Apps provides Impact customers with support on building a business case for further adoption of ServiceNow products. Through this Accelerator, you'll work with your Customer Success Executive (CSE) and a Value Strategist to estimate the value potential of undeployed products. After completing this Accelerator, you can confidently estimate and articulate the expected business value from further ServiceNow product adoption.

Note: This Accelerator is available for Impact Advanced and Total packages.

In addition, this Accelerator is also available with the Strategic Value Add-on SKU. See Impact packages for additional information.

What you get

Introductory customer session (up to 60 minutes)

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- Set expectations on process and depth of deliverable
- Explain the concept of value potential and its importance
- Clarification of the intent of the deliverable for the customer
- Communicate expectation for customer participation
- Request data and any other inputs
- Set up a plan for assessment

Customer discovery and working sessions (up to 4 hours)

Topics may include:

- Discussion of:
  - Business challenges and target outcomes with key stakeholders
  - Standard outcomes expected with ServiceNow product adoption
- Review of:
  - Expected project deployment scope
  - Data request information provided and to determine any gaps or assumptions

Customer review session (up to 60 minutes)

Review and validate the draft Value Potential presentation and model, if applicable

Follow-up customer session (optional upon customer request, up to 60 minutes)

- Present or co-present the final presentation for Value Potential to additional customer stakeholders
- Provide key success metrics to measure progress and results
- Attend an adoption roadmap session to support with sequencing product adoption plan based on value potential, if relevant

Requested customer resources

One or more customer resources are requested. The specific number of resources provided is Accelerator and customer specific.

Customer resource and responsibilities

Customer resource	Responsibilities	Required	Optional
Application champion or sponsors	Executive sponsor advocating for the application across the entire organization	#	
Platform owner	• Responsible for the overall accountability of the ServiceNow platform. • Provides leadership and oversight to the System Administrators	#	

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Customer resource and responsibilities (continued)

Customer resource	Responsibilities	Required	Optional
	• Ensures team alignment to business strategy and the ServiceNow roadmap • Actively involved in the overarching governance of the platform.		
Process leads	Subject matter expert responsible for managing the applicable process	#	
Reporting leads	• Meets with the ServiceNow Impact Accelerator consultant • Provides access to the required resources • Drives the actions from the engagement		#

Requested Information / Access

The customer is responsible to provide the following:

- Data and validation of the assumptions to inform the analysis
- Cost information in order to be included in the analysis
- Sign off of the final Value Potential report

Exceptions

- This Accelerator only applies to products already under license.
- ServiceNow resources are not responsible for implementing or managing the applications under consideration.
- The scope of each Value Potential Accelerator will be limited to three products. Exceptions may be discussed with your Customer Success Executive (CSE) and Value Strategist.
- Due to the pace of innovation at ServiceNow, some products may not yet be eligible for this Accelerator. Check with your Customer Success Executive (CSE), who can confirm eligibility of target products.

Vision and Strategy

Insights into vision and strategy.

Vision and Strategy – Advanced

Guidance on building a ServiceNow vision and strategy

Overview

Vision & Strategy provides Impact Customers with leading practices content and prescriptive guidance to draft a ServiceNow vision and strategy for their organization that aligns with their strategic priorities, digital transformation efforts, and business outcomes.

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What you get

Introductory Customer Session (up to 60 min)

- Set expectations on process and depth of deliverable
- Communicate expectation for Customer participation
- Request data and any other inputs

Customer Workshop (up to 4 hours)

Discuss:

- Customer's strategic objectives
- Customer's strategy for ServiceNow
- Draft blueprint of ServiceNow vision and strategy

Vision & Strategy Deliverables

- Workshop slides
- Action planning notes
- Vision and strategy blueprint

Follow-Up Customer Session (optional upon Customer request - up to 60 min)

- Opportunity for Q&A related to vision & strategy
- Provide additional guidance on leading practices

Requested customer resources

Customer resource and responsibilities

Customer Resource	Responsibilities
Platform Owner- Required	Responsible for the overall accountability of the ServiceNow platform. Provides leadership and oversight to the System Administrators, ensures team alignment to business strategy and the ServiceNow roadmap, and is actively involved in the overarching governance of the platform.
Executive Sponsor - Required	Primary strategic contact for ServiceNow.

Requested information/access

- Organizational chart with roles & responsibilities
- Organizational strategy documents

Exceptions

ServiceNow is not responsible for execution of vision and strategy.

Vision and Strategy – Total

Guidance on building a ServiceNow vision and strategy

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Overview

Vision & Strategy provides Impact Customers with leading practices content and prescriptive guidance to draft a ServiceNow vision and strategy for their organization that aligns with their strategic priorities, digital transformation efforts, and business outcomes.

What you get

Introductory Customer Session (up to 60 min)

- Set expectations on process and depth of deliverable
- Communicate expectation for Customer participation
- Request data and any other inputs

Customer Workshop (up to 8 hours, as needed depending on number of workshops)

Discuss:

- Run exercises to determine a vision statement for Customer's investment in ServiceNow
- Run exercises to agree upon key strategic business drivers that help deliver against Customer's ServiceNow vision
- Run exercises to establish key business outcomes and KPIs that will measure progress against key strategic business drivers

Vision & Strategy Deliverables

- Workshop slides
- Action planning notes
- Vision and strategy blueprint
- Strategy map (i.e., a one-page summary of the ServiceNow vision & strategy)

Follow-Up Customer Session (optional upon Customer request - up to 60 min)

- Opportunity for Q&A related to vision & strategy
- Provide additional guidance on leading practices

Requested customer resources

Customer resource and responsibilities

Customer Resource	Responsibilities
Platform Owner- Required	Responsible for the overall accountability of the ServiceNow platform. Provides leadership and oversight to the System Administrators, ensures team alignment to business strategy and the ServiceNow roadmap, and is actively involved in the overarching governance of the platform.
Executive Sponsor - Required	Primary strategic contact for ServiceNow.

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Requested information/access

- Organizational chart with roles & responsibilities
- Organizational strategy documents
- Existing planning documents (e.g., capability maps, product roadmaps)
- Business KPIs
- Current state architecture blueprint
- Details on the existing partner landscape

Exceptions

ServiceNow is not responsible for execution of vision and strategy.

Technical Accelerators

Accelerate usage and adoption of specific platform and product capabilities via applied demonstrations, personalized coaching, and best practices with Technical Accelerators.

Accelerators available in each package

Accelerator outputs and formats have common standardized features, but may differ from package to package. Not all Accelerators are available for each package. The Accelerators and available feature levels are denoted by these symbols:

- ✓ = Common standardized feature set
-  = Includes unique accelerator-specific features
-  = Includes additional unique accelerator-specific features

Technical Accelerator sub-catalog

Accelerator	Guided package	Guided +Strategic Value	Guided +Platform Governance	Advanced package	Total package	Restricted and protected environments
Access to Experts		#	#	#	#	
Extend Your AI Search	#	#	#	#	#	
Extend Your Employee Center to Pro	#	#	#	#	#	
Health Assessment – Guided	#					
Introduction to CMDB: Ingestion	#	#	#	#	#	
Introduction to Instance Observer-Guided	#	#	#			
Introduction to Instance Readiness Assessment	#	#	#			

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Technical Accelerator sub-catalog (continued)

Accelerator	Guided package	Guided +Strategic Value	Guided +Platform Governance	Advanced package	Total package	Restricted and protected environments
Jumpstart Your AI Control Tower	#	#	#	#	#	
Jumpstart Your AI Search	#	#	#	#	#	
Jumpstart Your AI Agent Studio	#	#	#	#	#	
Jumpstart Your AI Agents for CSM	#	#	#	#	#	
Jumpstart Your AI Agents for ITSM	#	#	#	#	#	
Jumpstart Your AI Search	#	#	#	#	#	
Jumpstart Your App Engine	#	#	#	#	#	
Jumpstart Your Automated Testing	#	#	#	#	#	
Jumpstart Your CMDB	#	#	#	#	#	
Jumpstart Your CSDM: Crawl	#	#	#			
Jumpstart Your CSDM: Foundation	#	#	#			
Jumpstart Your CSM Configurable Workspace	#	#	#	#	#	
Jumpstart Your Database Management	#	#	#	#	#	
Jumpstart Your Employee Center	#	#	#	#	#	USPS
Jumpstart Your Employee Journey Management	#	#	#	#	#	
Jumpstart Your Event Management	#	#	#	#	#	
Jumpstart Your External Content Connectors	#	#	#	#	#	
Jumpstart Your GenAI	#	#	#	#	#	

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Technical Accelerator sub-catalog (continued)

Accelerator	Guided package	Guided +Strategic Value	Guided +Platform Governance	Advanced package	Total package	Restricted and protected environments
Jumpstart Your Issue Auto Resolution	#	#	#	#	#	
Jumpstart Your ITOM Discovery	#	#	#	#	#	
Jumpstart Your Knowledge Management	#	#	#	#	#	
Jumpstart Your Legacy Workflow Migration	#	#	#	#	#	
Jumpstart Your Migration of Platform Analytics	#	#	#	#	#	
Jumpstart Your Multi-lingual Virtual Agent	#	#	#	#	#	
Jumpstart Your Natural Language Understanding	#	#	#	#	#	
Jumpstart Your Now Assist in Virtual Agent	#	#	#	#	#	
Jumpstart Your Now Assist for Creator	#	#	#	#	#	
Jumpstart Your Now Assist in Document Intelligence	#	#	#	#	#	#
Jumpstart Your Now Assist Skill Kit	#	#	#	#	#	
Jumpstart Your Now Mobile for Employees	#	#	#	#	#	
Jumpstart Your Platform Analytics	#	#	#	#	#	
Jumpstart Your Predictive Intelligence	#	#	#	#	#	
Jumpstart Your Process Mining	#	#	#	#	#	
Jumpstart Your Service Mapping	#	#	#	#	#	
Jumpstart Your Strategic Portfolio	#	#	#	#	#	

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Technical Accelerator sub-catalog (continued)

Accelerator	Guided package	Guided +Strategic Value	Guided +Platform Governance	Advanced package	Total package	Restricted and protected environments
Management - Project Workspace						
Jumpstart your Service Operations Workspace	#	#	#	#	#	
Jumpstart Your ServiceNow AI Journey	#	#	#	#	#	
Jumpstart Your Strategic Portfolio Management - Collaborative Work Management	#	#	#	#	#	
Jumpstart Your Strategic Portfolio Management – Planning Workspace	#	#	#	#	#	
Jumpstart Your Strategic Portfolio Management – Resource Management Workspace	#	#	#	#	#	
Jumpstart Your Subscription Management	#	#	#	#	#	
Jumpstart Your Success Dashboard	#	#	#	#	#	
Jumpstart Your Task Intelligence	#	#	#	#	#	
Jumpstart Your Upgrade	#	#	#	#	#	
Jumpstart Your Virtual Agent	#	#	#	#	#	
Jumpstart Your Workflow Automation: Playbooks	#	#	#	#	#	
TuneUp Your AI Search	#	#	#	#	#	
TuneUp Your CMDB	#	#	#	#	#	
TuneUp Your Employee Center		#	#	#	#	

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Technical Accelerator sub-catalog (continued)

Accelerator	Guided package	Guided +Strategic Value	Guided +Platform Governance	Advanced package	Total package	Restricted and protected environments
TuneUp Your Hardware Asset Management	#	#	#	#	#	
TuneUp Your IT Asset Management	#	#	#	#	#	
TuneUp Your ITOM Discovery	#	#	#	#	#	
TuneUp Your Platform Analytics	#	#	#	#	#	
TuneUp Your Software Asset Management	#	#	#	#	#	
TuneUp Your Security	#	#	#	#	#	
TuneUp Your Virtual Agent - Assessment	#	#	#	#	#	
TuneUp Your Virtual Agent – NLU (Natural Language Understanding)	#	#	#	#	#	
TuneUp Your Virtual Agent – Performance Monitoring	#	#	#	#	#	
TuneUp Your Virtual Agent – UX (User Experience)	#	#	#	#	#	

Access to Experts

The Access to Experts Accelerator connects Impact customers to ServiceNow subject matter experts via personalized virtual coaching sessions.

Accelerator overview

Access to Experts targets precise and actionable guidance on the ServiceNow Platform and product topics for which Impact customers are currently licensed.

Sessions offer specialized guidance on various ServiceNow product topics, aimed at accelerating value realization and outcomes on the ServiceNow Platform.

Note: Impact squad members may determine that an Access to Experts Accelerator is to be requested based on the information submitted in the Access to Expertise initiative. The Accelerator is not available to be requested by customers outside of the Initiative.

Requestable topics

The Access to Experts Accelerator applies to a selected set of requestable topics:

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- Leading Practices:
  - Obtain prescriptive insights into ServiceNow product-specific leading practice guidelines for a chosen subject.
  - Aides in a deeper understanding of effective methodologies, approaches, and standards for optimal outcomes.
- Technical How-To:
  - Schedule personalized one-on-one sessions with ServiceNow experts.
  - Address specific technical inquiries and receive prescriptive guidance.
- Product Capability Overview: Designed for customers who have already licensed the product (post-sales), this session offers a high-level overview of specific product capabilities. It features an out-of-the-box walkthrough using demonstration data to showcase key features and foundational concepts.

For examples of requests or additional information on the request process, see Request Access to Expertise.

This feature is available for packages such as Impact Advanced and Impact Total along with the Impact Guided package and Strategic Value or Platform Governance, as add-on.

What You Get

Important: Impact customers must provide sufficient detail and context related to the requested topic at least one week in advance of the session to allow the#ServiceNow #Request Owner to prepare.

Session Preparation

ServiceNow #Impact Accelerator consultant evaluates the request and may gather additional information and assets based on the question submission.

Access to Experts Customer Session (variable time allotment based on request)

A ServiceNow subject matter expert (SME) will be assigned and perform the following:

- Directly meet with the Impact customer addressing their request
- Provide relevant assets addressing the request

Follow-up

Access to the ServiceNow subject matter expert will be provided for 10 business days following the session. The ServiceNow SME determines if additional follow-up is required to conclude the Access to Experts request.

Requested Customer Resources

x

Customer Resource	Responsibilities	Required	Recommended
Platform Owner	Responsible for the overall accountability of the ServiceNow platform. Provides leadership and oversight to the	#	

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x (continued)

Customer Resource	Responsibilities	Required	Recommended
	System Administrators, ensures team alignment to business strategy and the ServiceNow roadmap, and is actively involved in the overarching governance of the platform.		
Platform Administrator	Responsible for the day-to-day administration of the ServiceNow platform.	#	
Enterprise Architect Lead	Responsible for overall enterprise architecture, strategy, and governance.	#	
Technical Architect Lead	Responsible for overall technical architecture.	#	
Application Owner	Ensures that the program or programs, which make up the application, accomplish the specified objective or set of user requirements established for that application, including appropriate security safeguards.	#	
System Administrator(s)	Maintains the stability and usability of the ServiceNow platform by performing application maintenance, managing support for cases related to ServiceNow applications, and contributing to ServiceNow software releases by delivering configuration tasks and features.	#	
Enterprise Architect(s)	Provides a holistic view of the organization's strategy, processes, and other systems, including any necessary policy or organizational requirements. Helps guide the Platform Owner		#

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x (continued)

Customer Resource	Responsibilities	Required	Recommended
	to align with technical or functional standards.		
Developer(s)	Writes code for the ServiceNow platform.		#
Subject Matter Expert(s)	Provides expert level support across the program to the functional leads and their teams in the areas of reporting, dashboards, automation, and configurations for the Incident, Configuration, Problem, Knowledge Management, and Service Requests.		#

Delivery Parameters

- Product Capability Overview: It provides a high-level overview of specific product capabilities and their key features. For example, it may explain how the Change Management module works and highlight how emergency changes are handled within the system.
- Eligibility Restrictions: Expertise and guidance are provided exclusively on ServiceNow Platform and product topics for which Impact customers are currently licensed. Requests pertaining to unlicensed topics are redirected to the Account Team for appropriate handling.
- Customer Consent and Boundaries: All activities strictly adhere to advisory roles. Customer consent isn't required for this Accelerator. ServiceNow resources won't access customer instances or perform code review, instance copy, or direct keyboard interactions.
- Remote Operation and Scope: No on-premise travel, named resources, or predefined scheduling commitments. If additional time outside of the follow-up period is needed, a new session will be requested.

Requested Information / Access

The#Impact Accelerator consultant may request additional information prior to the customer session and may also provide additional guidance in follow-up after the customer session.

The intake questionnaire is to be completed at least one week in advance of the customer's session.

Exclusions

This Accelerator doesn't include:

- Resolution of active support cases.
- Guidance on customizations, integrations, or enterprise-level solutions (e.g., Service Mapping) for licensed products.
- On-site workshops or in-person engagements.
- Instance access, code review, instance copying, direct keyboard interactions, or support for topics outside of the Impact Customer's current licenses.

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- Administration, configuration, and customization of customer instance(s).
- Replacement of other existing Impact Accelerators is available to Impact Customers, which may be more aligned with resolution.
- Product Capability Overview:
  - To comply with legal, regulatory, and privacy requirements, ServiceNow uses only demonstration data during Product Capability Overview sessions and does not present or share any live customer data. Furthermore, as external systems are not accessible during these sessions, demonstrations involving product integrations are outside the scope of delivery.
  - Full module demos are not included in this session. These types of demos are typically designed for customers who are not yet licensed and are created by Pre-Sales teams where they showcase specific customer use cases and workflows, often covering multiple areas of the platform.

Extend Your AI Search

This accelerator provides prescriptive guidance on extending your AI Search beyond the foundational level.

Accelerator Overview

Extend your AI Search provides Impact customers with advanced tools and insights to extend their AI Search capabilities beyond the foundational level. This offering explores advanced configuration options, enabling customers to greatly enhance the reach and performance of AI Search across their instance stack. This Accelerator also includes key resources and leading practice guides to optimize implementation and drive increased usage.

Note: This Accelerator is available for Impact Guided, Guided+ (SV or PG), Advanced, and Total packages.

What You Get

Session Preparation

- Provision a temporary instance
- If applicable, activate and configure related plug-ins

Customer Coaching Session #1 (Up to 90 minutes)

Includes the following:

- Overview of advanced AI Search capabilities and features
- Applied demonstration of:
  - AI Search for Next Experience
  - Service Operations Workspace (SOW) Recommendations
  - Natural Language Query (NLQ) Genius Results
  - Genuis Result Configuration
  - Custom Table Configuration
- Temporary instance with 30 days provided access
- Leading practice guides and resources

Customer Coaching Session #2 (optional on Customer request for up to 60 min)

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Opportunity for Q&A related to advanced AI Search capabilities

Requested Customer Resources

Customer Resource	Responsibilities
Platform Owner- Required	Responsible for the overall accountability of the ServiceNow platform. Provides leadership and oversight to the System Administrators, ensures team alignment to business strategy and the ServiceNow roadmap, and is actively involved in the overarching governance of the platform.
System Administrator(s) - Required	Maintains the stability and usability of the ServiceNow platform by performing application maintenance, managing support for cases related to ServiceNow applications, and contributing to ServiceNow software releases by delivering configuration tasks and features.
Process Owner(s)-Required	A senior leader within each business unit for each major process or service, (for example, incident, change, employee onboarding) who is accountable for ensuring the process is fit for purpose.
Developer(s)-Recommended	Writes code for the ServiceNow platform.
Process Lead(s)-Recommended	Subject matter expert responsible for managing the applicable process.
Service Manager(s)-Recommended	Subject matter expert responsible for managing the applicable service.
Trusted Service Partners - Recommended	Attends ServiceNow Impact Accelerator coaching session(s) to understand leading practices and potentially support customer going forward.

Requested information / access

Refer to the applicable Impact Accelerator description available at https://www.servicenow.com/legal/servicenow-impact.html

Exclusions

This Impact Accelerator in its entirety or portions of the Impact Accelerator activities may not be available to customers in certain restricted environments, to self-hosted customers, or to managed service providers with domain separated instances.

ServiceNow is not responsible for implementing recommendations on Customer's non-production or production instances.

Extend Your Employee Center to Pro

The Extend Your Employee Center to Pro Accelerator provides prescriptive guidance on extending the Employee Center capabilities to include Pro features.

Overview

Extend Your Employee Center to Pro provides Impact customers with guidance on how to extend #their current Employee Center implementation with#Employee Center Pro features. Through an overview of Employee Center Pro features, such as Content Experiences, Publishing, and

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Employee Communications, customers are#educated on the features available with Employee Center Pro.

Additionally, this Accelerator equips our customers with essential ServiceNow resources and leading#practice guides on how to best increase adoption and usage of the Employee Center Pro capabilities.#For additional information, see Exploring Employee Center Pro.

Note: This Accelerator is available for Impact Guided, Advanced, and Total packages.

Offered pursuant to the applicable ServiceNow Impact Package and Accelerator descriptions available at https://www.servicenow.com/legal/servicenow-impact.html.

What You Get

Session Preparation

- Provision a temporary instance
- Activate Employee Center Pro plugins

Customer Coaching Session #1 (Up to 90 minutes)

Includes the following:

- Overview of Employee Center Pro capabilities
- Review of key administrative settings
- Discuss key maintenance activities
- Leading practice guides and resources
- 30 days of access to the temporary instance is provided

Customer Coaching Session #2 (Optional upon Customer request - up to 60 minutes)

Opportunity for Q&A related to Employee Center Pro

Request Customer Resources

Customer Resource	Responsibilities
Platform Owner (Required)	Responsible for the overall accountability of the ServiceNow platform. Provides leadership and oversight to the System Administrators, ensures team alignment to business strategy and the ServiceNow roadmap, and is actively involved in the overarching governance of the platform.
System Administrator(s) (Required)	Maintains the stability and usability of the ServiceNow platform by performing application maintenance, managing support for cases related to ServiceNow applications, and contributing to ServiceNow software releases by delivering configuration tasks and features.
UX and OCM Experts (Recommended)	Primary stakeholders for user experience and organizational change management.
Developer(s) (Recommended)	Writes code for the ServiceNow platform.

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Customer Resource	Responsibilities
Other Customer Roles (Recommended)	Primary stakeholders responsible for employee experience and engagement, including Knowledge, Portal, and Catalog Managers.
Trusted Service Partners (Recommended)	Attends ServiceNow Impact Accelerator coaching session(s) to understand leading practices and potentially support customer going forward.

Requested information / access

Refer to the applicable Impact Accelerator description available at https://www.servicenow.com/legal/servicenow-impact.html

Exclusions

This Impact Accelerator in its entirety or portions of the Impact Accelerator Activities may not be available to customers in certain restricted environments, to self-hosted customers, or to managed service providers, except for their internal #use.

ServiceNow resources are not responsible for recommendations on a customer's sub-production or production instances.

Health Assessment – Guided

The Health Assessment-Guided Accelerator provides an insight into your ServiceNow instance health.

Accelerator Overview

Health Assessment- Guided provides Impact Guided Customers with a technical analysis of their ServiceNow instance health via HealthScan, as well as guidance on how to interpret the findings. It aims to help you understand how your instance aligns to leading practices and recommendations on how to improve instance health.

What You Get

Instance Assessment

Instance assessment using ServiceNow HealthScan.

Customer Coaching Session #1 (up to 90 minutes)

Review of:

- How to interpret HealthScan findings
- Detailed findings from HealthScan Scorecard

Customer Coaching Session #2 (Optional upon Customer request – up to 60 minutes)

- Opportunity for Q&A related to HealthScan findings
- Provide additional guidance on leading practices, as needed

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Requested Customer Resources

Customer resource and responsibilities

Customer Resource	Responsibilities	Required	Recommended
Platform Owner	Responsible for the project, meet with the ServiceNow Impact Accelerator Consultant, provide access to the required resources, and drive the actions from the review.	#	
System Administrator (s)	Responsible for maintenance and configuration of the ServiceNow platform. Meet with the ServiceNow Impact Accelerator Consultant and provide feedback on challenges and pain points of the ServiceNow environment.		#
Service Owners	Responsible for overall ownership and day-to-day activities of the ServiceNow instance. Meet with the ServiceNow Impact Accelerator Consultant and provide feedback on challenges and pain points of the ServiceNow environment.	#	
System Developers	Responsible for development activities on the ServiceNow platform. Meet with the ServiceNow Impact Accelerator Consultant and provide feedback on challenges and pain points to the ServiceNow environment	#	

Requested Information / Access

Please refer to the applicable Impact Accelerator Description available at https://www.servicenow.com/legal/servicenow-impact.html

Exceptions

Certain Impact Accelerator Activities may be limited or unavailable for customers in the FedRAMP, NSC DOD IL5, or Australia IRAP-Protected data centers, to self-hosted customers, or in other restricted environments.

Note that reviews of design, process, strategy, governance and pre-production testing are excluded. Implementation of any recommended activities resulting from Health Assessment, such as any findings or recommendations in the Review Report are excluded.

Introduction to CMDB: Ingestion

This accelerator provides a demonstration of the possibilities and capabilities of automating and standardizing CMDB data entry.

Accelerator Overview

Introduction to CMDB: Ingestion provides Impact customers with a comprehensive overview and demonstration of how to standardize input sources for their Configuration Management Database (CMDB). This offering covers core functionality for obtaining and importing data,

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providing a clear understanding of the various methods to populate CMDB tables within a ServiceNow instance. This Accelerator also includes key resources and leading practice guides to help customers get started.

The focus of this session is on Service Graph Connectors. Additional methods of population such as via Discovery or Agent Client Collector (ACC) are not deeply explored within this accelerator.

Note: This Accelerator is available for Impact Guided, Guided+ (SV or PG), Advanced, and Total packages.

What You Get

Session Preparation

- Provision a ServiceNow demonstration instance
- Activate and configure related plug-ins

Customer Coaching Session #1 (Up to 90 minutes)

Includes the following:

- Overview and demonstration of:
  - Service Graph Connectors
  - CMDB Population via Integration Hub Spoke
  - Import sets
- Leading practice guides and resources

Customer Coaching Session #2 (optional on Customer request for up to 60 min)

Opportunity for Q&A related to CMDB Ingestion

Requested Customer Resources

Customer Resource	Responsibilities
Platform Owner- Required	Responsible for the overall accountability of the ServiceNow platform. Provides leadership and oversight to the System Administrators, ensures team alignment to business strategy and the ServiceNow roadmap, and is actively involved in the overarching governance of the platform.
System Administrator(s) - Required	Maintains the stability and usability of the ServiceNow platform by performing application maintenance, managing support for cases related to ServiceNow applications, and contributing to ServiceNow software releases by delivering configuration tasks and features.
Process Owner(s)-Required	A senior leader within each business unit for each major process or service, (for example, incident, change, employee onboarding) who is accountable for ensuring the process is fit for purpose.
Developer(s)-Recommended	Writes code for the ServiceNow platform.

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Customer Resource	Responsibilities
CMDB Administrator(s)-Recommended	Maintains the stability and usability of the ServiceNow platform by performing application maintenance specifically within the CMDB.
Data Source Owner(s)-Recommended	Data source/silo key resource who commonly works to bring information from another tool into ServiceNow CMDB.
Trusted Service Partners - Recommended	Attends ServiceNow Impact Accelerator coaching session(s) to understand leading practices and potentially support customer going forward.

Requested information / access

Refer to the applicable Impact Accelerator description available at https://www.servicenow.com/legal/servicenow-impact.html

Exclusions

This Impact Accelerator in its entirety or portions of the Impact Accelerator activities may not be available to customers in certain restricted environments, to self-hosted customers, or to managed service providers with domain separated instances.

ServiceNow is not responsible for implementing recommendations on Customer's non-production or production instances.

Introduction to Instance Observer-Guided

The Introduction to Instance Observer Accelerator provides guidance on understanding and monitoring performance using Instance Observer.

Accelerator overview

Introduction to Instance Observer provides Impact Guided customers with an overview of Instance Observer, a review of specific telemetry for instance availability, prescriptive guidance on visible trends, and leading practices on monitoring your ServiceNow platform. See Overview of Instance Observer for more information on the feature.

Note: This Accelerator is available for the Impact Guided package.

What You Get

Session Preparation

Assess customer's Instance Observer data

Customer Coaching Session #1 (Up to 60 minutes)

Includes the following:

- Overview of Instance Observer
- Review#specific telemetry and instance#availability
- Highlight and review visible trends
- Provide leading practices for monitoring#nstance performance

Customer Coaching Session #2 (Optional upon Customer request - up to 60 minutes)

Opportunity for Q&A related to Instance Observer.

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Requested Customer Resources

Customer resource and responsibilities

Customer Resource	Responsibilities
Platform Owner (Required)	Responsible for the overall accountability of the ServiceNow platform. Provides leadership and oversight to the System Administrators, ensures team alignment to business strategy and the ServiceNow roadmap, and is actively involved in the overarching governance of the platform.
System Administrator(s) (Required)	Maintains the stability and usability of the ServiceNow platform by performing application maintenance, managing support for cases related to ServiceNow applications, and contributing to ServiceNow software releases by delivering configuration tasks and features.
Developer(s) (Recommended)	Writes code for the ServiceNow platform.

Exceptions

This Impact Accelerator in its entirety or portions of the Impact Accelerator Activities may not be available to customers in the FedRAMP, NSC DOD IL5, or Australia IRAP-Protected data centers, to self-hosted customers, or in other restricted environments, or to managed service providers (except for their internal#use).

Introduction to Instance Readiness Assessment

The Introduction to Instance Readiness Assessment Accelerator provides guidance on understanding and interpreting instance readiness using the Instance Readiness Assessment (IRA).

Accelerator overview

Introduction to Instance Readiness Assessment provides Impact customers with an overview of Instance Readiness Assessment.#This proactive approach helps you effectively address issues by guiding you on interpreting findings to enhance instance readiness. This Accelerator highlights the results of the Instance Readiness Assessment, providing key resources and leading#practices for getting started.

Note: This Accelerator is available for the Impact Guided package.

What you get

Session preparation

- Run the Instance Readiness Assessment
- Review Instance Observer related metrics

Customer coaching session #1 (up to 60 minutes)

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Includes the following:

- Overview of the Instance Readiness Assessment
- Review of the assessment results
- Key resources and leading practices guides

Customer coaching session #2 (optional upon customer request, up to 60 minutes)

Opportunity for Q&A related to the Instance Readiness Assessment

Requested customer resources

One or more customer resource is requested. The specific number of resources provided is Accelerator and customer specific.

Customer resource and responsibilities

Customer resource	Responsibilities	Required	Optional
Platform Owner	Responsible for the overall accountability of the ServiceNow platform. Provides leadership and oversight to the System Administrators, ensures team alignment to business strategy and the ServiceNow roadmap, and is actively involved in the overarching governance of the platform.	#	
System Administrators	Maintains the stability and usability of the ServiceNow platform by performing application maintenance, managing support for cases related to ServiceNow applications, and contributing to ServiceNow software releases by delivering configuration tasks and features.	#	
Trusted Service Partners	Attends ServiceNow Impact Accelerator coaching session(s) to understand leading practices and potentially support customer going forward.		#

Exclusions

This Impact Accelerator in its entirety or portions of the Impact Accelerator activities may not be available to customers in certain restricted environments, to self-hosted customers, or to managed service providers with domain separated instances.

ServiceNow resources are not responsible for implementing recommendations on the customer's sub-production or production instances.

Jumpstart Your AI Control Tower

This accelerator provides a demonstration of the possibilities and capabilities of ServiceNow's AI Control Tower.

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Accelerator Overview

Jumpstart Your AI Control Tower introduces Impact customers to ServiceNow's AI Control Tower. Through an applied demonstration, customers will gain a clear understanding of how it supports AI governance, helping them improve oversight and closely track their AI investments. This accelerator includes key resources and leading practice guides, enabling customers to leave feeling confident in their ability to govern AI initiatives effectively.

Note: This Accelerator is available for Impact#Guided, Guided+ (Strategic Value or Platform Governance), Advanced, and Total packages

What You Get

Session Preparation

- Provision of a temporary instance (if applicable)
- Activation and configuration of related plug-ins
- Configuration of AI Control Tower

Customer Coaching Session #1#(up to 90 min)

Includes the following:

- Overview of AI Control Tower & Related Roles
- End User demonstration
- Technical Demonstration
- Walk-through of ServiceNow’s AI Control Tower life cycle workflow
- Temporary instance provided with 30 days access
- Leading practices guides and resources

Customer Coaching Session #2#(Optional upon Customer requests-up to 60 min)

Opportunity for Q&A related to ServiceNow's AI Control Tower

Requested Customer Resources

Customer resource and responsibilities

Customer Resource	Responsibilities	Required	Recommend
Platform Owner	Responsible for the overall accountability of the ServiceNow platform. Provides leadership and oversight to the System Administrators, ensures team alignment to business strategy and the ServiceNow roadmap, and actively involves in the overarching governance of the platform.	#	
System Administrator(s)	Responsible for maintaining the stability and usability of the ServiceNow platform by performing application maintenance, managing support for Cases related to ServiceNow applications, and contributing to ServiceNow software releases by delivering configuration tasks and features.	#	

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Customer resource and responsibilities (continued)

Customer Resource	Responsibilities	Required	Recommend
Subject Matter Expert(s)	Subject matter expert responsible for managing risks across the AI lifecycle and ensuring that AI assets comply with regulations, industry standards, and governance frameworks.		#
Developer(s)	Writes code for the ServiceNow platform.		#
Trusted Service Partners	Attends ServiceNow Impact Accelerator coaching session(s) to understand leading practices and potentially support customer going forward.		#

Requested Information/Access

Requested Information/Access

Note: Additional details on supplemental legal terms, prerequisites, specifications, requirements, and exclusions can be found in the Impact Accelerator Terms Matrix.

Jumpstart Your AI Search

This Accelerator provides guidance on enabling and configuring AI Search.

Accelerator Overview

Jumpstart Your AI Search provides Impact customers with an introduction to AI Search, a demonstration of features and performance via a temporary cloned#nstance, and leading practices on getting started. It aims to enable you to enhance your end-users' experiences by empowering them to find the information#hey need when and where they need it.

Note: This Accelerator is available for Impact Guided, Advanced, and Total packages.

Offered pursuant to the applicable Impact Accelerator Description available at#https://www.servicenow.com/legal/servicenow-impact.html

What You Get

AI Search Assessment

- Provisioning of temporary instance
- Enabling and configuring of AI Search and related tools
- Analysis of AI Search performance

Customer Coaching Session #1 (Up to 90 minutes)

Review of

- What is AI Search
- Review of setup process
- Demonstration of AI Search capabilities
- Leading practice recommendations

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- Reporting/Analytic overview
- Key resources and guides

Customer Coaching Session #2 (Optional upon Customer request, up to 60 minutes)

Review of

- Opportunity for Q&A related to AI Search
- Provide additional guidance on implementation resources and process, plugins, and findings

Requested Customer Resources

Customer resource and responsibilities

Customer Resource	Responsibilities
Platform Owner- Required	Responsible for the overall accountability of the ServiceNow platform. Provides leadership and oversight to the System Administrators, ensures team alignment to business strategy and the ServiceNow roadmap, and is actively involved in the overarching governance of the platform.
System Administrator- Required	Maintains the stability and usability of the ServiceNow platform by performing application maintenance, managing support for cases related to ServiceNow applications, and contributing to ServiceNow software releases by delivering configuration tasks R and features.
ITSM Virtual Agent Lead- Recommended	Subject matter expert responsible for ServiceNow ITSM Virtual Agent.
Developers- Recommended	Writes code for the ServiceNow platform.

Requested Information

Please refer to the applicable Impact Accelerator Description available at https://www.servicenow.com/legal/servicenow-impact.html

Exceptions

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ServiceNow is not responsible for implementing AI Search recommendations on Customer's sub-production or production instances.

Jumpstart Your AI Agent Studio

This accelerator provides Impact customers with an overview and applied demonstration of AI agents within the Platform.

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Jumpstart Your AI Agent Studio Overview

Jumpstart Your AI Agent Studio highlights how AI agents empower customers to build an ecosystem of autonomous or Human-on-the-loop (HOTL) Agents equipped with tools that integrate seamlessly across the platform and beyond. These Agents are orchestrated to perform a wide range of tasks with minimal to no human intervention, significantly enhancing organizational efficiency and demonstrating the transformative potential of AI. The offering includes key resources and leading practices guides to help customers get started with ServiceNow AI Agents.

Note: This Accelerator is available for Impact Guided, Guided+ (SV or PG), Advanced, and Total packages.

What you get

Session preparation

- Provision a temporary instance
- Activate and configure related plug-ins
- Configure a custom AI agent

Customer coaching session #1 (up to 90 minutes)

Includes the following:

- Overview of:
  - AI agents: What value do they bring?
  - TapeAgents framework
  - AI Agent Studio
- End-user experience demo
- Technical demo
- Review reporting options
- Temporary instance with 30 days of access

Customer coaching session #2 (optional upon customer request, up to 60 minutes)

Opportunity for Q&A related to ServiceNow AI Agents

Requested customer resources

Customer resource and responsibilities

Customer resource	Responsibilities
Platform Owner (Required)	Responsible for the overall accountability of the ServiceNow platform. Leads and oversees the System Administrators, ensures team alignment to business strategy and the ServiceNow roadmap, and is actively involved in the overarching governance of the platform.
System Administrators (Required)	Maintains the stability and usability of the ServiceNow by performing application maintenance, managing support for cases related to ServiceNow applications,

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Customer resource and responsibilities (continued)

Customer resource	Responsibilities
	and contributing to ServiceNow software releases by delivering configuration tasks and features.
Process Owners (Required)	A senior leader within each business unit for each major process or service such as incident, change, and employee onboarding, who ensures the process is fit for the purpose.
Developers (Recommended)	Writes code for the ServiceNow platform.
Trusted Service Partners (Recommended)	Attends one or more ServiceNow Impact Accelerator coaching sessions to understand leading practices and support customers.

Requested information/access

Please refer to the applicable Impact Accelerator Description available at https://www.servicenow.com/upgrade-schedules.html

Exclusions

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ServiceNow is not responsible for implementing recommendations on Customer's sub-production or production instances.

Jumpstart Your AI Agents for CSM

This Accelerator provides a demonstration of the possibilities and capabilities of AI Agents for CSM.

Accelerator overview

This accelerator provides#mpact customers with an overview and applied demonstration of AI Agents for CSM. By harnessing the power of GenAI, this accelerator highlights how AI agents revolutionize the CSM process by using advanced reasoning to complete key tasks. AI agents handle repetitive tasks such as generating detailed resolution notes, summarizing cases and chat conversations, and more, freeing up human agents to focus on higher-value work.#This offering provides key resources and leading practices to get started with AI Agents for CSM.

Note: This Accelerator is available for Impact Guided, Guided+ (SV or PG), Advanced, and Total packages.

What you get

Session preparation

- Provision a temporary instance
- Activate related plug-ins
- Activate and configure AI Agents

Customer coaching session #1 (up to 90 minutes)

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Includes the following:

- Overview of base system AI Agents for CSM features
- Applied demonstration of:
  - Base system AI Agents for CSM experiences
  - Customization of Case Summarization Skill
  - Now Assist Usage Metrics for CSM
- Key resources and guides on leading practices
- 30 days access to the temporary instance is provided

Customer coaching session #2 (optional upon customer request, up to 60 minutes)

Opportunity for Q&A related to AI Agents for CSM.

Requested customer resources

One or more customer resource is requested. The specific number of resources provided is Accelerator and customer specific.

Customer resource and responsibilities

Customer resource	Responsibilities
Platform Owner (Required)	Responsible for the overall accountability of the ServiceNow platform. Leads the System Administrators, ensures team alignment with the ServiceNow business strategy and roadmap, and contributes to platform governance.
System Administrator(s) (Required)	Maintains the stability and usability of the ServiceNow by performing application maintenance, managing support for cases related to ServiceNow applications, and contributing to ServiceNow software releases by delivering configuration tasks and features.
Customer Service Manager (Recommended)	Responsible for managing case workers. Provides insights into the impact of different AI Agents Skills on the current state.
Trusted Service Partners (Recommended)	Attends ServiceNow Impact Accelerator coaching session(s) to understand leading practices and potentially support customer going forward.

Requested information/access

Please refer to the applicable Impact Accelerator Description available at https://www.servicenow.com/upgrade-schedules.html

Exclusions

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Jumpstart Your AI Agents for ITSM

This accelerator provides a demonstration of the possibilities and capabilities of AI Agents for ITSM.

Accelerator overview

Jumpstart Your AI Agents for ITSM provides#mpact customers with an overview and applied demonstration of AI Agents for ITSM. By harnessing the power of GenAI, this accelerator highlights how AI agents revolutionize the ITSM process by using advanced reasoning to complete key tasks. AI agents handle repetitive tasks such as generating detailed resolution notes, summarizing cases and chat conversations, and more, freeing up human agents to focus on higher-value work.#This offering provides key resources and leading practices to get started with AI Agents for ITSM.

Note: This Accelerator is available for Impact Guided, Guided+ (SV or PG), Advanced, and Total packages.

What you get

Session preparation

- Provision a temporary instance
- Activate related plug-ins
- Activate AI Agent use cases

Customer coaching session #1 (up to 90 minutes)

Includes the following:

- Overview of AI Agents for ITSM features
- Applied demonstration of AI Agents for ITSM
- Technical demonstration on how to enable the demonstrated capabilities
- Key resources and guides on leading practices
- 30 days access to the temporary instance

Customer coaching session #2 (optional on customer request, up to 60 minutes)

Opportunity for Q&A related to AI Agents for ITSM.

Requested customer resources

One or more customer resource are requested. The specific number of resources provided is Accelerator and customer specific.

Customer resource and responsibilities

Customer resource	Responsibilities
Platform Owner (Required)	Responsible for the overall accountability of the ServiceNow platform. Leads the System Administrators, ensures team alignment with the ServiceNow business strategy and roadmap, and contributes to platform governance.
System Administrator (Required)	Maintains the stability and usability of the ServiceNow by performing application maintenance, managing

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Customer resource and responsibilities (continued)

Customer resource	Responsibilities
	support for cases related to ServiceNow applications, contributing to ServiceNow software releases by delivering configuration tasks and features.
Service Desk Manager (Recommended)	Subject matter expert responsible for managing Service Desk.
Trusted Service Partners (Recommended)	Attends ServiceNow Impact Accelerator coaching sessions to understand leading practices and potentially support customer going forward.

Requested information/access

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Exclusions

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ServiceNow is not responsible for implementing recommendations on Customer's non-production or production instances.

Jumpstart Your App Engine

Prescriptive guidance on enabling Citizen Development and utilizing App Engine Studio

Overview

Jumpstart Your App Engine provides Impact customers with an introduction to Citizen Development and how to empower users to develop applications on the ServiceNow platform. It includes an applied demonstration on using App Engine Studio (AES) and App Engine Management Center, a guided tour of its features and benefits via a temporary cloned instance, and leading practices on getting started.

Offered pursuant to the applicable Impact Accelerator Description available at Impact Upgrade Schedules.

What You Get

App Engine Setup

- Provisioning temporary instance(s)
- Activating and configuring of App Engine Studio and related tools

Customer Coaching Session #1 (up to 90 min)

Review of:

- What is Low-code/No-code Citizen Development
- Demonstration of App Engine Studio capabilities
- App Engine Management Center demo

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- Review of App Engine technical overview
- Review of App Engine Management Center governance
- Leading practice recommendations
- Key resources and guides
- Thirty days of access to the temporary instances and the Technical Consultant

Customer Coaching Session #2 (Optional upon Customer request- up to 60 min)

Opportunity for Q&A related to App Engine

Request Customer Resources

Customer resource and responsibilities

Customer Resource	Responsibilities
Platform Owner- Required	Responsible for the overall accountability of the ServiceNow platform. Provides leadership and oversight to the System Administrators, ensures team alignment to business strategy and the ServiceNow roadmap, and is actively involved in the overarching governance of the platform.
System Administrator(s)- Recommended	Maintains the stability and usability of the ServiceNow platform by performing application maintenance, managing support for cases related to ServiceNow applications, and contributing to ServiceNow software releases by delivering configuration tasks and features.
Developer(s)- Recommended	Writes code for the ServiceNow platform.
Subject Matter Expert(s)- Recommended	Non-developers with strong knowledge of processes who are a candidate for Citizen Development.

Requested Information / Access

Please refer to the applicable Impact Accelerator Description available at Impact Upgrade Schedules.

Exceptions

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ServiceNow is not responsible for implementing App Engine recommendations on Customer's sub-production or production instances.

Jumpstart Your Automated Testing

Prescriptive guidance on enabling and utilizing Automated Test Framework

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Overview

Jumpstart Your Automated Testing provides Impact customers with an introduction to Automated Test Framework (ATF) and how it can be leveraged to accelerate upgrades and increase quality. It includes an applied demonstration of leading practices around getting started with ATF as well as its features and benefits via a temporary cloned instance.

Offered pursuant to the applicable Impact Accelerator Description available at Impact Upgrade Schedules.

What You Get

Automated Testing Framework Setup

- Provisioning of a temporary instance
- Enabling and configuring of Automated Test Framework and related tools

Enabling and configuring of Automated Test Framework and related tools

Review of

- Benefits of Automated Test Framework
- Demonstration of Automated Test Framework capabilities
- Overview of Test Generator and Cloud Runner
- Leading practice recommendations
- Key resources and guides
- Thirty days of access to the temporary instance and the Technical Consultant

Customer Coaching Session #2 (Optional upon Customer request- up to 60 min)

Opportunity for Q&A related to Automated Test Framework

Requested Customer Resources

Customer resource and responsibilities

Customer Resource	Responsibilities
Platform Owner- Required	Responsible for the overall accountability of the ServiceNow platform. Provides leadership and oversight to the System Administrators, ensures team alignment to business strategy and the ServiceNow roadmap, and is actively involved in the overarching governance of the platform.
System Administrator(s)- Required	Maintains the stability and usability of the ServiceNow platform by performing application maintenance, managing support for cases related to ServiceNow applications, and contributing to ServiceNow software releases by delivering configuration tasks and features.
Upgrade Lead- Recommended	Meets with the ServiceNow Impact Accelerator Consultant, provides access to the required

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Customer resource and responsibilities (continued)

Customer Resource	Responsibilities
	resources, and drives the actions from the engagement.

Requested Information/Access

Please refer to the applicable Impact Accelerator Description available at Impact Upgrade Schedules.

Exceptions

This Impact Accelerator in its entirety or portions of the Impact Accelerator Activities may not be available to customers in the FedRAMP, NSC DOD IL5, or Australia IRAP-Protected data centers, to self-hosted customers, or in other restricted environments, or to managed service providers (except for their internal use).

ServiceNow is not responsible for implementing Automated Test Framework recommendations on Customer's sub-production or production instances.

Jumpstart Your CMDB

The Jumpstart Your Configuration Management Database (CMDB) Accelerator provides a demonstration of the possibilities and capabilities of CMDB.

Overview

Jumpstart Your CMDB provides Impact customers with a comprehensive overview of platform CMDB capabilities to ensure customers have a sound understanding of CMDB fundamentals and a strategic plan for success. Our goal is to place customers in a position for success from the very start, enabling you to create a strategy for leveraging ServiceNow resources. Resources include the CMDB Workspace, CI Class Manager, and Reconciliation rules to streamline working in your CMDB. See Configuration Management for information on CMDB.

Note: This Accelerator is available for Impact Guided, Advanced, and Total packages.

Offered pursuant to the applicable ServiceNow Impact Package and Accelerator descriptions available at https://www.servicenow.com/legal/servicenow-impact.html.

What you get

Session Preparation

- Provisioning of a temporary instance
- Install or update necessary CMDB related plugins

Customer Coaching Session #1 (up to 90 min)

Includes the following:

- Overview and demonstrate CMDB
- Review of the functionality of CMDB tools:
  - CMDB workspace
  - Identification Reconciliation Engine

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- CMDB Data Manager
- CMDB health dashboards

- Temporary instance with 30 days granted access

Customer Coaching Session #2 (Optional upon Customer request – up to 60 min)

Opportunity for Q&A related to CMDB

Requested customer resources

Customer resource and responsibilities

Customer Resource	Responsibilities
Platform Owner (Required)	Responsible for the overall accountability of the ServiceNow platform. Provides leadership and oversight to the System Administrators, ensures team alignment to business strategy and the ServiceNow roadmap, and is actively involved in the overarching governance of the platform.
System Administrator(s) (Required)	Maintains the stability and usability of the ServiceNow platform by performing application maintenance, managing support for cases related to ServiceNow applications, and contributing to ServiceNow software releases by delivering configuration tasks and features.
Process Owner(s) (Required)	A senior leader within each business unit for each major process or service (e.g., incident, change, employee onboarding) who is accountable for ensuring the process is fit for purpose.
Developer(s) (Recommended)	Writes code for the ServiceNow platform.
Trusted Service Partners (Recommended)	Attends ServiceNow Impact Accelerator coaching session(s) to understand leading practices and potentially support customer going forward.

Requested information / access

Refer to the applicable Impact Accelerator description available at https://www.servicenow.com/legal/servicenow-impact.html

Exceptions

This Impact Accelerator in its entirety or portions of the Impact Accelerator Activities may not be available to customers in the FedRAMP, NSC DOD IL5, or Australia IRAP-Protected data centers, to self-hosted customers, or in other restricted environments.

ServiceNow is not responsible for implementing any of the recommended CMDB configuration changes in Customer's sub-production or production instances.

Jumpstart Your CSDM: Crawl

This accelerator provides an overview of the Crawl phase of the CSDM maturity journey, brief assessment of current Crawl data, and actionable steps to complete the phase.

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Accelerator Overview

Jumpstart Your CSDM: Crawl provides impact customers with an overview and applied demonstration of the Common Service Data Model (CSDM) Crawl phase. This accelerator supports the customer's CSDM maturity journey by breaking down specific action items to enhance understanding of the Crawl phase. As a result, customers can populate and rationalize their Business applications and Application services. This enables a more service-aware CMDB for use throughout additional workflows of ServiceNow.The offering also includes key resources and leading practice guides to help customers get started with the Crawl phase of the CSDM Maturity journey.

Customers must first complete the Jumpstart Your CSDM: Foundation accelerator before taking this one, as this offering builds on the Foundation phase of the CSDM maturity journey.

Note: This Accelerator is only available for Impact Guided and Guided+ packages.

What you get

Session Preparation

- Provision a temporary instance
- Activate and configure related plugins

Customer Coaching Session #1 (up to 90 min)

Includes the following:

- Introduction to Business Applications and Application Services with an overview of their relationships and references
- Brief assessment of Crawl data using the CSDM Data Foundations Dashboard
- Temporary instance with 30 days access

Customer Coaching Session #2 (Optional upon Customer request – up to 60 min)

Opportunity for Q&A related to the CSDM Crawl phase.

Requested customer resources

Customer Resource	Responsibilities		
Platform Owner	Responsible for the overall accountability of the ServiceNow platform. Provides leadership and oversight to the System Administrators, ensures team alignment to business strategy and the ServiceNow roadmap, and is actively involved in the overarching governance of the platform.	#	
CMDB / CSDM Administrator	Maintains the stability and usability of the ServiceNow platform by performing application maintenance, focuses on on-going and remediation efforts within CMDB/CSDM.	#	
System Administrator(s)	Maintains the stability and usability of the ServiceNow platform by performing	#	

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Customer Resource	Responsibilities		
	application maintenance, managing support for cases related to ServiceNow applications, and contributing to ServiceNow software releases by delivering configuration tasks and features.		
Enterprise Architect	Owner of application and business portfolio segments who manages alignment of organizations technology capabilities with their business goals and objectives.		#
Business Application Owner	The owner of any deployed program, module or group of programs, that is designed to provide specific functionality on a computer infrastructure.		#
Trusted Service Partners	Attends ServiceNow Impact Accelerator coaching session(s) to understand leading practices and potentially support customer going forward.		#

Requested information/access

Please refer to the applicable Impact Accelerator Description available at https://www.servicenow.com/upgrade-schedules.html.

Exclusions

This Impact Accelerator in its entirety or portions of the Impact Accelerator activities may not be available to customers in certain restricted environments or to self-hosted customers.

ServiceNow is not responsible for implementing recommendations on Customer's non-production or production instances.

Jumpstart Your CSDM: Foundation

The Jumpstart Your Common Service Data Model (CSDM): Foundation Accelerator provides an overview and breakdown of the CSDM with a focus on Foundation data.

Overview

Jumpstart Your CSDM: Foundation provides Impact customers with an overview of the CSDM in #a comprehensible format.#Through an applied demonstration, we illustrate how organizations can leverage this data framework to#configure ServiceNow products and applications by first populating their data into the appropriate Foundation tables. Additionally, this offering equips our#customers with essential ServiceNow resources and leading practice guides on#how to get started using the CSDM. For more information on CSDM, see Common Service Data Model.

Note: This Accelerator is available for the Impact Guided package.

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What You Get

Session Preparation

- Provision a temporary instance
- Install required CSDM plugins
- Assessment of current CSDM alignment via Instance scan

Customer Coaching Session #1#(up to 90 minutes)

Includes the following:

- Overview of CSDM capabilities with a special focus on the 'Foundation' stage
- Review of the importance of CSDM to the overall platform
- Demonstration of the CSDM Data Foundations Dashboard
- Discussion of assessment results
- Leading practices guides and resources
- 30 days of access to the temporary instance is provided

Customer Coaching Session #2#(Optional upon Customer request - up to 60 minutes)

Opportunity for Q&A related to CSDM Foundation data

Requested Customer Resources

Customer Resource	Responsibilities
Platform Owner (Required)	Responsible for the overall accountability of the ServiceNow platform. Provides leadership and oversight to the System Administrators, ensures team alignment to business strategy and the ServiceNow roadmap, and is actively involved in the overarching governance of the platform.
System Administrator(s) (Required)	Maintains the stability and usability of the ServiceNow platform by performing application maintenance, managing support for cases related to ServiceNow applications, and contributing to ServiceNow software releases by delivering configuration tasks and features.
Application Owner(s) (Recommened)	The owner of any deployed program, module or group of programs, that is designed to provide specific functionality on a computer infrastructure.
ITSM Manager(s) (Recommended)	Responsible for setting SOP's and governance around the IT Service Management operations.
Service Owner(s) (Recommended)	A senior leader within each business unit for each major process or service (for example, incident, change, employee onboarding) who is accountable for ensuring the process is fit for purpose.
Trusted Service Partners (Recommended)	Attends ServiceNow Impact Accelerator coaching session(s) to understand leading practices and potentially support customer going forward.

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Exclusions

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ServiceNow is not responsible for implementing recommendations on a customer's sub-production or production instances.

Jumpstart Your CSM Configurable Workspace

The Jumpstart Your Customer Service Management (CSM) Configurable Workspace Accelerator provides a demonstration of the possibilities and capabilities of the CSM Configurable Workspace.

Accelerator overview

Jumpstart Your (CSM) Configurable Workspace helps Impact customers gain a deeper understanding of how to get started with CSM Configurable Workspace by providing a comprehensive overview and applied#demonstration. This Accelerator guides you through the setup process and clearly illustrates the value of the workspace. Additionally, key resources and leading practices are offered to enhance product adoption and usage.

For additional information on the feature, see CSM Configurable Workspace.

Note: This Accelerator is available for Impact Guided, Advanced, and Total packages.

Offered pursuant to the applicable Impact Accelerator Description available at#https://www.servicenow.com/legal/servicenow-impact.html

What you get

Session preparation

- Provision a temporary instance
- Activate related plugins

Customer coaching session #1 (up to 90 minutes)

Includes the following:

- Overview of CSM Configurable Workspace:
  - History
  - Design reasoning
  - Features
  - Adoption benefits
- Applied demonstration of CSM Configurable Workspace:
  - Installation and updates
  - How to use guided setup
  - Walk through of agent experience
  - Highlight of key features
  - Configuration guidance for admins

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- Key resources and guides on leading practices
- 30 days access to the temporary instance is provided

Customer coaching session #2 (optional upon customer request, up to 60 minutes)

Opportunity for Q&A related to the CSM Configurable Workspace

Requested customer resources

One or more customer resource is requested. The specific number of resources provided is Accelerator and customer specific.

Customer resource and responsibilities

Customer resource	Responsibilities	Required	Optional
Platform Owner	Responsible for the overall accountability of the ServiceNow platform. Provides leadership and oversight to the System Administrators, ensures team alignment to business strategy and the ServiceNow roadmap, and is actively involved in the overarching governance of the platform.	#	
System Administrators	Maintains the stability and usability of the ServiceNow platform by performing application maintenance, managing support for cases related to ServiceNow applications, and contributing to ServiceNow software releases by delivering configuration tasks R and features.	#	
Process owners	A senior leader within each business unit for each major process or service (e.g., customer service, incident) who is accountable for ensuring the process is fit for purpose.	#	
Contact center / Service Desk managers	Subject matter expert responsible for managing Contact Center or Service Desk, agent productivity and customer experience.		#
Other customer roles	Primary stakeholders responsible for agent experience and engagement, including Customer Service Agents, team leaders and User Experience champions.		#
Developers	Makes changes within the ServiceNow platform to meet process requirements		#
Trusted Service Partners	Attends ServiceNow Impact Accelerator coaching session(s) to understand leading practices and potentially support customer going forward.		#

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Exclusions

This Impact Accelerator in its entirety or portions of the Impact Accelerator activities may not be available to customers in certain restricted environments, to self-hosted customers, or to managed service providers with domain separated instances.

ServiceNow resources are not responsible for implementing recommendations on customer's sub-production or production instances.

Jumpstart Your Database Management

The Jumpstart Your Database Management Accelerator provides a demonstration of the possibilities and capabilities of Database Management.

Accelerator overview

Jumpstart Your Database Management provides Impact customers with a comprehensive overview and practical demonstration of effective database management. It focuses on how to properly purge and archive data, initiating discussions on customer database management enablement. This Accelerator demonstrates the possibilities and capabilities of database management and provides key resources and leading practices to help efficiently manage your database footprint and alleviate performance issues.

Note: This Accelerator is available for Impact Guided, Advanced, and Total packages.

Offered pursuant to the applicable Impact Accelerator Description available at#https://www.servicenow.com/legal/servicenow-impact.html

What you get

Session preparation

- Provision a temporary instance
- Activate related plugins
- Review customer database growth report using Instance Observer

Customer coaching session #1 (up to 90 minutes)

Includes the following:

- Overview of database management tools and leading practices:
- Applied demonstration of:
  - Data archiving
  - Table Cleaner
  - Table rotation
  - Cloning
  - Background scripts
- Key resources and guides on leading practices
- 30 days access to the temporary instance is provided

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Customer coaching session #2 (optional upon customer request, up to 60 minutes)

Opportunity for Q&A related to database management

Requested customer resources

One or more customer resource is requested. The specific number of resources provided is Accelerator and customer specific.

Customer resource and responsibilities

Customer resource	Responsibilities	Required	Optional
Platform Owner	Responsible for the overall accountability of the ServiceNow platform. Provides leadership and oversight to the System Administrators, ensures team alignment to business strategy and the ServiceNow roadmap, and is actively involved in the overarching governance of the platform.	#	
System Administrators	Maintains the stability and usability of the ServiceNow platform by performing application maintenance, managing support for cases related to ServiceNow applications, and contributing to ServiceNow software releases by delivering configuration tasks R and features.	#	
Trusted Service Partners	Attends ServiceNow Impact Accelerator coaching session(s) to understand leading practices and potentially support customer going forward.		#

Requested information / access

Refer to the applicable Impact Accelerator description available at https://www.servicenow.com/legal/servicenow-impact.html

Exclusions

This Impact Accelerator in its entirety or portions of the Impact Accelerator activities may not be available to customers in certain restricted environments, to self-hosted customers, or to managed service providers with domain separated instances.

ServiceNow resources are not responsible for implementing recommendations on customer's sub-production or production instances.

Jumpstart Your Employee Center

This accelerator includes a demonstration of the possibilities and capabilities available with the ServiceNow® Employee Center portal in your instance.

Accelerator overview

The Jumpstart Your Employee Center accelerator provides Impact customers with an overview of Employee Center, a unified portal for managers and employees, up-leveling the user experience.

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An applied demonstration of the possibilities and capabilities are shown through a temporary cloned instance with leading practices on implementation, migration, and governance. For additional information, see Employee Center.

Note: This Accelerator is available for Impact Guided, Advanced, and Total packages.

Offered pursuant to the applicable ServiceNow Impact Package and Accelerator descriptions available at https://www.servicenow.com/legal/servicenow-impact.html.

What You Get

Employee Center Setup

- Provision a temporary instance
- Activate and configure Employee Center
- Activate user experience analytics (if applicable)

Customer Coaching Session #1 (up to 60 minutes)

Review of:

- Portal and employee engagement strategy overview
- Demonstration of Employee Center
- Implementation and migration approaches
- Governance and reporting
- Key resources and guides
- Thirty days of access to the temporary instance is provided

Customer Coaching Session #2 (Optional upon Customer request- up to 60 minutes)

Opportunity for Q&A related to Employee Center

Request Customer Resources

Customer resource and responsibilities

Customer Resource	Responsibilities
Platform Owner (Required)	Responsible for the overall accountability of the ServiceNow platform. Provides leadership and oversight to the System Administrators, ensures team alignment to business strategy and the ServiceNow roadmap, and is actively involved in the overarching governance of the platform.
System Administrator(s) (Required)	Maintains the stability and usability of the ServiceNow platform by performing application maintenance, managing support for cases related to ServiceNow applications, and contributing to ServiceNow software releases by delivering configuration tasks and features.
UX and OCM Experts (Recommended)	Primary stakeholders for user experience and organizational change management.

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Customer resource and responsibilities (continued)

Customer Resource	Responsibilities
Other Customer Roles (Recommended)	Primary stakeholders responsible for employee experience and engagement, including Knowledge, Portal, and Catalog Managers.
Developer(s) (Recommended)	Writes code for the ServiceNow platform.
Trusted Service Partners (Recommended)	Attends ServiceNow Impact Accelerator coaching session(s) to understand leading practices and potentially support customer going forward.

Requested information / access

Refer to the applicable Impact Accelerator description available at https://www.servicenow.com/legal/servicenow-impact.html

Exceptions

Certain Impact Accelerator activities may be limited or unavailable for customers in certain restricted environments or Australia IRAP-Protected data centers or to self-hosted customers.

Jumpstart Your Employee Journey Management

The Jumpstart Your Employee Journey Management (EJM) Accelerator provides a demonstration of the possibilities and capabilities of Employee Journey Management.

Accelerator overview

Jumpstart Your Employee Journey Management provides Impact customers with an overview and applied demonstration, helping them to better understand how to begin with Employee Journey Management. This offering showcases EJM capabilities and features, enabling organizations to deliver personalized, cross-departmental Employee Journeys through intelligent workflows that support real-time tasking, learning, and feedback. Additionally, this Accelerator provides key resources and leading-practice guides to enhance product adoption and usage.

Note: This Accelerator is available for Impact Guided, Advanced, and Total packages.

Offered pursuant to the applicable Impact Accelerator Description available at#https://www.servicenow.com/legal/servicenow-impact.html

What you get

Session preparation

- Provision a temporary instance
- Activate and configure Employee Journey Management

Customer coaching session #1 (up to 90 minutes)

Includes the following:

- Review Employee Journey Management capabilities
- Applied demonstration of Employee Journey Management

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- Key resources and guides on leading practices
- 30 days access to the temporary instance is provided

Customer coaching session #2 (optional upon customer request, up to 60 minutes)

Opportunity for Q&A related to Employee Journey Management

Requested customer resources

One or more customer resource is requested. The specific number of resources provided is Accelerator and customer specific.

Customer resource and responsibilities

Customer resource	Responsibilities	Required	Optional
Platform Owner	Responsible for the overall accountability of the ServiceNow platform. Provides leadership and oversight to the System Administrators, ensures team alignment to business strategy and the ServiceNow roadmap, and is actively involved in the overarching governance of the platform.	#	
System Administrators	Maintains the stability and usability of the ServiceNow platform by performing application maintenance, managing support for cases related to ServiceNow applications, and contributing to ServiceNow software releases by delivering configuration tasks and features.	#	
Process Owners	A senior leader within each business unit for each major process or service (e.g., customer service, incident) who is accountable for ensuring the process is fit for purpose.	#	
Other customer roles	Primary stakeholders responsible for Product and Portfolio management.		#
Developers	Writes code for the ServiceNow platform.		#
Trusted Service Partners	Attends ServiceNow Impact Accelerator coaching session(s) to understand leading practices and potentially support customer going forward.		#

Requested information / access

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Exclusions

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ServiceNow resources are not responsible for implementing recommendations on customer's non-production or production instances.

Jumpstart Your Event Management

The Jumpstart Your Event Management Accelerator provides a demonstration of the possibilities and capabilities of Event Management.

Accelerator overview

Jumpstart Your Event Management provides Impact customers with a comprehensive overview of Event Management. Through an applied demonstration, we highlight how you can leverage the power of the ServiceNow Configuration Management Database (CMDB) to receive and review near real-time alerts from your infrastructure directly within the ServiceNow platform. This offering equips our customers with essential ServiceNow resources and leading practice guides on#how to get started with Event Management. See Event Management for additional information about the feature.

Note: This Accelerator is available for Impact Guided, Advanced, and Total packages.

Offered pursuant to the applicable ServiceNow Impact Package and Accelerator descriptions available at https://www.servicenow.com/legal/servicenow-impact.html.

What You Get

Session Preparation

- Provision a temporary instance
- Install Event Management
- Install Event Generator application

Customer Coaching Session #1 (Up to 90 minutes)

Includes the following:

- Overview of:
  - Event Management
  - Service Operations Workspace Alert Console
  - Event Management connectors
  - Event rules
- An applied demonstration of:
  - Generating events via the Event Generator app
  - Alerts to configuration item (CI) Binding
  - Existing alerts or services impacted
- Leading practice guides and resources
- 30 days of access to the temporary instance is provided

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Customer Coaching Session #2 (Optional upon Customer request - up to 60 minutes)

Opportunity for Q&A related to Event Management

Requested Customer Resources

Customer Resource	Responsibilities
Platform Owner (Required)	Responsible for the overall accountability of the ServiceNow platform. Provides leadership and oversight to the System Administrators, ensures team alignment to business strategy and the ServiceNow roadmap, and is actively involved in the overarching governance of the platform.
System Administrator(s) (Required)	Maintains the stability and usability of the ServiceNow platform by performing application maintenance, managing support for cases related to ServiceNow applications, and contributing to ServiceNow software releases by delivering configuration tasks and features.
Event/Service Operator (Required)	Subject matter expert responsible for operating the alert console.
Service Manager(s) (Recommended)	Subject matter expert responsible for managing the applicable service.
Trusted Service Partners (Recommended)	Attends ServiceNow Impact Accelerator coaching session(s) to understand leading practices and potentially support customer going forward.
Application Service Owner(s) (Required)	Manages all applications across a given division (e.g., HR application owner).

Requested information / access

Refer to the applicable Impact Accelerator description available at https://www.servicenow.com/legal/servicenow-impact.html

Exclusions

This Impact Accelerator in its entirety or portions of the Impact Accelerator Activities may not be available to customers in certain restricted environments, to self-hosted customers, or to managed service providers (except for their internal#use).

ServiceNow resources are not responsible for implementing recommendations on a customer's non-production or production instances.

Jumpstart Your External Content Connectors

This accelerator provides a demonstration of the possibilities and capabilities of External Content Connectors (XCC).

Accelerator Overview

Jumpstart Your External Content Connectors (XCC) provides Impact customers with an overview and applied demonstration of External Content Connectors included as part of Workflow Data Fabric. It helps customers understand leveraging this new capability to configure their ServiceNow AI Search and search external systems such as SharePoint, Confluence, and

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more. Additionally, this accelerator includes key resources and leading practice guides to help customers get started in their own instance stack.

Note: This Accelerator is available for Impact Guided, Guided+ (SV or PG), Advanced, and Total packages.

What you get

Session Preparation

- Provision a temporary instance
- Activate and configure related plug-ins
- Configure an External Content Connector

Customer Coaching Session #1 (up to 90 min)

- Includes the following:
  - Overview of External Content Connectors
  - End-user experience
  - Technical demonstration highlighting the configuration process
  - XCC Roadmap to guide next steps
- Temporary instance with 30 days provided access.

Customer Coaching Session #2 (Optional upon Customer request – up to 60 min)

Opportunity for Q&A related to AI Search or External Content Connectors.

Requested customer resources

Customer Resource	Responsibilities	Required	Recommended
Platform Owner- Required	Responsible for the overall accountability of the ServiceNow platform. Provides leadership and oversight to the System Administrators, ensures team alignment to business strategy and the ServiceNow roadmap, and is actively involved in the overarching governance of the platform.	#	
System Administrator(s)- Required	Maintains the stability and usability of the ServiceNow platform by performing application maintenance, managing support for cases related to ServiceNow applications, and contributing to ServiceNow software releases by delivering configuration tasks and features.	#	
Developer(s)- Recommended	Writes code for the ServiceNow platform.		#
Trusted Service Partners- Recommended	Attends ServiceNow Impact Accelerator coaching session(s) to understand		#

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Customer Resource	Responsibilities	Required	Recommended
	leading practices and potentially support customer going forward.		

Requested information/access

Please refer to the applicable Impact Accelerator Description available at https://www.servicenow.com/upgrade-schedules.html

Exclusions

This Impact Accelerator in its entirety or portions of the Impact Accelerator activities may not be available to customers in certain restricted environments or to self-hosted customers.

ServiceNow is not responsible for implementing recommendations on Customer's non-production or production instances.

Jumpstart Your GenAI

This Accelerator provides a demonstration of the possibilities and capabilities of ServiceNow® GenAI (Artificial Intelligence).

Accelerator Overview

This accelerator provides Impact customers with an overview of how ServiceNow integrates GenAI on the Platform, highlighting its potential to improve efficiency and user experience. The session includes an applied demonstration of AI Agent experiences via a temporary instance and an overview of its onboarding process. Additionally, this offering shares leading practices for leveraging tools to gain personalized insights.

Note: This Accelerator is available for Impact Guided, Guided+ (SV or PG), Advanced, and Total packages.

Session Preparation

- Provision a temporary instance
- Activate and install the necessary plugins
- Run Automation Discovery and Custom Scanning Tool

What You Get

Customer Coaching Session #1 (up to 90 minutes)

Includes the following:

- Overview of GenAI and Now Large Language Models (LLM)
- End-user experience demonstration
- Technical demonstration
- Key resources and guides
- 30 days of access to the temporary instance are provided

Customer Coaching Session #2 (Optional upon Customer request, up to 60 minutes)

Opportunity for Q&A related to GenAI

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Requested Customer Resources

Customer resource and responsibilities

Customer Resource	Responsibilities
Platform Owner (Required)	Responsible for the overall accountability of the ServiceNow platform. Provides leadership and oversight to the System Administrators, ensures team alignment to business strategy and the ServiceNow roadmap, and is actively involved in the overarching governance of the platform.
System Administrator(s) (Required)	Maintains the stability and usability of the ServiceNow platform by performing application maintenance, managing support for cases related to ServiceNow applications, and contributing to ServiceNow software releases by delivering configuration tasks and features.
Developer(s) (Recommended)	Writes code for the ServiceNow platform.
Process Owner (Recommended)	Owner of a business process that can be accelerated using AI Agents.
Trusted Service Partners (Recommended)	Attends ServiceNow Impact Accelerator coaching sessions to understand leading practices and potentially support customer going forward.

Requested Information/Access

Refer to the applicable Impact Accelerator description available at https://www.servicenow.com/upgrade-schedules.html.

Exclusions

This Impact Accelerator in its entirety or portions of the Impact Accelerator activities may not be available to customers in certain restricted environments, to self-hosted customers, or to managed service providers with domain separated instances.

ServiceNow is not responsible for implementing recommendations on Customer's non-production or production instances.

Jumpstart Your Issue Auto Resolution

The Jumpstart Your Issue Auto Resolution (IAR) Accelerator provides a demonstration of the possibilities and capabilities of Issue Auto Resolution within your ServiceNow platform.

Overview

Jumpstart Your Issue Auto Resolution provides Impact customers with an introduction to IAR#to deflect high-volume, non-critical tasks and#demonstrates how IAR will#enhance self-service and automation capabilities. This Accelerator aims to educate customers on the possibilities and

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capabilities of IAR, specific use cases, a configuration overview, and key resources and guides to enable customers on getting started.

See Issue auto-resolution tab for additional information on IAR.

Note: This Accelerator is available for Impact Guided, Advanced, and Total packages.

Offered pursuant to the applicable Impact Accelerator Description available at https://www.servicenow.com/legal/servicenow-impact.html

What You Get

Session preparation

- Provision a temporary instance
- Activate and configure IAR

Customer Coaching Session #1 (Up to 90 minutes)

Includes the following:

- Overview of IAR benefits and impact
- Comprehensive demonstration on how to:
  - Lower incident and case volume
  - Improve self-service
  - Reduce Mean-Time-To-Resolution (MTTR)
  - Increase Virtual Agent adoption
- Configuration overview
- Demonstration of how to monitor performance using the Analytics Dashboard
- Maintenance leading practices discussion
- Key resources and guides
- 30 days of access to the temporary instance is provided

Customer Coaching Session #2 (Optional upon Customer request, up to 60 minutes)

Opportunity for Q&A related to IAR

Requested Customer Resources

Customer Resource	Responsibilities
Platform Owner (Required)	Responsible for the overall accountability of the ServiceNow platform. Provides leadership and oversight to the System Administrators, ensures team alignment to business strategy and the ServiceNow roadmap, and is actively involved in the overarching governance of the platform.
System Administrator (Required)	Maintains the stability and usability of the ServiceNow platform by performing application maintenance, managing support for cases related to ServiceNow applications,

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Customer Resource	Responsibilities
	and contributing to ServiceNow software releases by delivering configuration tasks and features.
Virtual Agent Owner (Recommended)	Subject matter expert responsible for ServiceNow Virtual Agent.
Service Desk Manager(s) (Recommended)	Subject matter expert responsible for managing Service Desk.
Trusted Service Partners (Recommended)	Attends ServiceNow Impact Accelerator coaching session(s) to understand leading practices and potentially support customer going forward.

Requested Information

Please refer to the applicable Impact Accelerator Description available athttps://www.servicenow.com/legal/servicenow-impact.html

Exclusions

This Impact Accelerator in its entirety or portions of the Impact Accelerator activities may not be available to customers in certain restricted environments, to self-hosted customers, or to managed service providers with domain separated instances.

ServiceNow is not responsible for implementing recommendations on Customer's sub-production or production instances.

Jumpstart Your ITOM Discovery

This accelerator provides foundational guidance for a successful IT Operations Management (ITOM) Discovery implementation, along with a demonstration of its possibilities and capabilities.

Accelerator Overview

Jumpstart Your ITOM Discovery educates customers on the technical foundations of horizontal discovery within the ITOM Discovery product and proactively addresses key topics such as security considerations, product core configuration, automated CMDB data entry, and more. Through an overview and applied demonstration, customers will gain the knowledge and confidence needed to begin their ITOM Visibility journey effectively. Additionally, this accelerator includes key resources and leading practice guides to help customers throughout their journey.

If you wish to know more about Top-Down Discovery (Service Mapping), please request the Jumpstart Your Service Mapping accelerator.

Note: This Accelerator is available for Impact Guided, Guided+ (Strategic Value or Platform Governance), Advanced, and Total Packages. This offering currently makes use of a ServiceNow demonstration instance.

What You Get

Session Preparation

Prepare ServiceNow demonstration instance

Customer Coaching Session #1 (up to 90 min)

Includes the following:

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- Overview of:
  - horizontal discovery
  - Discovery types and how they work
  - core configuration and setup steps
  - MID Server(s)
  - teams and their roles
- Demonstration of:
  - horizontal discovery
  - Discovery Admin Workspace
- Leading practices to support a successful implementation

Customer Coaching Session #2 (Optional upon Customer request-up to 60 min)

Opportunity for Q&A related to ITOM Discovery

Requested Customer Resources

Customer resource and responsibilities

Customer Resource	Responsibilities	Required	Recommended
Platform Owner	Responsible for the overall accountability of the ServiceNow platform. Provides leadership and oversight to the System Administrators, ensures team alignment to business strategy and the ServiceNow roadmap, and actively involves in the overarching governance of the platform.	#	
System Administrator(s)	Responsible for maintaining the stability and usability of the ServiceNow platform by performing application maintenance, managing support for Cases related to ServiceNow applications, and contributing to ServiceNow software releases by delivering configuration tasks and features.	#	
Discovery Administrator(s)	Primary stakeholder for Discovery.	#	
CMDB Administrator(s)	Maintains the stability and usability of the ServiceNow platform by performing application maintenance specifically within the CMDB.		#
Trusted Service Partners	Attends ServiceNow Impact Accelerator coaching session(s) to understand leading practices and potentially support customer going forward.		#

Jumpstart Your Knowledge Management

The Jumpstart Your Knowledge Management Accelerator provides a demonstration of the possibilities and capabilities of Knowledge Management.

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Accelerator overview

Jumpstart Your Knowledge Management provides Impact customers with an#overview of Knowledge Management's key capabilities and features. This offering explores core functionalities and leading practices, guiding customers through effective implementation and adoption strategies. You will learn how to streamline knowledge creation and sharing while enhancing search outcomes for your organization. Additionally, we demonstrate how well crafted knowledge content amplifies results when used with AI-powered features. This Accelerator also includes key resources and leading practice guides to set you on the path to knowledge excellence.

Note: This Accelerator is available for Impact Guided, Advanced, and Total packages.

Offered pursuant to the applicable Impact Accelerator Description available at#https://www.servicenow.com/legal/servicenow-impact.html

What you get

Session preparation

- Provision a temporary instance
- Activate related plugins

Customer coaching session #1 (up to 90 minutes)

Includes the following:

- Overview of Knowledge Management capabilities & features
- Applied demonstration on setting up Knowledge Management for success
  - Effective planning & governance
  - Initial setup and configuration support
  - Strategies for managing and consuming Knowledge effectively
- Key resources and leading practices guides
- 30 days access to the temporary instance is provided

Customer coaching session #2 (optional upon customer request, up to 60 minutes)

Opportunity for Q&A related to Knowledge Management.

Requested customer resources

One or more customer resource is requested. The specific number of resources provided is Accelerator and customer specific.

Customer resource and responsibilities

Customer resource	Responsibilities	Required	Optional
Platform Owner	Responsible for the overall accountability of the ServiceNow platform. Provides leadership and oversight to the System Administrators, ensures team alignment to business strategy and the ServiceNow roadmap, and is actively involved in the	#	

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Customer resource and responsibilities (continued)

Customer resource	Responsibilities	Required	Optional
	overarching governance of the platform.		
System Administrators	Maintains the stability and usability of the ServiceNow platform by performing application maintenance, managing support for cases related to ServiceNow applications, and contributing to ServiceNow software releases by delivering configuration tasks and features.	#	
Knowledge Process Owners	Primary stakeholders responsible for Knowledge Management process.	#	
Knowledge Content Stakeholders	Owns, administers, consumes or distributes organizational knowledge. This may include other process and information owners as well as agents, employees and representatives for external stakeholders. Examples: Service Desk Manager for ITSM, Customer Service Manager for CSM, Information Architects, User Experience Analysts,Agents, Engineers & Fulfillers, and Representatives for Employees, Customers, Partners & Consumers.		#
Developers	Writes code for the ServiceNow platform.		#
Trusted Service Partners	Attends ServiceNow Impact Accelerator coaching session(s) to understand leading practices and potentially support customer going forward.		#

Requested information / access

Refer to the applicable Impact Accelerator description available at https://www.servicenow.com/legal/servicenow-impact.html

Exclusions

This Impact Accelerator in its entirety or portions of the Impact Accelerator activities may not be available to customers in certain restricted environments, to self-hosted customers, or to managed service providers with domain separated instances.

ServiceNow resources are not responsible for implementing recommendations on customer's non-production or production instances.

Jumpstart Your Legacy Workflow Migration

The Jumpstart Your Legacy Workflow Migration Accelerator provides a demonstration of the possibilities and capabilities of Legacy Workflow Migration.

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Accelerator overview

Jumpstart Your Legacy Workflow Migration provides Impact customers with an overview and applied demonstration of migrating from legacy workflows to Flows and Playbooks. This offering #supports customers in adopting modern low-code automation tools, replacing workflows scheduled to be phased out in future releases. Additionally, this Accelerator provides key resources and leading practice guides to help customers with a smooth#ransition.

Note: This Accelerator is available for Impact Guided, Advanced, and Total packages.

Offered pursuant to the applicable Impact Accelerator Description available at#https://www.servicenow.com/legal/servicenow-impact.html

What you get

Session preparation

- Provision a temporary instance
- Activate and configure flows and playbooks

Customer coaching session #1 (up to 90 minutes)

Includes the following:

- Overview of Workflow Studio
  - Playbook
  - Decision tables
- Applied demonstration of: low code automatic tools
  - Flows
  - Subflows
  - Actions
- Key resources and guides on leading practices
- 30 days access to the temporary instance is provided

Customer coaching session #2 (optional upon customer request, up to 60 minutes)

Opportunity for Q&A related Legacy Workflow Migration

Requested customer resources

One or more customer resource is requested. The specific number of resources provided is Accelerator and customer specific.

Customer resource and responsibilities

Customer resource	Responsibilities	Required	Optional
Platform Owner	Responsible for the overall accountability of the ServiceNow platform. Provides leadership and oversight to the System Administrators, ensures team alignment to business strategy and the ServiceNow roadmap, and is actively involved in the	#	

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Customer resource and responsibilities (continued)

Customer resource	Responsibilities	Required	Optional
	overarching governance of the platform.		
System Administrators	Maintains the stability and usability of the ServiceNow platform by performing application maintenance, managing support for cases related to ServiceNow applications, and contributing to ServiceNow software releases by delivering configuration tasks and features.	#	
Stakeholders	Primary stakeholders responsible for Product and Portfolio management.	#	
Developers	Writes code for the ServiceNow platform.		#
Trusted Service Partners	Attends ServiceNow Impact Accelerator coaching session(s) to understand leading practices and potentially support customer going forward.		#
Business Process Owner	Responsible for developing, analyzing and improving critical business processes.		#

Requested information / access

Refer to the applicable Impact Accelerator description available at https://www.servicenow.com/legal/servicenow-impact.html

Exclusions

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Jumpstart Your Migration of Platform Analytics

The Jumpstart Your Migration of Platform Analytics Accelerator provides a demonstration of how to successfully prepare and migrate your Platform Analytics content.

Overview

Jumpstart Your Migration of Platform Analytics provides Impact customers with an overview of the changes required to migrate your Platform Analytics content. The Accelerator includes walking through the migration process with a clone of the customer's instance and highlighting some typical questions, issues, and next steps. Advice and direction are provided to prepare for the change.

See Platform Analytics for additional information on Platform Analytics applications.

Note: This Accelerator is available for Impact Guided, Advanced, and Total packages.

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What You Get

Session preparation

- Provisioning of a temporary instance
- Review of customer's Platform Analytics implementation and migration readiness
- Run Platform Analytics HealthScan (if applicable)

Customer Coaching Session #1 (Up to 90 minutes)

Includes the following:

- Overview of readiness activities (organization and platform) and migration steps
- Review updates for:
  - Core ServiceNow content
  - Migration process based on the customer's install base
- Customer migration process walkthrough
- Discuss recommendations based on the initial review
- 30 days of access to the temporary instance is provided

Customer Coaching Session #2 (Optional upon Customer request, up to 60 minutes)

Opportunity for Q&A related to the Platform Analytics migration process

Requested Customer Resources

Customer resource and responsibilities

Customer Resource	Responsibilities
Platform Owner- Required	Responsible for the overall accountability of the ServiceNow platform. Provides leadership and oversight to the System Administrators, ensures team alignment to business strategy and the ServiceNow roadmap, and is actively involved in the overarching governance of the platform.
System Administrator(s)- Required	Maintains the stability and usability of the ServiceNow platform by performing application maintenance, managing support for cases related to ServiceNow applications, and contributing to ServiceNow software releases by delivering configuration tasks and features.
Reporting Lead(s)- Required	Meets with the ServiceNow Impact Accelerator Consultant, provides access to the required resources, and drives the actions from the engagement.
Developer(s)- Recommended	Writes code for the ServiceNow platform.

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Customer resource and responsibilities (continued)

Customer Resource	Responsibilities
Process/Service Owner(s)- Recommended	A senior leader within each business unit for each major process or service (e.g., incident, change, employee onboarding) who is accountable for ensuring the process is fit for purpose#
Process Lead(s)- Recommended	Subject matter expert responsible for managing the applicable process.
Service Manager(s)- Recommended	Subject matter expert responsible for managing the applicable service.
Trusted Service Partners- Recommended	Attends ServiceNow Impact Accelerator coaching session(s) to understand leading practices and potentially support customer going forward.

Requested Information

Please refer to the applicable Impact Accelerator Description available athttps://www.servicenow.com/legal/servicenow-impact.html

Exclusions

This Impact Accelerator in its entirety or portions of the Impact Accelerator Activities may not be available to customers in certain restricted environments, to self-hosted customers, or in other restricted environments, or to managed service providers (except for their internal#use).

ServiceNow resources are not responsible for implementing recommendations on customer sub-production or production instances.

Jumpstart Your Multi-lingual Virtual Agent

This Accelerator provides a demonstration of the possibilities and capabilities of Dynamic Translation.

Overview

Jumpstart Your Multi-lingual Virtual Agent Accelerator provides Impact customers with a demonstration of the possibilities and capabilities of Dynamic Translation. A demonstration of how Dynamic Translation works using Virtual Agent conversations, within AI Search via a temporary cloned instance, and hand-offs to Live Agent are included. Leading practices to get started are also incorporated.

See Virtual Agent for additional information on Virtual Agent.

Note: This Accelerator is available in Guided, Advanced, and Total Packages.

Offered pursuant to the applicable Impact Accelerator Description available at https://www.servicenow.com/legal/servicenow-impact.html

What you get

AI Search Assessment

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- Provisioning of a temporary instance
- Activating and configuring Dynamic Translation

Customer Coaching Session #1 (up to 60 min)

- Thirty days of access to the temporary instance
- Overview of Dynamic Translation and how to set it up
- Demonstration of Virtual Agent chatbot using dynamic translation
- Demonstration of Live Agent conversation using different languages
- Demonstration of Internationalization support for AI Search
- NLU multi-lingual support
- Leading practices and resources

Customer Coaching Session #2 (Optional on Customer request – up to 60 min)

Opportunity for a Questions and Answers session related to Dynamic Translation

Requested customer resources

Customer resource and responsibilities

Customer Resource	Responsibilities
Platform Owner (Required)	Responsible for the overall accountability of the ServiceNow platform. Provides leadership and oversight to the System Administrators, ensures team alignment to business strategy and the ServiceNow roadmap, and is actively involved in the overarching governance of the platform.
Virtual Agent Lead (Required)	Subject matter expert responsible for ServiceNow Virtual Agent.
System Administrator(s) (Required)	Maintains the stability and usability of the ServiceNow platform by performing application maintenance, managing support for cases related to ServiceNow applications, and contributing to ServiceNow software releases by delivering configuration tasks and features.
Linguist or Localization Expert (Recommended)	Subject matter expert responsible for managing ServiceNow localization.
Developer(s) (Recommended)	Writes code for the ServiceNow platform.
Trusted Service Partners (Recommended)	Attends ServiceNow Impact Accelerator coaching session(s) to understand leading practices and potentially support customer going forward.

Requested information/access

Please refer to the applicable Impact Accelerator Description available at https://www.servicenow.com/legal/servicenow-impact.html

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Exceptions

This Impact Accelerator in its entirety or portions of the Impact Accelerator Activities may not be available to customers in the FedRAMP, NSC DOD IL5, or Australia IRAP-Protected data centers, to self-hosted customers, or in other restricted environments.

ServiceNow is not responsible for implementing [Product] recommendations on Customer's sub-production or production instances.

Jumpstart Your Natural Language Understanding

The Jumpstart Your Natural Language Understanding (NLU) Accelerator provides a demonstration of the possibilities and capabilities of Natural Language Understanding.

Overview

Jumpstart Your Natural Language Understanding provides Impact customers with a comprehensive overview of Natural Language Understanding, including many of the underlying features, such as, Planning, Building, Sizing, Training, Vocabulary, Testing, Entity, Deployment, and Monitoring. This offering aims to educate and help you increase your Virtual Agent adoption by laying the groundwork for a healthy foundation.

For related information, see Virtual Agent or Natural Language Understanding.

Note: This Accelerator is available for Impact Guided, Advanced, and Total packages.

Offered pursuant to the applicable ServiceNow Impact Package and Accelerator descriptions available at https://www.servicenow.com/legal/servicenow-impact.html.

What You Get

Session Preparation

- Provision a temporary instance
- Activate and run Intent Discovery
- Assess current NLU models, if applicable

Customer Coaching Session #1 (Up to 90 minutes)

Includes the following:

- NLU leading practices and resources review
- NLU component review:
  - Intent
  - Entity
  - Vocabulary
- Individual deep-dive into each NLU component
- Demonstration of testing and tuning
- Temporary instance with 30 days of provided access

Customer Coaching Session #2 (Optional upon Customer request - up to 60 minutes)

Opportunity for Q&A related to Natural Language Understanding

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Requested Customer Resources

Customer resource and responsibilities

Customer Resource	Responsibilities
Platform Owner (Required)	Responsible for the overall accountability of the ServiceNow platform. Provides leadership and oversight to the System Administrators, ensures team alignment to business strategy and the ServiceNow roadmap, and is actively involved in the overarching governance of the platform.
System Administrator(s) (Required)	Maintains the stability and usability of the ServiceNow platform by performing application maintenance, managing support for cases related to ServiceNow applications, and contributing to ServiceNow software releases by delivering configuration tasks and features.
Virtual Agent Lead (Required)	Subject matter expert responsible for ServiceNow ITSM Virtual Agent.
Developer(s) (Required)	Writes code for the ServiceNow platform.
Trusted Service Partners (Recommended)	Attends ServiceNow Impact Accelerator coaching session(s) to understand leading practices and potentially support customer going forward.

Requested Information/Access

Please refer to the applicable Impact Accelerator Description available athttps://www.servicenow.com/legal/servicenow-impact.html

Exceptions

This Impact Accelerator in its entirety or portions of the Impact Accelerator Activities may not be available to customers in the FedRAMP, NSC DOD IL5, or Australia IRAP-Protected data centers, to self-hosted customers, or in other restricted environments, or to managed service providers (except for their internal#use).

ServiceNow is not responsible for implementing Natural Language Understanding recommendations on Customer's sub-production or production instances.

Jumpstart Your Now Assist for Creator

The Jumpstart Your Now Assist for Creator Accelerator provides a demonstration of the possibilities and capabilities of Now Assist for Creator.

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Accelerator overview

Jumpstart Your Now Assist for Creator provides Impact customers with an overview of Now Assist for Creator and an applied demonstration on how#to use Generative AI capabilities to reduce app development time, increase productivity, and improve overall coding experiences. This accelerator will demonstrate the features of Now Assist for Creator and provide key resources and leading practices for getting started.

For additional information on the feature, see Now Assist for Creator

Note: This Accelerator is available for Impact Guided, Advanced, and Total packages.

Offered pursuant to the applicable Impact Accelerator Description available at#https://www.servicenow.com/legal/servicenow-impact.html

What you get

Session preparation

- Provision a temporary instance
- Activate related plugins

Customer coaching session #1 (up to 90 minutes)

Includes the following:

- Overview of Now Assist for Creator
- Applied demonstration of Now Assist for Creator
  - Text to Application Creator
  - Playbook Assist
  - Flow Recommendation
  - Now Assist in Catalog Builder
  - Now Assist for Code generation
- Guidance on how to use AI Prompts successfully
- Key resources and guides on leading practices
- 30 days access to the temporary instance is provided

Customer coaching session #2 (optional upon customer request, up to 60 minutes)

Opportunity for Q&A related to Now Assist for Creator

Requested customer resources

One or more customer resource is requested. The specific number of resources provided is Accelerator and customer specific.

Customer resource and responsibilities

Customer resource	Responsibilities	Required	Optional
Platform Owner	Responsible for the overall accountability of the ServiceNow platform. Provides leadership and oversight to the System Administrators,	#	

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Customer resource and responsibilities (continued)

Customer resource	Responsibilities	Required	Optional
	ensures team alignment to business strategy and the ServiceNow roadmap, and is actively involved in the overarching governance of the platform.		
System Administrators	Maintains the stability and usability of the ServiceNow platform by performing application maintenance, managing support for cases related to ServiceNow applications, and contributing to ServiceNow software releases by delivering configuration tasks and features.	#	
Trusted Service Partners	Attends ServiceNow Impact Accelerator coaching session(s) to understand leading practices and potentially support customer going forward.		#

Requested information / access

Refer to the applicable Impact Accelerator description available at https://www.servicenow.com/legal/servicenow-impact.html

Exclusions

This Impact Accelerator in its entirety or portions of the Impact Accelerator activities may not be available to customers in certain restricted environments, to self-hosted customers, or to managed service providers with domain separated instances.

ServiceNow resources are not responsible for implementing recommendations on customer's sub-production or production instances.

Jumpstart Your Now Assist in Document Intelligence

This accelerator provides a demonstration of the possibilities and capabilities of Now Assist in Document Intelligence.

Accelerator Overview

Jumpstart Your Now Assist in Document Intelligence (DocIntel) provides Impact customers with an overview and applied demonstration of Now Assist in DocIntel functionality. This offering helps customers understand a capability that is central to both AI Agents and Now Assist Skills. It also serves as a valuable resource for developers building custom workflows that involve documents. Additionally, this accelerator includes key resources and leading practice guides to help customers get started.

Note: This Accelerator is available for Impact Guided, Guided+ (SV or PG), Advanced, and Total packages.

What you get

Session Preparation

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- Provision a temporary instance
- Activate and configure related plug-ins
- Create demonstration use cases

Customer Coaching Session #1 (up to 90 min)

Includes the following:

- Overview of the benefits and impact of Now Assist in DocIntel
- End-user experience walk-through
- Technical demonstration
  - Configuration overview
  - Setup
- Monitoring results with the Analytics Dashboard
- Temporary instance with 30 days provided access

Customer Coaching Session #2 (Optional upon Customer request – up to 60 min)

Opportunity for Q&A related to Now Assist in DocIntel.

Requested customer resources

Customer Resource	Responsibilities	Required	Recommended
Platform Owner- Required	Responsible for the overall accountability of the ServiceNow platform. Provides leadership and oversight to the System Administrators, ensures team alignment to business strategy and the ServiceNow roadmap, and is actively involved in the overarching governance of the platform.	#	
System Administrator(s)- Required	Maintains the stability and usability of the ServiceNow platform by performing application maintenance, managing support for cases related to ServiceNow applications, and contributing to ServiceNow software releases by delivering configuration tasks and features.	#	
Process Owner(s)- Required	A senior leader within each business unit for each major process or service (for example: incident, change, employee onboarding) who	#	

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Customer Resource	Responsibilities	Required	Recommended
	is accountable for ensuring the process is fit for purpose.		
Developer(s) - Recommended	Writes code for the ServiceNow platform.		#
Trusted Service Partners- Recommended	Attends ServiceNow Impact Accelerator coaching session(s) to understand leading practices and potentially support customer going forward.		#

Requested information/access

Please refer to the applicable Impact Accelerator Description available at https://www.servicenow.com/upgrade-schedules.html

Exclusions

This Impact Accelerator in its entirety or portions of the Impact Accelerator activities may not be available to customers in certain restricted environments or to self-hosted customers.

ServiceNow is not responsible for implementing recommendations on Customer's non-production or production instances.

Jumpstart Your Now Assist in Virtual Agent

The Jumpstart Your Now Assist in Virtual Agent (VA) Accelerator provides a demonstration of the possibilities and capabilities of Now Assist in Virtual Agent.

Accelerator overview

Jumpstart Your Now Assist in Virtual Agent provides Impact customers with an overview and applied#demonstration that helps you to gain a deeper understanding of how to get started with Now Assist in VA. This Accelerator guides customers through the setup process, while highlighting#he potential of Generative AI in the Virtual Agent space. Additionally, it offers key resources and leading practices for getting started with confidence.

For additional information on the feature, see Now Assist in Virtual Agent

Note: This Accelerator is available for Impact Guided, Advanced, and Total packages.

Offered pursuant to the applicable Impact Accelerator Description available at#https://www.servicenow.com/legal/servicenow-impact.html

What you get

Session preparation

- Provision a temporary instance
- Activate related plugins
- Configure Now Assist in VA
- Build use cases to demonstrate during coaching session

Customer coaching session #1 (up to 90 minutes)

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Includes the following:

- Overview of Now Assist in VA base system features
- Review of prompt guidance
- Applied demonstration of:
  - Now Assist search in VA
  - Turn by turn catalog ordering
  - New VA Designer home page
  - Topic migration (for pre-existing VA)
  - Live Agent transfer with Chat Summarization
  - Reporting
- Key resources and guides on leading practices
- 30 days access to the temporary instance is provided

Customer coaching session #2 (optional upon customer request, up to 60 minutes)

Opportunity for Q&A related to Now Assist in VA

Requested customer resources

One or more customer resource is requested. The specific number of resources provided is Accelerator and customer specific.

Customer resource and responsibilities

Customer resource	Responsibilities	Required	Optional
Platform Owner	Responsible for the overall accountability of the ServiceNow platform. Provides leadership and oversight to the System Administrators, ensures team alignment to business strategy and the ServiceNow roadmap, and is actively involved in the overarching governance of the platform.	#	
System Administrators	Maintains the stability and usability of the ServiceNow platform by performing application maintenance, managing support for cases related to ServiceNow applications, and contributing to ServiceNow software releases by delivering configuration tasks and features.	#	
Trusted Service Partners	Attends ServiceNow Impact Accelerator coaching session(s) to understand leading practices and potentially support customer going forward.		#

Requested information / access

Refer to the applicable Impact Accelerator description available at https://www.servicenow.com/legal/servicenow-impact.html

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Exclusions

This Impact Accelerator in its entirety or portions of the Impact Accelerator activities may not be available to customers in certain restricted environments, to self-hosted customers, or to managed service providers with domain separated instances.

ServiceNow resources are not responsible for implementing recommendations on customer's non-production or production instances.

Jumpstart Your Now Assist Skill Kit

This Accelerator provides a demonstration of the possibilities and capabilities of Now Assist Skill Kit.

Accelerator overview

Jumpstart Your Now Assist Skill Kit provides Impact customers with an overview of the capabilities and features of Now Assist Skill Kit. Through an applied#demonstration, we highlight the#creation of a simple, custom use case, such as Sentiment Analysis, illustrating how Skill Kit enables customers to harness the full potential of Now LLM and the platform combined for their unique needs. Additionally, this Accelerator provides customers with key resources and leading practices guides for getting started.

Note: This Accelerator is available for Impact Guided, Guided+ (SV or PG), Advanced, and Total packages.

What you get

Session preparation

- Provision a temporary instance
- Activate Now Assist Skill Kit

Customer coaching session #1 (up to 90 minutes)

Includes the following:

- Overview of Now Assist Skill Kit and Data Kit capabilities and features
- Applied demonstration of Now Assist Skill Kit:
  - Configuration of Sentiment Analysis Skill
  - ▪ Prompt assistance
    - Skill configuration
    - Deployment
- Key resources and guides on leading practices
- 30 days of access to the temporary instance is provided

Customer coaching session #2 (optional on customer request, up to 60 minutes)

Opportunity for Q&A related to Now Assist Skill Kit

Requested customer resources

One or more customer resource is requested. The specific number of resources provided is Accelerator and customer specific.

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Customer resource and responsibilities

Customer resource	Responsibilities	Required	Optional
Platform Owner	Responsible for the overall accountability of the ServiceNow platform. Provides leadership and oversight to the System Administrators, ensures team alignment to business strategy and the ServiceNow roadmap, and is actively involved in the overarching governance of the platform.	#	
System Administrators	Maintains the stability and usability of the ServiceNow platform by performing application maintenance, managing support for cases related to ServiceNow applications, and contributing to ServiceNow software releases by delivering configuration tasks and features.	#	
Trusted Service Partners	Attends ServiceNow Impact Accelerator coaching session(s) to understand leading practices and potentially support customer going forward.		#

Requested information / access

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Exclusions

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ServiceNow is not responsible for implementing recommendations on Customer's non-production or production instances.

Jumpstart Your Now Mobile for Employees

This accelerator provides a demonstration of the possibilities and capabilities of Now Mobile for Employees.

Accelerator Overview

Jumpstart Your Now Mobile for Employees introduces Impact customers to Now Mobile, providing an overview of its base system capabilities along with a demonstration of the configuration steps needed to get started. The session focuses on key employee-facing features such as viewing tasks, requests, and knowledge articles. We will also highlight how Now Mobile aligns with Employee Center to create a seamless employee experience. Additionally, this accelerator includes key resources and leading practice guides to help customers get started with success.

Note: This Accelerator is available for Impact#Guided, Guided+ (Strategic Value or Platform Governance), Advanced, and Total packages

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Prerequisites

Certain Now Mobile functionalities require Employee Center or Employee Center Pro (and any associated plugins).

What You Get

Session Preparation

- Provisioning of a temporary instance (if applicable)
- Activation and configuration of related plugins

Customer Coaching Session #1#(up to 90 min)

Includes the following:

- Overview of base system functionalities available to employees through Now Mobile
- Applied demonstration of how to configure data synchronization between Portal and Now Mobile
- Key resources and leading practices guides
- Temporary instance provided with 30 days access

Customer Coaching Session #2 (Optional upon Customer request - up to 60 min)

Opportunity for Questions and Answers related to Now Mobile for Employees

Requested Customer Resources

Customer resource and responsibilities

Customer Resource	Responsibilities	Required	Recommende
Platform Owner	Responsible for the overall accountability of the ServiceNow platform. Provides leadership and oversight to the System Administrators, ensures team alignment to business strategy and the ServiceNow roadmap, and actively involves in the overarching governance of the platform.	#	
System Administrator(s)	Responsible for maintaining the stability and usability of the ServiceNow platform by performing application maintenance, managing support for Cases related to ServiceNow applications, and contributing to ServiceNow software releases by delivering configuration tasks and features.	#	
Process Owner(s)	A senior leader within each business unit for each major process or service (Example, incident, change, employee onboarding) and is accountable for ensuring that the process is fit-for-purpose.	#	
Developers	Writes code for the ServiceNow platform.		#
Trusted Service Partners	Attends ServiceNow Impact Accelerator coaching session(s) to understand leading		#

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Customer resource and responsibilities (continued)

Customer Resource	Responsibilities	Required	Recommende
	practices and potentially support customer going forward.		

Requested Information / Access

Requested Information/Access

Note: Additional details on supplemental legal terms, prerequisites, specifications, requirements, and exclusions can be found in the Impact Accelerator Terms Matrix.

Jumpstart Your Platform Analytics

The Jumpstart Your Platform Analytics Accelerator provides a demonstration of the possibilities and capabilities of Platform Analytics.

Overview

Jumpstart Your Platform Analytics provides Impact customers with an overview of Platform Analytics and the ability to greatly improve service delivery quality, efficiency, and cost. An applied demonstration of reporting and Performance Analytics configuration, capabilities, and analytics via a temporary instance as well as leading practices on getting started is included.

Note: This Accelerator is available for Impact Guided, Advanced, and Total packages.

Offered pursuant to the applicable ServiceNow Impact Package and Accelerator descriptions available at https://www.servicenow.com/legal/servicenow-impact.html.

What you get

Session Preparation

- Provisioning of a temporary instance
- Installation of Platform Analytics Content Packs – ITSM focus

Customer Coaching Session #1 (up to 90 min)

Includes the following:

- Platform Analytics overview and demonstration
- Review Platform Analytics architecture
- Leading and lagging indicator best practices
- Discuss differences between reporting and Performance Analytics
- Thirty days of access to the temporary instance

Customer Coaching Session #2 (Optional upon Customer request – up to 60 min)

Opportunity for Q&A related to Platform Analytics

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Requested customer resources

Customer resource and responsibilities

Customer Resource	Responsibilities
Platform Owner (Required)	Responsible for the overall accountability of the ServiceNow platform. Provides leadership and oversight to the System Administrators, ensures team alignment to business strategy and the ServiceNow roadmap, and is actively involved in the overarching governance of the platform.
System Administrator(s) (Required)	Maintains the stability and usability of the ServiceNow platform by performing application maintenance, managing support for cases related to ServiceNow applications, and contributing to ServiceNow software releases by delivering configuration tasks and features.
Reporting Lead(s) (Required)	Meets with the ServiceNow Impact Accelerator Consultant, provides access to the required resources, and drives the actions from the engagement.
Process/Service Owner(s) (Recommended)	A senior leader within each business unit for each major process or service (e.g., incident, change, employee onboarding) who is accountable for ensuring the process is fit for purpose.
Developer(s) (Recommended)	Writes code for the ServiceNow platform.
Trusted Service Partners (Recommended)	Attends ServiceNow Impact Accelerator coaching session(s) to understand leading practices and potentially support customer going forward.

Requested information / access

Refer to the applicable Impact Accelerator description available at https://www.servicenow.com/legal/servicenow-impact.html

Exceptions

This Impact Accelerator in its entirety or portions of the Impact Accelerator Activities may not be available to customers in the FedRAMP, NSC DOD IL5, or Australia IRAP-Protected data centers, to self-hosted customers, or in other restricted environments.

ServiceNow resources are not responsible for implementing Platform Analytics recommendations on Customer's sub-production or production instances.

Jumpstart Your Predictive Intelligence

The Jumpstart Your Predictive Intelligence (PI) Accelerator provides a demonstration of the possibilities and capabilities of Predictive Intelligence and the clustering framework.

Accelerator Overview

Jumpstart Your Predictive Intelligence provides Impact customers with an overview of Predictive Intelligence machine learning (ML) capabilities, benefits, and outcomes. An overview of the four PI frameworks with an applied demonstration of Clustering is offered. Additionally, specific use cases, a configuration overview, and key resources to enable customers to reach their automation goals are highlighted.

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For related information, see Predictive Intelligence or Configuring advanced settings for your ML solutions for more information on Clustering parameters.

Note: This Accelerator is available for Impact Guided, Advanced, and Total packages.

Offered pursuant to the applicable ServiceNow Impact Package and Accelerator descriptions available at https://www.servicenow.com/legal/servicenow-impact.html.

What You Get

Session Preparation

- Provision a temporary instance
- Activate and configure Predictive Intelligence capabilities

Customer Coaching Session #1 (Up to 90 minutes)

Includes the following:

- Predictive Intelligence capabilities, benefits, and outcomes
- Overview of PI frameworks:
  - Classification
  - Clustering
  - Similarity
  - Regression
- Demonstration of the Clustering framework with specific use cases
- Configuration demonstration
- Discussion on how to train, test, and monitor results
- Interpretation of results and identification of next steps

Customer Coaching Session #2 (Optional upon Customer request - up to 60 minutes)

Opportunity for Q&A related to Predictive Intelligence

Requested Customer Resources

Customer resource and responsibilities

Customer Resource	Responsibilities	Required	Recommended
Platform Owner	Responsible for the overall accountability of the ServiceNow platform. Provides leadership and oversight to the System Administrators, ensures team alignment to business strategy and the ServiceNow roadmap, and is actively involved in the overarching governance of the platform.	#	

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Customer resource and responsibilities (continued)

Customer Resource	Responsibilities	Required	Recommended
System Administrator(s)	Maintains the stability and usability of the ServiceNow platform by performing application maintenance, managing support for cases related to ServiceNow applications, and contributing to ServiceNow software releases by delivering configuration tasks and features.	#	
Developer(s)	Writes code for the ServiceNow platform.		#
Trusted Service Partners	Attends ServiceNow Impact Accelerator coaching session(s) to understand leading practices and potentially support customer going forward.		#

Requested Information

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ServiceNow is not responsible for implementing Predictive Intelligence recommendations on Customer's sub-production or production instances.

Jumpstart Your Process Mining

Jumpstart Your Process Mining Accelerator provides a demonstration of the possibilities and capabilities of Process Mining.

Overview

Jumpstart Your Process Mining provides Impact customers with a comprehensive overview of Process Mining to visualize and analyze their#business processes. Through an applied demonstration, we illustrate how organizations can#identify inefficiencies, bottlenecks, and areas for#potential automation, ensuring timely resolution and optimized performance. This offering equips our customers with essential ServiceNow #resources and leading practice guides on#how to get started with Process Mining. For more information on Process Mining, see Process Mining.

Note: This Accelerator is available for Impact Guided, Advanced, and Total packages.

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What You Get

Session Preparation

- Provision a temporary instance
- Install Process Mining plugins
- Create and run base system projects

Customer Coaching Session #1 (Up to 90 minutes)

Includes the following:

- An overview of Process Mining capabilities
- Demonstration of:
  - Process Mining Workspace
  - Process Mining Reporting
- Technical deep dive: Tuning projects
- Leading practice guides and resources
- 30 days of access to the temporary instance is provided.

Customer Coaching Session #2 (Optional upon Customer request - up to 60 minutes)

Opportunity for Q&A related to Process Mining

Requested Customer Resources

Customer Resource	Responsibilities
Platform Owner (Required)	Responsible for the overall accountability of the ServiceNow platform. Provides leadership and oversight to the System Administrators, ensures team alignment to business strategy and the ServiceNow roadmap, and is actively involved in the overarching governance of the platform.
System Administrator(s) (Required)	Maintains the stability and usability of the ServiceNow platform by performing application maintenance, managing support for cases related to ServiceNow applications, and contributing to ServiceNow software releases by delivering configuration tasks and features.
Reporting Lead(s) (Required)	Meets with the ServiceNow Impact Accelerator Consultant, provides access to the required resources, and drives the actions from the engagement.
Process/Service Owner(s) (Recommended)	Writes code for the ServiceNow platform.

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Customer Resource	Responsibilities
Process Lead(s) (Recommended)	Subject matter expert responsible for managing the applicable process.
Service Manager(s) (Recommended)	Subject matter expert responsible for managing the applicable service.
Trusted Service Partners (Recommended)	Attends ServiceNow Impact Accelerator coaching session(s) to understand leading practices and potentially support customer going forward.

Requested Information

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Exceptions

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ServiceNow is not responsible for implementing Process Mining recommendations on customer's sub-production or production instances.

Jumpstart Your Service Mapping

The Jumpstart Your Service Mapping Accelerator provides a demonstration of the possibilities and capabilities of Service Mapping.

Accelerator overview

Jumpstart Your Service Mapping provides Impact customers with an overview and applied demonstration of Service Mapping. This Accelerator focuses on Service Mapping Foundational techniques and various mapping methods. The possibilities and capabilities of Service Mapping are highlighted, providing key resources and leading practices for getting started.

For more information on the feature, see Service Mapping.

Note: This Accelerator is available for Impact Guided, Advanced, and Total packages.

What you get

Session preparation

- Prepare a demonstration instance
- Activate Service Mapping related plugins

Customer coaching session #1 (up to 90 minutes)

Includes the following:

- Overview of Service Mapping
- Review mapping methods:

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- ML-based
- Tag-based
- Top-down

- Demonstration of Service Mapping features and capabilities
- Key resources and guides on leading practices

Customer coaching session #2 (optional upon customer request, up to 60 minutes)

Opportunity for Q&A related to Service Mapping

Requested customer resources

One or more customer resource is requested. The specific number of resources provided is Accelerator and customer specific.

Customer resource and responsibilities

Customer resource	Responsibilities	Required	Optional
Platform Owner	Responsible for the overall accountability of the ServiceNow platform. Provides leadership and oversight to the System Administrators, ensures team alignment to business strategy and the ServiceNow roadmap, and is actively involved in the overarching governance of the platform.	#	
Service Mapping Administrators	Works with IT app owners to determine critical application services. Assists in the planning, building and testing of Service Mapping. Review SM error log daily to check for any corrections that are required.	#	
System Administrators	Maintains the stability and usability of the ServiceNow platform by performing application maintenance, managing support for cases related to ServiceNow applications, and contributing to ServiceNow software releases by delivering configuration tasks R and features.	#	
IT Application Service Owners	Provides information needed for successful mapping of an application service to both Service Mapping Admin and System Admins. Populates and maintains application service records.		#
Trusted Service Partners	Attends ServiceNow Impact Accelerator coaching session(s) to understand leading practices and potentially support customer going forward.		#

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Jumpstart Your ServiceNow AI Journey

This Accelerator provides guidance on how to achieve your organization's goals and objectives with ServiceNow's AI capabilities.

Accelerator Overview

Jumpstart Your ServiceNow AI Journey helps Impact customers navigate ServiceNow's expansive catalog of AI and automation capabilities with prescriptive guidance tailored to organizational objectives. This includes building a personalized roadmap to adopt the ServiceNow capabilities that are aligned with your strategic goals and recommending Impact AI Accelerators to accelerate and enhance adoption.

Note: This Accelerator is available for Impact#Guided, Guided+ (Strategic Value or Platform Governance), Advanced, and Total packages

What You Get

Session Preparation

- Provision a temporary instance
- Run AI Adoption Scan to assess current usage of AI and related products
- Activate and run Automation Discovery to identify opportunities.

Customer Coaching Session #1(upto 1.5 hours)

Discovery session to:

- Set Accelerator expectations
- Conduct rapid SWOT Analysis
- Discuss strategic goals and objectives

Customer Coaching Session #2 (Up to 1 hour)

Review of:

- Business objectives
- AI Adoption Brief
- Impact AI Accelerators Roadmap

Customer Coaching Session #3#(Optional upon Customer request - up to 1 hour)

- Opportunity for Questions and Answers related to ServiceNow AI Journey
- Begin the newly created Impact AI Accelerator roadmap

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Requested Customer Resources

Customer resource and responsibilities

Customer Resource	Responsibilities	Required	Recommended
Top Management	Provides insight into objectives, defines targets and success metrics, commits resources to execute roadmap activities, and demonstrates executive commitment to success.	#	
Platform Owner	Responsible for the overall accountability of the ServiceNow platform. Provides leadership and oversight to the System Administrators, ensures team alignment to business strategy and the ServiceNow roadmap, and is actively involved in the overarching governance of the platform.	#	
Subject Matter Experts(s)	Stakeholders that provide insights into pain points at a granular level, support objective setting and success metric definition, and identify qualified resources to execute activities.	#	
Trusted Service Partners	Attends ServiceNow Impact Accelerator coaching session(s) to understand leading practices and potentially support customer going forward.		#

Requested Information/Access

- Objectives & horizon – 3 outcomes you want in the next 3–6–12 months
- Scope boundaries – units/products/geographies In vs. Out
- Top 3–5 use cases – name, stage (idea/pilot/prod), owner
- Constraints – budget/timebox, key staffing/tools limits
- Obligations – top laws/standards/contracts that are important
- Risk appetite & red lines – what's acceptable/not
- Success & safety metrics – 2–3 draft thresholds (for example, accuracy ≥X, bias ≤Y, drift alert at Z)
- Current-state snapshot – yes/no on: inventory exists, policy exists, risk review exists, monitoring exists.

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Requested Information/Access

Note: Additional details on supplemental legal terms, prerequisites, specifications, requirements, and exclusions can be found in the Impact Accelerator Terms Matrix.

Jumpstart Your Strategic Portfolio Management - Collaborative Work Management

This accelerator provides a demonstration of the possibilities and capabilities of Collaborative Work Management (CWM) with Strategic Portfolio Management (SPM).

Accelerator Overview

Jumpstart Your SPM - Collaboration Work Management (CWM) provides Impact customers with a comprehensive overview of the possibilities and capabilities of CWM. Our goal is to demonstrate how customers can set up and utilize CWM to plan, manage, visualize, and collaborate on work with their teams. Additionally, this accelerator offers key resources and leading practice guides on getting started.

Note: This Accelerator is available for Impact#Guided, Guided+ (Strategic Value or Platform Governance), Advanced, and Total packages

What You Get

Session Preparation

- Provision a temporary instance
- Activate and configure components of Collaborative Work Management
- Configuration and demonstration

Customer Coaching Session #1 (up to 90 min)

- Overview of CWM within Strategic Portfolio Management
- Walkthrough of key CWM capabilities and features
- Review leading practices with CWM usage and implementation guide
- Applied demonstration of CWM within SPM
- Temporary instance provided with 30 days access

Customer Coaching Session #2 (Optional upon Customer request - up to 60 min)

Opportunity for Q&A related to CWM within SPM

Requested Customer Resources

Customer resource and responsibilities

Customer Resource	Responsibilities	Required	Recommended
Platform Owner	Responsible for the overall accountability of the ServiceNow platform. Provides leadership and oversight to the System Administrators, ensures team alignment to business strategy and the ServiceNow roadmap, and is	#	

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Customer resource and responsibilities (continued)

Customer Resource	Responsibilities	Required	Recommended
	actively involved in the overarching governance of the platform.		
System Administrator(s)	Responsible for maintaining the stability and usability of the ServiceNow platform by performing application maintenance, managing support for Cases related to ServiceNow applications, and contributing to ServiceNow software releases by delivering configuration tasks and features.	#	
Other customer roles	Primary stakeholders responsible for Project Management. Example: Project Manager/Resource Manager – Individuals who are responsible for making requests for resources and/or collaborate on the allocation and planning of resources.	#	
Developer(s)	Writes code for the ServiceNow platform.		#
Trusted Service Partner(s)	Attends ServiceNow Impact Accelerator coaching session(s) to understand leading practices and potentially support customer going forward.		#

Requested Information / Access

Additional details on supplemental legal terms, prerequisites, specifications, requirements, and exclusions can be found by selecting the Impact Accelerator Terms Matrix.

Jumpstart Your Strategic Portfolio Management - Project Workspace

This accelerator provides a demonstration of the possibilities and capabilities of Project Workspaces within Strategic Portfolio Management (SPM).

Accelerator Overview

Jumpstart Your SPM – Project Workspace provides Impact customers with a comprehensive overview of the possibilities and capabilities of the Project Workspace in SPM. Our goal is to demonstrate preparing and implementing Project Workspace, to ensure proper setup of foundation data that enables a consolidated view of Projects and associated information. In addition, this accelerator includes key resources and leading practice guides to help customers get started.

Note: This Accelerator is available for Impact Guided, Guided+ (SV or PG), Advanced, and Total packages.

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What you get

Session Preparation

- Provision a temporary instance
- Activate and configure the applicable components of Project Workspaces within SPM

Customer Coaching Session #1 (up to 90 min)

Includes the following:

- Overview & demonstration of Project Workspaces
- Review setting Project Workspaces within SPM up for success:
  - Installation & configuration
  - High-level discussion on Foundation data
- Walk-through of key capabilities
- Suggestions for reimplementation next steps
- Temporary instance with 30 days provided access

Customer Coaching Session #2 (Optional upon Customer request – up to 60 min)

Opportunity for Q&A related to the Project Workspaces within SPM.

Requested customer resources

Customer Resource	Responsibilities	Required	Recommended
Platform Owner	Responsible for the overall accountability of the ServiceNow platform. Provides leadership and oversight to the System Administrators, ensures team alignment to business strategy and the ServiceNow roadmap, and is actively involved in the overarching governance of the platform.	#	
System Administrator(s)	Maintains the stability and usability of the ServiceNow platform by performing application maintenance, managing support for cases related to ServiceNow applications, and contributing to ServiceNow software releases by delivering configuration tasks and features.	#	
Other Customer Role(s)	Primary stakeholders responsible for Project Management. Example: Project Manager/Resource Manager – Individuals who are responsible for making requests for resources and/	#	

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Customer Resource	Responsibilities	Required	Recommended
	or collaborate on the allocation and planning of resources.		
Developer(s)	Writes code for the ServiceNow platform.		#
Trusted Service Partner(s)	Attends ServiceNow Impact Accelerator coaching session(s) to understand leading practices and potentially support customer going forward.		#

Requested information/access

Please refer to the applicable Impact Accelerator Description available at https://www.servicenow.com/upgrade-schedules.html

Exclusions

This Impact Accelerator in its entirety or portions of the Impact Accelerator activities may not be available to customers in certain restricted environments, to self-hosted customers, or to managed service providers with domain separated instances.

ServiceNow is not responsible for implementing recommendations on Customer's non-production or production instances.

Jumpstart Your Strategic Portfolio Management – Planning Workspace

The Jumpstart Your Strategic Portfolio Management – Planning Workspace Accelerator provides a demonstration of the possibilities and capabilities of Planning Workspaces within Strategic Portfolio Management (SPM).

Overview

Jumpstart Your Strategic Portfolio Management (SPM) – Planning Workspace provides Impact customers with a comprehensive overview of the possibilities and capabilities of the Planning Workspaces in SPM. Our goal is to demonstrate how you can receive clear visibility to manage and prioritize work items effectively and ensure they are aligned with your overall strategic goals. We aim to provide you with an understanding of how Planning Workspace can enhance service delivery quality, efficiency, and costs.

For additional information on SPM, see Strategic Portfolio Management.

Note: This Accelerator is available in Guided, Advanced, and Total Packages.

Offered pursuant to the applicable ServiceNow Impact Package and Accelerator descriptions available at https://www.servicenow.com/legal/servicenow-impact.html.

What you get

Session Preparation

- Provision a temporary instance
- Activate and configure the applicable components of the Planning Workspaces in SPM

Customer Coaching Session #1 (up to 90 minutes)

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Includes the following:

- Overview and demonstration of Planning Workspaces
- Review of setting Planning Workspaces within SPM up for success:
  - Installation and configuration of Planning Workspaces
  - High level discussion on Foundation/Dependent data
- Walk through of key capabilities
- Review business readiness
- Review usage tracking and maintenance leading practices
- Thirty days of access to the temporary instance

Customer Coaching Session #2 (Optional upon Customer request – up to 60 minutes)

Opportunity for Q&A related to Strategic Portfolio Management (SPM) - Planning Workspace

Requested customer resources

Customer resource and responsibilities

Customer Resource	Responsibilities
Platform Owner (Required)	Responsible for the overall accountability of the ServiceNow platform. Provides leadership and oversight to the System Administrators, ensures team alignment to business strategy and the ServiceNow roadmap, and is actively involved in the overarching governance of the platform.
System Administrator(s) (Required)	Maintains the stability and usability of the ServiceNow platform by performing application maintenance, managing support for cases related to ServiceNow applications, and contributing to ServiceNow software releases by delivering configuration tasks and features.
Other Customer Role(s) (Required)	Primary stakeholders responsible for Product and Portfolio management.
Developer(s) (Recommended)	Writes code for the ServiceNow platform.
Trusted Service Partners (Recommended)	Attends ServiceNow Impact Accelerator coaching session(s) to understand leading practices and potentially support customer going forward.

Requested information / access

Refer to the applicable Impact Accelerator description available at https://www.servicenow.com/legal/servicenow-impact.html

Exclusions

This Impact Accelerator in its entirety or portions of the Impact Accelerator activities may not be available to customers in certain restricted environments, to self-hosted customers, or to managed service providers with domain separated instances.

ServiceNow resources are not responsible for implementing SPM Planning Workspace recommendations on Customer's sub-production or production instances.

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Jumpstart Your Strategic Portfolio Management – Resource Management Workspace

The Jumpstart Your Strategic Portfolio Management (SPM) – Resource Management Workspace Accelerator provides a demonstration of the possibilities and capabilities of Resource Management Workspaces within SPM.

Accelerator overview

Jumpstart Your Strategic Portfolio Management – Resource Management Workspace provides Impact customers with a comprehensive overview of the possibilities and capabilities of the Resource Management Workspace in SPM. Our goal is to demonstrate how customers can understand how to prepare and implement Resource Management Workspace, ensuring correct setup of foundation data enabling a consolidated view of their resource allocations and resource request. Additionally, this Accelerator offers key resources and leading practice guides on getting started.

For more information on Resource Management, see Resource Management classic.

Note: This Accelerator is available for Impact Guided, Advanced, and Total packages.

Offered pursuant to the applicable Impact Accelerator Description available at#https://www.servicenow.com/legal/servicenow-impact.html

What you get

Session preparation

- Provision a temporary instance
- Activate and configure the applicable components of Resource Management Workspaces within SPM

Customer coaching session #1 (up to 90 minutes)

Includes the following:

- Overview & demonstration of Resource Management Workspaces
- Review setting Resource Management Workspaces within SPM up for success
  - Installation & configuration
  - High level discussion on Foundation data
- Walkthrough of key capabilities
- Suggestions for re-implementation next steps
- 30 days access to the temporary instance is provided

Customer coaching session #2 (optional upon customer request, up to 60 minutes)

Opportunity for Q&A related to Resource Management Workspace within SPM

Requested customer resources

One or more customer resource is requested. The specific number of resources provided is Accelerator and customer specific.

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Customer resource and responsibilities

Customer resource	Responsibilities	Required	Optional
Platform Owner	Responsible for the overall accountability of the ServiceNow platform. Provides leadership and oversight to the System Administrators, ensures team alignment to business strategy and the ServiceNow roadmap, and is actively involved in the overarching governance of the platform.	#	
System Administrators	Maintains the stability and usability of the ServiceNow platform by performing application maintenance, managing support for cases related to ServiceNow applications, and contributing to ServiceNow software releases by delivering configuration tasks and features.	#	
Stakeholders	Primary stakeholders responsible for Resource Management. E.g., Project Manager/Resource Manager – Individuals who are responsible for making requests for resources and/or collaborate on the allocation and planning of resources.	#	
Developers	Writes code for the ServiceNow platform.		#
Trusted Service Partners	Attends ServiceNow Impact Accelerator coaching session(s) to understand leading practices and potentially support customer going forward.		#

Requested information / access

Refer to the applicable Impact Accelerator description available at https://www.servicenow.com/legal/servicenow-impact.html

Exclusions

This Impact Accelerator in its entirety or portions of the Impact Accelerator activities may not be available to customers in certain restricted environments, to self-hosted customers, or to managed service providers with domain separated instances.

ServiceNow resources are not responsible for implementing recommendations on customer's non-production or production instances.

Jumpstart your Service Operations Workspace

This Accelerator illustrates a demonstration of the possibilities and capabilities of Service Operations Workspace.

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Accelerator Overview

Jumpstart Your Service Operations Workspace Accelerator provides Impact customers with an overview of Service Operations Workspace, which aims to provide a unified workspace for day-to-day IT Service Management (ITSM) operations. An applied demonstration of the possibilities and capabilities via a temporary cloned instance and leading practices on getting started is included.

Note: This Accelerator is available for Impact Guided, Advanced, and Total packages.

Offered pursuant to the applicable ServiceNow Impact Package and Accelerator descriptions available at https://www.servicenow.com/legal/servicenow-impact.html.

What you get

Service Operations Workspace Setup

- Provisioning of a temporary instance
- Activating and configuring Service Operations Workspace

Customer Coaching Session #1 (up to 90 min)

Thirty days of access to the temporary instances

Review of:

- Workspace strategy overview
- Demonstration of Service Operations Workspace
  - Manage incidents, problems, and interactions easily with a unified navigation
  - Improve overall employee experience with personalized, configurable views
  - Collaborate across teams to resolve issues faster
- Key resources and guides

Customer Coaching Session #2 (Optional on Customer request – up to 60 min)

Opportunity for a Questions and Answers session related to Service Operations Workspace

Requested customer resources

Customer resource and responsibilities

Customer Resource	Responsibilities
Platform Owner (Required)	Responsible for the overall accountability of the ServiceNow platform. Provides leadership and oversight to the System Administrators, ensures team alignment to business strategy and the ServiceNow roadmap, and is actively involved in the overarching governance of the platform.
System Administrator(s) (Required)	Maintains the stability and usability of the ServiceNow platform by performing application maintenance, managing support for cases related to ServiceNow applications, and contributing to ServiceNow software releases by delivering configuration tasks and features.

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Customer resource and responsibilities (continued)

Customer Resource	Responsibilities
IT Service Desk Manager (Recommended)	Subject matter expert responsible for managing IT Service Desk.
Service Desk Agent(s) (Recommended)	Subject matter expert(s) responsible for day-to-day ITSM operations.
Trusted Service Partners (Recommended)	Attends ServiceNow Impact Accelerator coaching session(s) to understand leading practices and potentially support customer going forward.

Requested information/access

Please refer to the applicable Impact Accelerator Description available at https://www.servicenow.com/legal/servicenow-impact.html

Exceptions

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ServiceNow is not responsible for implementing [Product] recommendations on Customer's sub-production or production instances.

Jumpstart Your Subscription Management

This accelerator provides a demonstration on how to efficiently manage your ServiceNow subscriptions in the Subscription Management Application.

Accelerator Overview

Jumpstart Your Subscription Management provides Impact customers with an#overview of Subscription Management's key capabilities and features. This offering explores core functionalities and leading practices to help customers understand how to proactively manage their subscriptions using the Subscription Management Application. Additionally, this Accelerator includes key resources for getting started with ServiceNow Subscription Management.

Note: This Accelerator is available for Impact Guided, Guided+ (SV or PG), Advanced, and Total packages.

What you get

Session Preparation

- Provision a temporary instance
- Activate and configure related plug-ins

Customer Coaching Session #1 (up to 90 min)

Includes the following:

- What is Subscription Management?
- Demonstration of capabilities and features of the Subscription Management application

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- Assign Groups to subscriptions
- Map Custom tables and applications
- Allocate available entitlements

- Review leading practices and implementation guidelines
- Temporary instance with 30 days access

Customer Coaching Session #2 (Optional on Customer request – up to 60 min)

Opportunity for Q&A related to ServiceNow Subscription Management

Requested customer resources

Customer Resource	Responsibilities
Platform Owner (Required)	Responsible for the overall accountability of the ServiceNow platform. Leads the System Administrators, ensures team alignment with the ServiceNow business strategy and roadmap, and contributes to platform governance.
System Administrator(s) (Required)	Maintains the stability and usability of the ServiceNow by performing application maintenance, managing support for cases related to ServiceNow applications, and contributing to ServiceNow software releases by delivering configuration tasks and features.
Usage Admin (Recommended)	Administers the allocation of purchased subscriptions.
Trusted Service Partners (Recommended)	Attends one or more ServiceNow Impact Accelerator coaching sessions to understand leading practices and support customers.

Requested information/access

Please refer to the applicable Impact Accelerator Description available at https://www.servicenow.com/upgrade-schedules.html

Exclusions

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ServiceNow is not responsible for implementing recommendations on Customer's non-production or production instances.

Jumpstart Your Success Dashboard

Demonstration of what is possible with the Success Dashboard using your data via a temporary instance.

Overview

The Jumpstart Your Success Dashboard provides Impact Customers with an overview of the Success Dashboard, which aims to help Customers gain visibility into their ITSM and/or HR product success metrics. It includes an applied demonstration of the Success Dashboard, a

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guided tour of its features and benefits via a temporary instance containing your cloned data, and leading practices on getting started.

Offered pursuant to the applicable Impact Accelerator Description

What You Get

Temporary instance (w/cloned instance data)

- Provisioning of a temporary instance
- Enablement and configuration of Success Dashboard

Coaching Session #1 (up to 60 minutes)

- Provide reporting strategy overview
- Demonstrate the ITSM Success Dashboard in temporary instance
  - Performance Quality KPIs
  - Service Quality KPIs
  - Configuration Overview
- Key resources and guides
- Includes 30 days of access to the temporary instance and a Technical Consultant

Coaching Session #2 (optional – up to 60 minutes)

Opportunity for Q&A related to CIO dashboard

Requested Customer Resources

Customer resource and responsibilities

Customer Resource	Responsibilities
Platform Owner- Required	Responsible for the overall accountability of the ServiceNow platform. Provides leadership and oversight to the System Administrators, ensures team alignment to business strategy and the ServiceNow roadmap, and is actively involved in the overarching governance of the platform.
System Administrator(s)- Required	Maintains the stability and usability of the ServiceNow platform by performing application maintenance, managing support for cases related to ServiceNow applications, and contributing to ServiceNow software releases by delivering configuration tasks and features.
Reporting Lead- Recommended	Meets with the ServiceNow Impact Accelerator Consultant, provides access to the required resources, and drives the actions from the engagement.
Developers- Optional	Writes code for the ServiceNow platform.
Trusted Service Partners- Recommended	Attends ServiceNow Impact Accelerator to understand leading practices and potentially support customer going forward.

Requested Information / Access

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Exceptions

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ServiceNow isn't responsible for implementing Success Dashboard recommendations on Customer's non-production or production instances.

Jumpstart Your Task Intelligence

The Jumpstart Your Task Intelligence Accelerator provides a demonstration of the possibilities and capabilities of Task Intelligence.

Overview

Jumpstart Your Task Intelligence enables customers to leverage Task Intelligence to infuse machine learning into customer case management#processes to significantly enhance customer & agent experience. This Accelerator provides an overview of the art of the possible with Task Intelligence, including an applied demonstration of capabilities#, as well as leading practices on getting started. For more information on Task Intelligence, see Task Intelligence.

Note: This Accelerator is available for Impact Guided, Advanced, and Total packages.

Offered pursuant to the applicable ServiceNow Impact Package and Accelerator descriptions available at https://www.servicenow.com/legal/servicenow-impact.html.

What You Get

Session Preparation

- Provision a temporary instance
- Activate and configure Task Intelligence
- Analyze current case data

Customer Coaching Session #1 (Up to 90 minutes)

Includes the following:

- An overview of Task Intelligence and solution configuration:
  - Auto-Categorization
  - Language Detection
  - Sentiment Analysis
- Demonstration of functionality and tuning
- Discussing data cleansing leading practices
- Key resources and guides
- 30 days of access to the temporary instance is provided.

Customer Coaching Session #2 (Optional upon Customer request - up to 60 minutes)

Opportunity for Q&A related to Task Intelligence

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Requested Customer Resources

Customer resource and responsibilities

Customer Resource	Responsibilities
Platform Owner (Required)	Responsible for the overall accountability of the ServiceNow platform. Provides leadership and oversight to the System Administrators, ensures team alignment to business strategy and the ServiceNow roadmap, and is actively involved in the overarching governance of the platform.
System Administrator(s) (Required)	Maintains the stability and usability of the ServiceNow platform by performing application maintenance, managing support for cases related to ServiceNow applications, and contributing to ServiceNow software releases by delivering configuration tasks and features.
Service Desk Manager(s) (Recommended)	Subject matter expert responsible for managing the Service Desk(s).
Developer(s) (Recommended)	Writes code for the ServiceNow platform.
Customer Service Agent(s) (Recommended)	Subject matter expert responsible for ServiceNow Customer Service.
Trusted Service Partners (Recommended)	Attends ServiceNow Impact Accelerator coaching session(s) to understand leading practices and potentially support customer going forward.

Requested Information

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ServiceNow is not responsible for implementing Task Intelligence recommendations on Customer's sub-production or production instances.

Jumpstart Your Upgrade

Guidance on upgrade planning and preparation

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Accelerator Overview

Jumpstart Your Upgrade provides Impact Customers with guidance, tips, and tools to execute a ServiceNow upgrade. It enables Customers to upgrade by helping them understand leading practices as well as giving them an opportunity to see what their instance looks like upgraded in a temporary instance.

Offered pursuant to the applicable Impact Accelerator Description available at https://www.servicenow.com/legal/servicenow-impact.html

What You Get

Upgrade Assessment

- Provisioning of a pre-upgraded temporary instance
- Upgrade assessment using ServiceNow HealthScan

Customer Coaching Session #1 (up to 60 min)

Review of:

- Temporary instance
- Upgrade leading practices
- Upgrade assessment review
- Skipped log guidance
- Release notes & Known PRBs
- Utilizing Automated Testing Framework (ATF)
- Sample upgrade project plan

Customer Coaching Session #2 (Optional upon Customer request – up to 60 min)

- Opportunity for Q&A related to upgrades
- Provide additional guidance on leading practices and upgrade assessment

Requested Customer Resources

Customer resource and responsibilities

Customer Resource	Responsibilities
Upgrade Lead - Required	Subject matter expert responsible for upgrading the ServiceNow platform.
System Administrator(s)- Required	Maintains the stability and usability of the ServiceNow platform by performing application maintenance, managing support for cases related to ServiceNow applications, and contributing to ServiceNow software releases by delivering configuration tasks and features.
Enterprise Architect(s) - Recommended	Provides a holistic view of the organization's strategy, processes, and other systems, including any necessary policy or organizational requirements. Helps guide the Platform Owner to align with technical or functional standards.

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Customer resource and responsibilities (continued)

Customer Resource	Responsibilities
Developer(s) - Recommended	Writes code for the ServiceNow platform.

Requested Information / Access

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Exceptions

This Impact Accelerator in its entirety or portions of the Impact Accelerator Activities may not be available to customers in the FedRAMP, NSC DOD IL5, or Australia IRAP-Protected data centers, to self-hosted customers, or in other restricted environments.

ServiceNow is not responsible for implementing the applicable upgrade on Customer's sub-production or production instances.

Jumpstart Your Virtual Agent

This accelerator provides guidance on realizing benefits with the ITSM Virtual Agent.

Overview

Jumpstart Your Virtual Agent provides Impact Customers with an applied demonstration of ITSM Virtual Agent capabilities. This includes a technical overview of how to set up ITSM Virtual Agent, resources, training, and services available to successfully implement ITSM Virtual Agent. It aims to help Customers remove barriers and accelerate Virtual Agent adoption by demonstrating ITSM Virtual Agent capabilities in a temporary instance, which is a clone of the Customer's selected production environment.

Offered pursuant to the applicable Impact Accelerator Description available at https://www.servicenow.com/legal/servicenow-impact.html

What you get

Virtual Agent Activation

- Provisioning of a temporary instance
- Virtual Agent plugin activation
- Execution of Virtual Agent topic recommendations and related tools
- Activation of core topics
- Collaboration tool and Live Agent demo setup

Customer Coaching Session #1 (up to 120 min)

Review of:

- What is Virtual Agent
- Applied demo
- Process overview
- Review 'what was done'
- Plugins

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- Virtual Agent topic recommendations and related tools
- Key implementation resources

Customer Coaching Session #2 (Optional upon Customer request – up to 60 min)

- Opportunity for Q&A related to ITSM Virtual Agent
- Provide additional guidance on implementation resources and process, plugins, findings

Requested customer resources

Customer resource and responsibilities

Customer Resource	Responsibilities
ITSM Virtual Agent Lead - Required	Subject matter expert responsible for implementing ITSM Virtual Agent.
IT Service Desk Manager - Recommended	Subject matter expert responsible for managing IT Service Desk.
System Administrator(s) - Recommended	Maintains the stability and usability of the ServiceNow platform by performing application maintenance, managing support for cases related to ServiceNow applications, and contributing to ServiceNow software releases by delivering configuration tasks and features.
Enterprise Architect(s) - Recommended	Provides a holistic view of the organization's strategy, processes, and other systems, including any necessary policy or organizational requirements. Helps guide the Platform Owner to align with technical or functional standards.
Developer(s) - Recommended	Writes code for the ServiceNow platform.

Requested information/access

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Exceptions

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ServiceNow is not responsible for implementing ITSM Virtual Agent recommendations on Customer's sub-production or production instances.

Jumpstart Your Workflow Automation: Playbooks

This accelerator provides a demonstration of the possibilities and capabilities of Playbooks in Workflow Studio.

Accelerator Overview

Jumpstart Your Workflow Automation: Playbooks provides Impact customers with an overview and applied demonstration of Workflow Studio and its Playbooks feature. This session reduces friction and makes the tool accessible to users of all skill levels. Customers learn to manage and

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create their own playbooks, driving greater efficiency in their business processes. In addition, this accelerator includes key resources and leading practice guides to help customers get started.

Note: This Accelerator is available for Impact Guided, Guided+ (SV or PG), Advanced, and Total packages.

What you get

Session Preparation

- Provisioning of a temporary instance
- Activate and configure Playbooks

Customer Coaching Session #1 (up to 90 min)

Includes the following:

- What are Playbooks?
- Why use Playbooks?
- Key Playbook capabilities
- Demonstration of Playbooks and associated features
- Temporary instance with 30 days provided access

Customer Coaching Session #2 (Optional upon Customer request – up to 60 min)

Opportunity for Q&A related to Playbooks in Workflow Studio.

Requested customer resources

Customer Resource	Responsibilities	Required	Recommended
Platform Owner	Responsible for the overall accountability of the ServiceNow platform. Provides leadership and oversight to the System Administrators, ensures team alignment to business strategy and the ServiceNow roadmap, and is actively involved in the overarching governance of the platform.	#	
System Administrator(s)	Maintains the stability and usability of the ServiceNow platform by performing application maintenance, managing support for cases related to ServiceNow applications, and contributing to ServiceNow software releases by delivering configuration tasks and features.	#	

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Customer Resource	Responsibilities	Required	Recommended
Process Owner(s)	A senior leader within each business unit for each major process or service (Example: incident, change, employee onboarding) who is accountable for ensuring the process is fit for purpose.	#	
Developer(s)	Writes code for the ServiceNow platform.		#
Trusted Service Partners -	Attends ServiceNow Impact Accelerator coaching session(s) to understand leading practices and potentially support customer going forward.		#

Requested information/access

Please refer to the applicable Impact Accelerator Description available at https://www.servicenow.com/upgrade-schedules.html

Exclusions

This Impact Accelerator in its entirety or portions of the Impact Accelerator activities may not be available to customers in certain restricted environments or to self-hosted customers.

ServiceNow is not responsible for implementing recommendations on Customer's non-production or production instances.

TuneUp Your AI Search

This accelerator provides guidance on fine-tuning artificial intelligent (AI) Search to optimize performance and value.

Accelerator Overview

TuneUp Your AI Search Accelerator provides Impact customers with an assessment of AI Search performance and prescriptive guidance to optimize results and improve end-user experience. Included is an assessment of AI Search architecture and configuration, tuning AI Search, an overview of AI Search analytics, and prescriptive guidance on how to optimize performance.

See AI Search for additional information on AI Search.

Note: This Accelerator is available for Impact Guided, Advanced, and Total packages.

Offered pursuant to the applicable ServiceNow Impact Package and Accelerator descriptions available at https://www.servicenow.com/legal/servicenow-impact.html.

What You Get

AI Search Assessment

- Provisioning of a temporary instance
- Updates to AI Search plugin
- Assessment of current state of AI Search settings and performance

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Customer Coaching Session #1 (up to 90 minutes)

Customer provided 30 days of access to the temporary instance

Review of:

- AI Search architecture and configuration leading practices
- AI Search tuning (Synonym Dictionary and Query Rules)
- Overview of AI Search analytics
- Prescriptive guidance to optimize performance

Customer Coaching Session #2 (Optional upon Customer request, up to 60 minutes)

Opportunity for Questions and Answers related to AI Search performance

Requested Customer Resources

Customer resource and responsibilities

Customer Resource	Responsibilities	Required	Recommended
Platform Owner	Responsible for the overall accountability of the ServiceNow platform. Provides leadership and oversight to the System Administrators, ensures team alignment to business strategy and the ServiceNow roadmap, and is actively involved in the overarching governance of the platform.	#	
Virtual Agent Lead	Subject matter expert responsible for ServiceNow ITSM Virtual Agent.	#	
System Administrator(s)	Maintains the stability and usability of the ServiceNow platform by performing application maintenance, managing support for cases related to ServiceNow applications, and contributing to ServiceNow software releases by delivering configuration tasks and features.	#	

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Customer resource and responsibilities (continued)

Customer Resource	Responsibilities	Required	Recommended
Developer(s)	Writes code for the ServiceNow platform.	#	
Trusted Service Partners	Attends ServiceNow Impact Accelerator coaching session(s) to understand leading practices and potentially support customer going forward.		#

Requested Information

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ServiceNow is not responsible for implementing any of the recommended configuration changes in Customer's sub-production or production instances.

TuneUp Your Configuration Management Database

The TuneUp Your Configuration Management Database (CMDB) Accelerator provides insight and guidance to improve CMDB health.

Overview

TuneUp Your CMDB provides Impact Customers with an analysis of common CMDB problem areas through HealthScan along with recommendations on how to address those findings. It helps gain insight into CMDB health and leading practices and ultimately aims to assist you in improving the effectiveness of your instance data foundation. See Configuration Management for information on CMDB.

Note: This Accelerator is available for Impact Guided, Advanced, and Total packages.

Offered pursuant to the applicable ServiceNow Impact Package and Accelerator descriptions available at https://www.servicenow.com/legal/servicenow-impact.html.

What you get

CMDB Assessment

- Provisioning of a temporary instance
- CMDB assessment using ServiceNow HealthScan

Customer Coaching Session #1 (up to 90 min)

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Review of:

- Temporary instance
- CMDB scorecard
- Problem or deficient areas
- Recommended actions to remediate

Customer Coaching Session #2 (Optional upon Customer request – up to 60 min)

- Opportunity for Q&A related to CMDB findings
- Provide additional guidance on leading practices and CMDB scorecard

Requested customer resources

Customer resource and responsibilities

Customer Resource	Responsibilities
CMDB Lead / Configuration Manager - Required	Subject matter expert responsible for maintaining the CMDB
System Administrator(s) - Recommended	Maintains the stability and usability of the ServiceNow platform by performing application maintenance, managing support for cases related to ServiceNow applications, and contributing to ServiceNow software releases by delivering configuration tasks and features.
Enterprise Architect(s) - Recommended	Provides a holistic view of the organization's strategy, processes, and other systems, including any necessary policy or organizational requirements. Helps guide the Platform Owner to align with technical or functional standards.
Developer(s) - Recommended	Writes code for the ServiceNow platform.

Requested information/access

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Exceptions

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ServiceNow is not responsible for implementing any of the recommended CMDB configuration changes in Customer's sub-production or production instances.

TuneUp Your Employee Center

The TuneUp Your Employee Center Accelerator provides guidance on maintaining and governing your ServiceNow Employee Center health to optimize value.

Accelerator overview

TuneUp Your Employee Center provides Impact customers with an assessment of their current Employee Center implementation. Through careful analysis, we offer valuable insights and

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recommendations to enhance the health of their implementation while providing an opportunity to understand untapped value where enhanced capabilities are not yet deployed. Additionally, this Accelerator equips our customers with essential ServiceNow resources and leading practices guides on how to best increase adoption and usage of Employee Center.

For additional information, see Employee Center.

This feature is available for packages such as Impact Advanced and Impact Total along with the Impact Guided package and Strategic Value or Platform Governance, as add-on.

Offered pursuant to the applicable ServiceNow Impact Package and Accelerator descriptions available at https://www.servicenow.com/legal/servicenow-impact.html.

What you get

Session preparation

- Provision a temporary instance
- Run HealthScan

Customer coaching session #1 (up to 90 minutes)

Includes the following:

- Overview of advanced Employee Center capabilities
- HealthScan findings review
- Key maintenance activities discussion
- Key resources and guides on leading practices
- 30 days access to the temporary instance

Customer coaching session #2 (optional upon customer request, up to 60 minutes)

Opportunity for Q&A related to Employee Center

Requested customer resources

One or more customer resource is requested. The specific number of resources provided is Accelerator and customer specific.

Customer resource and responsibilities

Customer resource	Responsibilities	Required	Optional
Platform Owner	Responsible for the overall accountability of the ServiceNow platform. Provides leadership and oversight to the System Administrators, ensures team alignment to business strategy and the ServiceNow roadmap, and is actively involved in the overarching governance of the platform.	#	
System Administrators	Maintains the stability and usability of the ServiceNow platform by performing application maintenance, managing support for cases related to ServiceNow applications, and	#	

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Customer resource and responsibilities (continued)

Customer resource	Responsibilities	Required	Optional
	contributing to ServiceNow software releases by delivering configuration tasks and features.		
UX and OCM Experts	Primary stakeholders for user experience and organizational change management.		#
Developers	Writes code for the ServiceNow platform.		#
Other Customer Roles	Other Customer Roles		#
Trusted Service Partners	Attends ServiceNow Impact Accelerator coaching session(s) to understand leading practices and potentially support customer going forward.		#

Requested information / access

Refer to the applicable Impact Accelerator description available at https://www.servicenow.com/legal/servicenow-impact.html

Exclusions

This Impact Accelerator in its entirety or portions of the Impact Accelerator activities may not be available to customers in certain restricted environments, to self-hosted customers, or to managed service providers with domain separated instances.

ServiceNow resources are not responsible for implementing recommendations on Customer's sub-production or production instances.

TuneUp Your Hardware Asset Management

The TuneUp Your Hardware Asset Management (HAM) Accelerator provides guidance on maintaining and governing Hardware Asset Management health to optimize value.

Overview

TuneUp#Your Hardware Asset Management provides Impact customers with an assessment of their current HAM implementation. This Accelerator includes an#applied demonstration of HAM capabilities to standardize asset lifecycle. Customers obtain assistance for better insight into their HAM investment and#are provided leading practices on how to best increase adoption and usage.

See Hardware Asset Management for additional information about HAM.

Note: This Accelerator is available for Impact Guided, Advanced, and Total packages.

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What you get

Session preparation

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- Provisioning a temporary instance
- Running HAM HealthScan portfolio
- Installing or updating the HAM plugin

Customer coaching session #1 (up to 90 minutes)

- Includes the following:
  - Overview of advanced HAM capabilities and features
  - Review HealthScan findings
  - Provide leading practices guides and resources
- Access to the provisioned temporary instance is granted for 30 days

Customer coaching session #2 (Optional upon customer request – up to 60 minutes)

Opportunity for Q&A related to Hardware Asset Management

Requested customer resources

Customer resource and responsibilities

Customer Resource	Responsibilities
Platform Owner (Required)	Responsible for the overall accountability of the ServiceNow platform. Provides leadership and oversight to the System Administrators, ensures team alignment to business strategy and the ServiceNow roadmap, and is actively involved in the overarching governance of the platform.
System Administrator(s) (Required)	Maintains the stability and usability of the ServiceNow platform by performing application maintenance, managing support for cases related to ServiceNow applications, and contributing to ServiceNow software releases by delivering configuration tasks and features.
CMDB Administrator(s) (Required)	Subject matter expert responsible for maintaining the CMDB.
HAM Administrator(s) (Recommended)	Subject matter expert responsible for managing HAM.
Process Owner(s) (Recommended)	A senior leader within each business unit for each major process or service (e.g., incident, change, employee onboarding) who is accountable for ensuring the process is fit for purpose.
Service Manager(s) (Recommended)	Subject matter expert responsible for managing the applicable service.
Trusted Service Partners (Recommended)	Attends ServiceNow Impact Accelerator coaching session(s) to understand leading practices and potentially support customer going forward.

Requested information/access

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Exclusions

This Impact Accelerator in its entirety or portions of the Impact Accelerator Activities may not be available to customers in some restricted environments, to self-hosted customers, or in other restricted environments, or to managed service providers, except for their internal use.

ServiceNow resources are not responsible for implementing recommendations on customer sub-production or production instances.

TuneUp Your IT Asset Management

Provides prescriptive guidance to improve IT Asset Management (ITAM) health.

Overview

This accelerator provides Impact Customers with an analysis of common IT Asset Management problem areas through HealthScan along with recommendations on addressing those findings. It aims to help customers understand how to identify problem areas within your ITAM setup, including a review of the top challenging areas and leading practices on how to best remediate gaps.

Note: This Accelerator is available for Impact Guided, Advanced, and Total packages.

Offered pursuant to the applicable Impact Accelerator Description available at https://www.servicenow.com/legal/servicenow-impact.html

What you get

IT Asset Management Assessment

- Provisioning of a temporary instance
- Running ITAM HealthScan portfolio
- Analysis of ITAM health findings

Customer Coaching Session #1 (up to 60 min)

- Access to the provisioned temporary instance is granted for 30 days
- Review the following:
  - Importance of IT Asset Management
  - ITAM health analysis
  - Prioritized problem or deficient areas (up to 3)
  - Leading practices and recommended actions to remediate gaps

Customer Coaching Session #2 (Optional upon Customer request – up to 60 min)

Opportunity for Q&A related to IT Asset Management

Requested customer resources

Customer resource and responsibilities

Customer Resource	Responsibilities
Platform Owner (Required)	Responsible for the overall accountability of the ServiceNow platform. Provides leadership and oversight to the System Administrators, ensures team alignment to business strategy

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Customer resource and responsibilities (continued)

Customer Resource	Responsibilities
	and the ServiceNow roadmap, and is actively involved in the overarching governance of the platform.
System Administrator(s) (Required)	Maintains the stability and usability of the ServiceNow platform by performing application maintenance, managing support for cases related to ServiceNow applications, and contributing to ServiceNow software releases by delivering configuration tasks and features.
Asset Manager (Required)	Primary stakeholder for Asset Management.
Trusted Service Partners (Recommended)	Attends ServiceNow Impact Accelerator coaching session(s) to understand leading practices and potentially support customer going forward.

Requested information/access

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ServiceNow is not responsible for implementing IT Asset Management recommendations on Customer's sub-production or production instances.

TuneUp Your ITOM Discovery

Provides insight and guidance to improve the health of your Configuration Management Database (CMDB) through IT Operations Management (ITOM) Discovery.

Accelerator Overview

TuneUp Your ITOM Discovery provides Impact Customers with an analysis of common ITOM discovery areas through HealthScan along with recommendations on addressing those findings. Obtain assistance to gain better insight into your CMDB implementation, including a review of the top challenging areas and leading practices on how to best remediate gaps.

Note: This Accelerator is available for Impact Guided, Advanced, and Total packages.

Offered pursuant to the applicable Impact Accelerator Description available at https://www.servicenow.com/legal/servicenow-impact.html

What you get

ITOM Discovery Assessment

- Provisioning of a temporary instance
- ITOM Discovery HealthScan portfolio conducted
- Analysis of ITOM Discovery health findings

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Customer Coaching Session #1 (up to 60 min)

- Access to the provisioned temporary instance is granted for 30 days
- Review the following:
  - Importance of Discovery and CMDB health
  - ITOM Discovery health analysis
  - Prioritized problem or deficient areas (up to 3)
  - Leading practices and recommended actions to remediate gaps

Customer Coaching Session #2 (Optional upon Customer request – up to 60 min)

Opportunity for Q&A related to CMDB Discovery

Requested customer resources

Customer resource and responsibilities

Customer Resource	Responsibilities
Platform Owner (Required)	Responsible for the overall accountability of the ServiceNow platform. Provides leadership and oversight to the System Administrators, ensures team alignment to business strategy and the ServiceNow roadmap, and is actively involved in the overarching governance of the platform.
System Administrator(s) (Required)	Maintains the stability and usability of the ServiceNow platform by performing application maintenance, managing support for cases related to ServiceNow applications, and contributing to ServiceNow software releases by delivering configuration tasks and features.
Discovery Admin (Required)	Primary stakeholder for Discovery.
Trusted Service Partners (Recommended)	Attends ServiceNow Impact Accelerator coaching session(s) to understand leading practices and potentially support customer going forward.

Requested information/access

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ServiceNow is not responsible for implementing ITOM Discovery recommendations on Customer's sub-production or production instances.

TuneUp Your Platform Analytics

The TuneUp Your Platform Analytics Accelerator provides guidance on maintaining and governing Platform Analytics health to optimize value.

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Overview

TuneUp Your Platform Analytics provides Impact customers with an assessment of their current Platform Analytics implementation. This offering includes an applied demonstration of the capabilities of advanced Platform Analytics configuration, including Performance Analytics, Workspaces, and User Experience Analytics. We aim to assist you in obtaining better insight into your Platform Analytics investment and provide leading practices on how to best increase adoption and utilization.

Note: This Accelerator is available for Impact Guided, Advanced, and Total packages.

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What you get

Session Preparation

- Provisioning of a temporary instance
- Platform Analytics HealthScan analysis
- Activation and configuration of Platform Analytics Content Packs for one of the selected applications, ITSM, SAM, SPM, CSM, or HR

Customer Coaching Session #1 (up to 90 min)

Includes the following:

- Overview and demonstrate Platform Analytics
- Set up Platform Analytics for success:
  - Review comparisons to the base system implementation
  - Create custom metrics and jobs
- Walk through the following:
  - Advanced table and Performance Analytics
  - Workspace and User Experience capabilities
- Discuss housekeeping and maintenance leading practices
- Thirty days of access granted to the temporary instance

Customer Coaching Session #2 (Optional upon Customer request – up to 60 min)

Opportunity for Q&A related to Platform Analytics

Requested customer resources

Customer resource and responsibilities

Customer Resource	Responsibilities
Platform Owner (Required)	Responsible for the overall accountability of the ServiceNow platform. Provides leadership and oversight to the System Administrators, ensures team alignment to business strategy and the ServiceNow roadmap, and is actively involved in the overarching governance of the platform.

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Customer resource and responsibilities (continued)

Customer Resource	Responsibilities
System Administrator(s) (Required)	Maintains the stability and usability of the ServiceNow platform by performing application maintenance, managing support for cases related to ServiceNow applications, and contributing to ServiceNow software releases by delivering configuration tasks and features.
Reporting Lead(s) (Required)	Meets with the ServiceNow Impact Accelerator Consultant, provides access to the required resources, and drives the actions from the engagement.
Process/Service Owner(s) (Recommended)	A senior leader within each business unit for each major process or service (e.g., incident, change, employee onboarding) who is accountable for ensuring the process is fit for purpose.
Developer(s) (Recommended)	Writes code for the ServiceNow platform.
Process Lead(s) (Recommended)	Subject matter expert responsible for managing the applicable process.
Service Manager(s) (Recommended)	Subject matter expert responsible for managing the applicable service.
Trusted Service Partners (Recommended)	Attends ServiceNow Impact Accelerator coaching session(s) to understand leading practices and potentially support customer going forward.

Requested information / access

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ServiceNow resources are not responsible for implementing Platform Analytics recommendations on Customer's sub-production or production instances.

TuneUp Your Security

Guidance on platform security

Overview

TuneUp Your Security provides Impact customers with insight into their existing ServiceNow instance security configurations, instance security leading practices, and a demonstration on which instance security settings may be enabled to further enhance instance security. It aims to help customers better understand security configuration changes in the context of ServiceNow's published security guidance.

Note: This Accelerator is available in Guided, Advanced, and Total Packages.

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What you get

Security Assessment

- Provisioning of a temporary instance
- Review of customer's Security Center
- Security configuration assessment using ServiceNow HealthScan
- Simulation of recommended security configuration changes in temporary instance

Customer Coaching Session #1 (up to 90 min)

Review of:

- Temporary instance
- Security configuration guidance
- ISC score
- Findings and recommendations
- Simulated recommended changes in temporary instance

Customer Coaching Session #2 (Optional upon Customer request – up to 60 min)

Opportunity for Q&A related to instance security configurations

Requested customer resources

Customer resource and responsibilities

Customer Resource	Responsibilities
ServiceNow Security Lead-Required	Subject matter expert responsible for ServiceNow instance security.
Office of the CISO representative - Required	Responsible for the organizations security policies, processes, practices, and technologies. Helps guide the Platform Owner to align with security standards.
System Administrator(s) - Recommended	Maintains the stability and usability of the ServiceNow platform by performing application maintenance, managing support for cases related to ServiceNow applications, and contributing to ServiceNow software releases by delivering configuration tasks and features.
Enterprise Architect(s) - Recommended	Provides a holistic view of the organization's strategy, processes, and other systems, including any necessary policy or organizational requirements. Helps guide the Platform Owner to align with technical or functional standards.
Developer(s) - Recommended	Writes code for the ServiceNow platform.

Requested information/access

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ServiceNow is not responsible for implementing any of the recommended security configuration changes in Customer's sub-production or production instances.

TuneUp Your Software Asset Management

The TuneUp Your Software Asset Management (SAM) Accelerator provides guidance on maintaining and governing Software Asset Management health to optimize value.

Overview

TuneUp#Your Software Asset Management provides Impact customers with an assessment of their current SAM implementation. This Accelerator includes#an#applied demonstration of SAM capabilities to reduce IT costs and limit various risks#through managing and optimizing software assets across the customer's lifecycle.#Customers obtain assistance for better insight into their SAM investment and#are provided leading practices on how to best increase adoption and usage.

See Software Asset Management for additional information about SAM.

Note: This Accelerator is available for Impact Guided, Advanced, and Total packages.

Offered pursuant to the applicable Impact Accelerator Description available at https://www.servicenow.com/legal/servicenow-impact.html

What you get

Session preparation

- Provisioning a temporary instance
- Running SAM HealthScan portfolio
- Activation of all SAM Professional plugins, including Software Asset Workspace
- Activation of the ITAM Health Check application

Customer coaching session #1 (up to 90 minutes)

- Includes the following:
  - Overview of advanced SAM capabilities and features
  - Review HealthScan and Health Check findings
  - Provide leading practices guide and resources
- Access to the provisioned temporary instance is granted for 30 days

Customer coaching session #2 (optional upon customer request – up to 60 minutes)

Opportunity for Q&A related to Software Asset Management

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Requested customer resources

Customer resource and responsibilities

Customer Resource	Responsibilities
Platform Owner (Required)	Responsible for the overall accountability of the ServiceNow platform. Provides leadership and oversight to the System Administrators, ensures team alignment to business strategy and the ServiceNow roadmap, and is actively involved in the overarching governance of the platform.
System Administrator(s) (Required)	Maintains the stability and usability of the ServiceNow platform by performing application maintenance, managing support for cases related to ServiceNow applications, and contributing to ServiceNow software releases by delivering configuration tasks and features.
CMDB Administrator(s) (Required)	Subject matter expert responsible for maintaining the CMDB.
SAM Administrator(s) (Recommended)	Subject matter expert responsible for managing SAM.
Process Owner(s) (Recommended)	A senior leader within each business unit for each major process or service (e.g., incident, change, employee onboarding) who is accountable for ensuring the process is fit for purpose.
Service Manager(s) (Recommended)	Subject matter expert responsible for managing the applicable service.
Trusted Service Partners (Recommended)	Attends ServiceNow Impact Accelerator coaching session(s) to understand leading practices and potentially support customer going forward.

Requested information/access

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Exclusions

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ServiceNow resources are not responsible for implementing recommendations on a customer's sub-production or production instances.

TuneUp Your Virtual Agent

The TuneUp Your Virtual Agent Accelerators provide guidance for various aspects of Virtual Agent on your ServiceNow platform.

- TuneUp Your Virtual Agent - Assessment
- TuneUp Your Virtual Agent – NLU (Natural Language Understanding)

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- TuneUp Your Virtual Agent – Performance Monitoring
- TuneUp Your Virtual Agent – UX (User Experience)

TuneUp Your Virtual Agent - Assessment

The TuneUp Your Virtual Agent - Assessment Accelerator provides guidance on fine-tuning Virtual Agent setup to optimize value.

Overview

The TuneUp Your Virtual Agent - Assessment Accelerator provides Impact customers with an assessment of Virtual Agent with leading practices and prescriptive guidance to enhance Virtual Agent setup. Reviewing the Virtual Agent assessment readout, recommendations to improve Virtual Agent topics, and exploring additional capabilities designed to optimize value from Virtual Agent are included.

See Virtual Agent for additional information on Virtual Agent.

Note: This Accelerator is available for Impact Advanced and Total packages.

Offered pursuant to the applicable ServiceNow Impact Package and Accelerator descriptions.

What You Get

Virtual Agent Assessment

- Provisioning of a temporary instance
- Activating or upgrading and configuring necessary plugins
- Assessing the overall state of Virtual Agent

Customer Coaching Session #1 (up to 90 minutes)

Customer provided 30 days of access to the temporary instance

Review of:

- Virtual Agent recommendations
- What defines a good chatbot?
- Virtual Agent assessment readout
- Demonstration of Virtual Agent recommendations
- Identifying automation & deflection opportunities
- Leading practice recommendations and resources

Customer Coaching Session #2 (Optional upon Customer request, up to 60 minutes)

Opportunity for Questions and Answers related to Virtual Agent Assessment

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Requested Customer Resources

Customer resource and responsibilities

Customer Resource	Responsibilities
Virtual Agent Lead (Required)	Subject matter expert responsible for ServiceNow ITSM Virtual Agent.
System Administrator(s) (Required)	Maintains the stability and usability of the ServiceNow platform by performing application maintenance, managing support for cases related to ServiceNow applications, and contributing to ServiceNow software releases by delivering configuration tasks and features.
Developer(s) (Required)	Writes code for the ServiceNow platform.
Trusted Service Partners (Recommended)	Attends ServiceNow Impact Accelerator coaching session(s) to understand leading practices and potentially support customer going forward.

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ServiceNow is not responsible for implementing any of the recommended configuration changes in Customer's sub-production or production instances.

TuneUp Your Virtual Agent – NLU (Natural Language Understanding)

TuneUp Your Virtual Agent – NLU (Natural Language Understanding) Accelerator provides guidance on fine-tuning NLU models to optimize value.

Overview

The TuneUp Your Virtual Agent – NLU Accelerator provides Impact customers with an assessment of Model design and performance with prescriptive guidance to address and improved the Virtual Agent experience. An assessment of the current state of Virtual Agent NLU models, an overview of leading practices, a deep-dive into NLU features, and recommendations on how best to continuously improve performance are included.

See Virtual Agent for additional information on Virtual Agent.

Note: This Accelerator is available in *Advanced, and Total* packages.

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What You Get

NLU Assessment

- Provisioning of a temporary instance
- Activating or upgrading and configuring necessary plugins
- Assessment the overall state of NLU Models

Customer Coaching Session #1 (up to 90 minutes)

Customer provided 30 days of access to the temporary instance

Review of:

- Overview of NLU design
- Assessment of current NLU Models
- NLU leading practices (Training Utterances, Entities, and Vocabulary)
- Demonstrate NLU Advanced Features
- Prescriptive recommendations to improve and maintain Models

Customer Coaching Session #2 (Optional upon Customer request, up to 60 minutes)

Opportunity for Questions and Answers related to Virtual Agent NLU Models

Requested Customer Resources

Customer Resource	Responsibilities
Virtual Agent Lead (Required)	Subject matter expert responsible for ServiceNow ITSM Virtual Agent.
System Administrator(s) (Required)	Maintains the stability and usability of the ServiceNow platform by performing application maintenance, managing support for cases related to ServiceNow applications, and contributing to ServiceNow software releases by delivering configuration tasks and features.
Developer(s) (Required)	Writes code for the ServiceNow platform.
Trusted Service Partners (Recommended)	Attends ServiceNow Impact Accelerator coaching session(s) to understand leading practices and potentially support customer going forward.

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to self-hosted customers, or in other restricted environments, or to managed service providers (except for their internal#use).

ServiceNow is not responsible for implementing any of the recommended configuration changes in Customer's sub-production or production instances.

TuneUp Your Virtual Agent – Performance Monitoring

The TuneUp Your Virtual Agent – Performance Monitoring Accelerator provides guidance on fine-tuning Virtual Agent performance to optimize value.

Overview

The TuneUp Your Virtual Agent – Performance Monitoring Accelerator provides Impact customers with a performance assessment of Virtual Agent with prescriptive guidance on tools to leverage that measure success and identify improvement opportunities. Reviewing dashboards and related tools then providing recommendations on how best to improve and optimize value from Virtual Agent.

See Virtual Agent for additional information on Virtual Agent.

Note: This Accelerator is available in *Advanced, and Total* packages.

Offered pursuant to the applicable ServiceNow Impact Package and Accelerator descriptions.

What You Get

Virtual Agent Performance Assessment

- Provisioning of a temporary instance
- Activating or upgrading and configuring necessary plugins
- Assessing the performance of Virtual Agent

Customer Coaching Session #1 (up to 90 minutes)

Customer provided 30 days of access to the temporary instance

Review of:

- Overview of measuring Virtual Agent success
- Virtual Agent maintenance leading practices
- Virtual Agent dashboards, metrics, and surveys
- Natural Language Understanding (NLU) performance review
- Virtual Agent interaction tables review

Customer Coaching Session #2 (Optional upon Customer request, up to 60 minutes)

Opportunity for Questions and Answers related to Virtual Agent NLU Models

Requested Customer Resources

Customer Resource	Responsibilities
Virtual Agent Lead (Required)	Subject matter expert responsible for ServiceNow ITSM Virtual Agent.

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Customer Resource	Responsibilities
System Administrator(s) (Required)	Maintains the stability and usability of the ServiceNow platform by performing application maintenance, managing support for cases related to ServiceNow applications, and contributing to ServiceNow software releases by delivering configuration tasks and features.
Developer(s) (Required)	Writes code for the ServiceNow platform.
Trusted Service Partners (Recommended)	Attends ServiceNow Impact Accelerator coaching session(s) to understand leading practices and potentially support customer going forward.

Requested Information

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ServiceNow is not responsible for implementing any of the recommended configuration changes in Customer's sub-production or production instances.

TuneUp Your Virtual Agent – UX (User Experience)

The TuneUp Your Virtual Agent – UX (User Experience) Accelerator provides guidance on fine-tuning Virtual Agent conversations to optimize value.

Overview

The TuneUp Your Virtual Agent – UX Accelerator provides Impact customers with an assessment of the Virtual Agent setup from the end user's perspective with prescriptive guidance to address and improve the Virtual Agent experience. An analysis of the user experience, an overview of Conversational Design leading practices, and recommendations on how best to improve are included.

See Virtual Agent for additional information on Virtual Agent.

Note: This Accelerator is available in *Guided, Advanced, and Total* packages.

Offered pursuant to the applicable ServiceNow Impact Package and Accelerator descriptions.

What You Get

Virtual Agent User Experience Assessment

- Provisioning of a temporary instance
- Activating or upgrading and configuring necessary plugins
- Assessing the Virtual Agent user experience

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Customer Coaching Session #1 (up to 90 minutes)

Customer provided 30 days of access to the temporary instance

Review of:

- Conversational Design leading practices
- Designing effective conversations
- Demonstration of conversational design leading practices
- Prescriptive guidance on how to enhance experience

Customer Coaching Session #2 (Optional upon Customer request, up to 60 minutes)

Opportunity for Questions and Answers related to Virtual Agent user experience

Requested Customer Resources

Customer Resource	Responsibilities
Virtual Agent Lead (Required)	Subject matter expert responsible for ServiceNow ITSM Virtual Agent.
System Administrator(s) (Required)	Maintains the stability and usability of the ServiceNow platform by performing application maintenance, managing support for cases related to ServiceNow applications, and contributing to ServiceNow software releases by delivering configuration tasks and features.
Developer(s) (Required)	Writes code for the ServiceNow platform.
Trusted Service Partners (Recommended)	Attends ServiceNow Impact Accelerator coaching session(s) to understand leading practices and potentially support customer going forward.

Requested Information

Please refer to the applicable Impact Accelerator Description available athttps://www.servicenow.com/legal/servicenow-impact.html

Exceptions

This Impact Accelerator in its entirety or portions of the Impact Accelerator Activities may not be available to customers in the FedRAMP, NSC DOD IL5, or Australia IRAP-Protected data centers, to self-hosted customers, or in other restricted environments, or to managed service providers (except for their internal#use).

ServiceNow is not responsible for implementing any of the recommended configuration changes in Customer's sub-production or production instances.

Accelerator request

Depending on the Impact package that you are subscribed to, you can request and consume a designated number of concurrent Impact Accelerators.

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The process of requesting an Accelerator from IDI and Impact Store App is similar. When you request an Accelerator, you need to complete a request form and follow the on-screen guidance to complete the setup.

You can place a request for any of the available Accelerators and initiatives if you have upgraded to the latest versions of the application.

Some Accelerators require additional terms and conditions and are offered pursuant to the applicable Impact Accelerator Description. For Accelerators that require consent, the terms and conditions must be accepted from the **Manage Permissions** menu. You can manage permissions using Manage Initiative and Accelerator permissions

What to explore next

- Request an Accelerator from Request an Accelerator from IDI
- Request an Accelerator from Request Accelerators and Initiatives for Impact Store Application

Request an Accelerator from IDI

Depending on the Impact package that you are subscribed to, you can request and consume a designated number of concurrent Impact Accelerators, from the IDI.

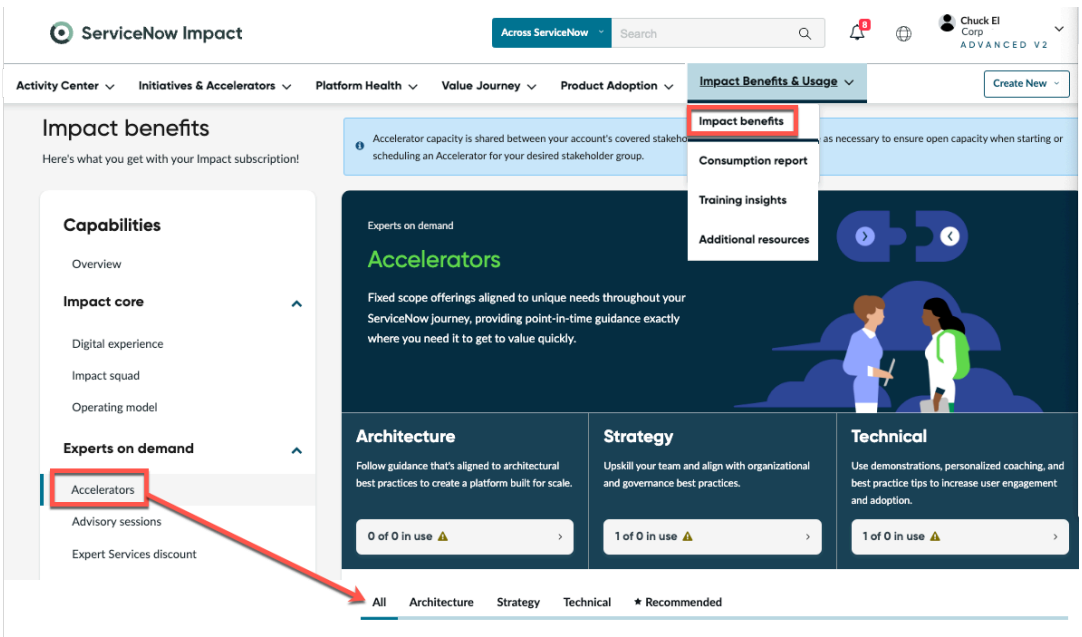
Before you begin

For details on available Accelerators, refer to the Accelerator catalog.

Role required: Impact platform owner

Procedure

1. Navigate to **Impact** > **Impact Benefits & Usage** > **Impact benefits** > **Capabilities** > > **Experts on demand** > > **Accelerators**.



2. Select **Accelerators** from the **Experts on demand** section in the left-hand **Capabilities** menu. Each Accelerator tile contains a brief description and the availability of Accelerators with individual consumption bars. Drill in for additional details on availability.
3. Select an Accelerator.
   The Accelerator details page opens.
4. Select **Get started** or **Schedule only**.

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If the available slots are filled, **Schedule only** appears to add the Accelerator to the Initiative List/Roadmap to be started later.

5. Complete the form and select **Complete Setup**.
   The Set up initiative form displays. The Accelerator in progress updates the status on the tile and displays in the Initiatives and Accelerators list.

> **Note:** An Impact Permissions Authorizer will grant or deny the request to start the initiative. See Manage Initiative and Accelerator permissions for additional information.

Request Accelerators and Initiatives for Impact Store Application

From Impact Store application, request a designated number of concurrent Impact Accelerators according to your subscription and complete the setup.

Before you begin

For details on available Accelerators, refer to the Accelerator catalog.

Role required: impact app admin, or impact platform owner, or impact portfolio owner

About this task

Both the Accelerators and the Initiatives in the Impact Store App follow a similar procedure for requesting and monitoring the progress.

Procedure

1. Navigate to **All** > **Impact** > **Accelerators & initiatives** > **Overview**.
2. Select **Request Accelerators & initiatives** from the **Your Accelerators and Initiatives Overview** page.
3. In the Accelerator Catalog, select an Accelerator card and select the maximize icon to view the details.
4. Select **Request Accelerator**.

   Schedule the Accelerator for later using the **Schedule later** button, if you have reached the maximum number of allowed concurrent Accelerators.

5. Select **View terms and conditions for this Accelerator** to understand the terms in the **Consent Provided** section.

   If you have granted consent for an Accelerator once, the terms and conditions for the Accelerator appears as accepted.

   If you have not granted consent for an Accelerator so far, you need to accept the terms and conditions from the **Manage Permissions** menu in the Impact IDE. See Manage Initiative and Accelerator permissions for more information.

   If you need time to decide, select **Revoke**. Your request doesn't move forward.

6. On the **Request form** section, fill in the fields.

Accelerator request form fields

Field	Description
Instance type to copy	Instance type such as Production or Sub-production
Instance to copy	Name of the instance in selected instance type

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Field	Description
Use ServiceNow demonstration instance	Option to use ServiceNow demo instance for the Accelerator request
Do not upgrade the temporary instance	Option to use the copied instance for the Accelerator request without upgrade
Temporary instance access	User to receive access for the temporary instance
Preferred start date	Preferred start date for the Accelerator
Assign to business objective	Business goal expected for this Accelerator
Owner	Name of the Owner for the Accelerator request
Watchlist	Names of the team members who need to know the progress of the Accelerator request
Reason for Request	Reason for the Accelerator request
Attachments	Relevant files for reference

7. Initiate the Accelerator setup by selecting **Complete Setup**.
   A dedicated Accelerator setup page displays the status of the Accelerator setup.
8. Select **Start Accelerator**.
9. Follow the progress of the Accelerator setup along with the Activity Information on the navigation panes.
   If you requested to copy an instance, the progress of the instance copy appears on the navigation pane.
10. Respond to the Impact squad by using **Notes**, **Comments**, and adding **Attachments**.
11. Select **Complete Accelerator** when all the activities listed on the navigation pane are complete.

Action	Description
Put Accelerator on Hold	Pause an Accelerator for reasons such as a pending decision or clarification. You can **Resume** the Accelerator later.
Cancel Accelerator	Stop progress of the Accelerator request if you change your decision.

If you want to complete or cancel an Accelerator before all the activities are done, all activities that are in progress get canceled. You have the choice to **Confirm** or **Cancel** your decision. You can also **Reopen** an Accelerator.
Note the status of the Accelerator changes to **Complete** or **Canceled**.

What to do next

You might want to request an initiative by following similar on-screen guidance.

If you use IDI, see Request an Accelerator from IDI to request an Accelerator.

Consumption Report

The Consumption Report provides an overview of your Impact tier features and their usage.

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The Consumption Report provides an overview of Impact features and their usage so you can identify underutilized benefits or benefits you have not yet used to make the most of your plan.

The Consumption Report filters usage to an adjustable specific period of time, and defaults to a year long range.

Note: Impact Guided customers will not be able to view the Premium role or Advisory Sessions section.

Impact Delivery Instance Consumption Report

To access the consumption report in Impact Delivery Instance, navigate to**Impact** > **Impact Benefits & Usage** > **Consumption Report**.

Report	Description
Advisory Sessions	Identify the advisory session requests and reviewing details for an advisory including name, owner,state, creation and completion dates.
Accelerators	Identify unused or underused accelerators by reviewing the status details for ongoing, completed, and not yet started accelerators and initiatives associated with your plan. View details for the accelerators including name, owner,state, creation and completion dates.
Other Initiatives	Identify unused or underused accelerators by reviewing the status details for ongoing, completed, and not yet started initiatives associated with your plan. View details for the accelerators including name, owner,state, creation and completion dates.
Additional features	Check the overview of additional features including: • Enhanced case response time • Company active case breakdown • Company learning credit balance • Users with premium access

Impact Store Application Consumption Report

To access the consumption report in Impact store application, navigate to **All** > **Impact** > **Consumption Report**, and then select the **Consumption Report** menu item in the Impact workspace.

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Accelerator and initiatives Usage	Identify unused or underused accelerators by reviewing the status details for ongoing, completed, and not yet started accelerators and initiatives associated with your plan. The In progress usage section provides an overview of the number of Architecture, Strategy, and Technical accelerators that are currently in use or remain unused.
Company Active cases breakdown	Track the number of active Now Support cases for your company by priority level ranging from P1 (Severe) to P4 (Low). Links enable you to access details for the cases in the case level groups on the Now Support portal.
Enhanced Case Response Time	Check the overview of the enhanced case response time for Impact P1 and P2 support cases for your account. The **View response time** link provides access to a case list on the Now Support portal.
Instance Observer Users	View the Instance observer seats that grant users the ability to monitor, analyze and gain insights from ServiceNow instances. View additional details about instance observer users such as username, access status, locked status, and access permissions by selecting the **View Users** link.
Developer Support Users	See who is available to assist with real-troubleshooting and get timely support for issues with your customizations by viewing detailed information on your developer support user seats. View additional details about developer support users such as username, access status, locked status, and access permissions by selecting the **View Users** link. **Note:** Impact developer support users are managed in Impact Delivery Instance. For more information, see Developer Support.

Gen AI based consumption report summarization

View a concise summary of the consumption report in the Impact store application including adoption of recommended applications, active Now Support cases with response times, and usage of developer support and instance observer seats.

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Before you begin

Configure the Now Assist consumption report summarization for Impact application to use the generative AI skills. For more information, see Activate Now Assist skills in Now Assist for Impact.

Note: Access to the AI-based consumption report summarization feature requires a Pro Plus license for any ServiceNow product.

Role required: Impact App Admin, Impact Platform Owner, Impact Portfolio Owner.

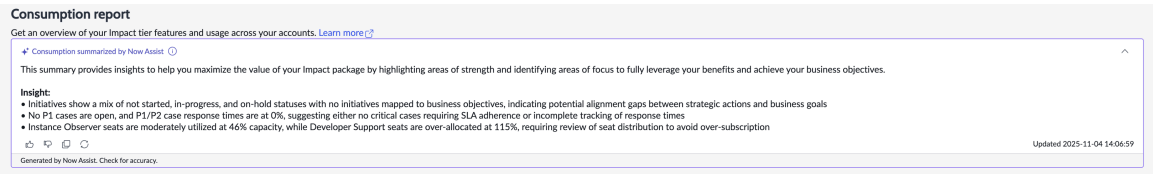
About this task

Use the Gen AI based consumption report summary to view the following:

- Details of accelerator usage and its alignment with business objectives.
- Overview of active Now Support cases, with details on response times for P1 and P2 cases and current resolution progress.
- Current usage overview for Developer Support and Instance Observer seats highlighting any over or under allocations.

Procedure

1. Navigate to **All** > **Impact** > **Consumption Report**.
2. Select **Summarize**.
   Now Assist generates and displays summary information for the outcome, as shown in the following example.



3. **Optional:** Provide feedback for the summary by selecting the thumbs-up or thumbs-down icons.
4. **Optional:** Copy the summary to use its information outside the app, for example, for including in an email or editing before forwarding, by selecting the Copy to clipboard icon.
5. **Optional:** If you think that data might have changed after you viewed the summary, refresh the summary information by selecting the redo icon.

Work items in the Impact Store Application

Create a Strategic Portfolio Management (SPM) or Collaborative Work Management (CWM) work item using recommendations and initiatives for faster execution and actionable goals.

Work items overview

Work items enable the automatic conversion of impact entities into actionable items. Using work items eliminates manual coordination across systems, reduces fragmented workflows, avoids inefficiencies, presents delays in leveraging valuable insights, and duplicate efforts.

You can use the Impact Workspace to convert impact squad recommendations, free-form recommendations, or initiatives, and product adoption roadmaps into SPM or CWM work items such as:

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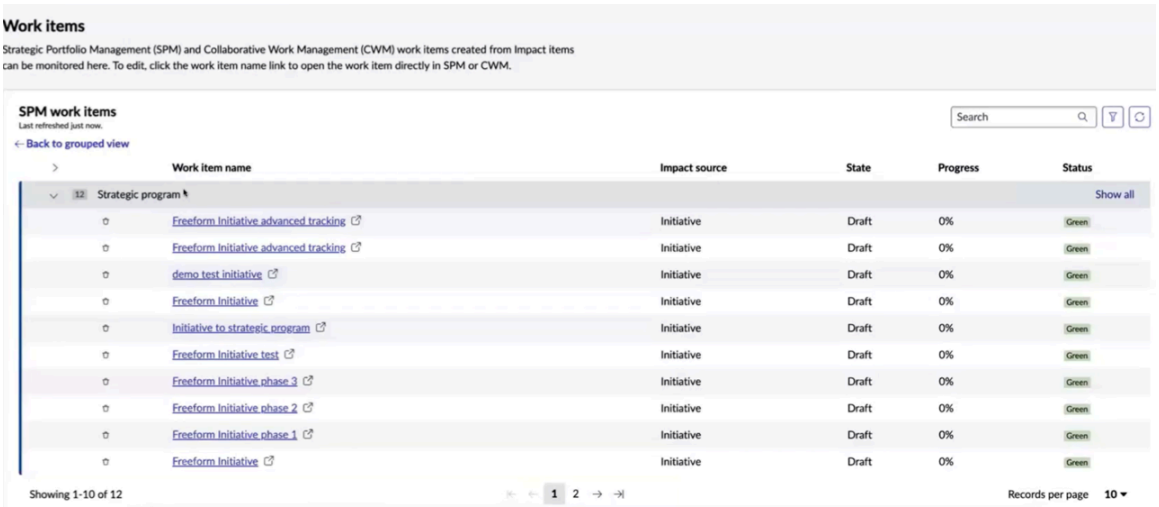
- Product Idea
- Demand
- Project
- Story
- Epic
- Feature
- Collaborative Work Management (CWM) Board

Work Items page

The Work Items page displays a centralized view of existing Strategic Portfolio Management (SPM) or Collaborative Work Management (CWM) work items along with their **Impact Source**, **State**, **Progress**, and **Status**.

You can view the grouped view of various work items grouped under SPM Work Items and CWM Work items. Select **Show All** to display an expanded view of the work items under a specific group. For instance, selecting**Show All** for **Initiatives** under **SPM Work Items** displays all the existing SPM work items created using initiatives.

Work Items view



You can search the work items on the **Work Items** page by using the search text box. You can also search for work items using filters like source, state, and status on the **Work Items** page.

Select the Filter to add a filter and choose from impact source, state, progress, or status. Then select the corresponding values. For example, to filter by **Source**, select **Source** from the filter options, and then choose one or more source types such as **Recommendation**, **Initiative**, or **Product Adoption Roadmap** from the displayed list.

Manage work items with recommendations for the Impact Store Application

Convert an Impact entity to an SPM entity either from the Impact home page or from the **Recommendations list**. Creating an Impact entity and associating the SPM record details help you to avoid manual intervention in converting the entities from Impact to SPM portals, and thereafter any duplication of entities in the process.

Before you begin

Role required: Impact App Admin, Impact Platform Owner, Impact Portfolio Owner

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You can create or convert impact entities like recommendations and free form accelerators into SPM work item based on the required role, and create and write access to at least one of the SPM tables.

Note: Impact entities can either be converted into an SPM and Collaborative Work Management (CWM) work item, or, into an SPM or CWM work item.

About this task

When you convert an Impact entity to an SPM entity, you are creating an SPM entity using some of the attributes of the Impact entity, and then associating the new SPM entity with the Impact entity.

For an Impact entity to be converted to an SPM entity, the recommendation must:

- Not be hidden by selecting the **Hide** option
- Be a rule-based recommendation
- Have been created by squad

It can be associated to a free form initiative as well.

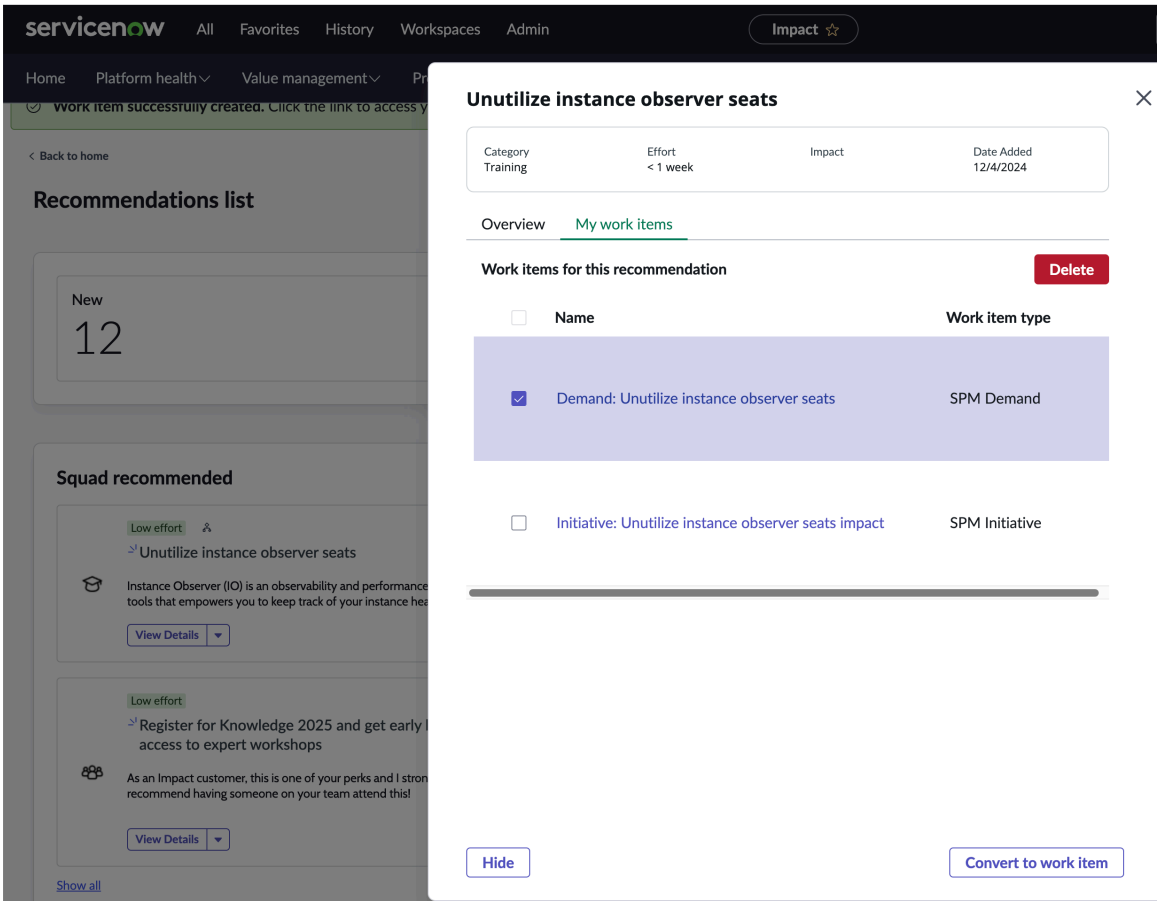
Impact entities that can be converted to SPM entities are:

- Recommendations that are created via rule engine or manually created by Impact squad user, which are not associated with any initiative or accelerator type, except for free form initiatives, can be converted into an SPM entity such as a demand, epic, project, or any other available options.
- If the status of the recommendation changes to **Rejected**, or as a user you hide the recommendation after creating the SPM entity, then you cannot view the created SPM entity list, and can no longer take any action such as create or delete the SPM entity within Impact.

Procedure

1. Navigate to **All** > **Impact** > **Home**.
2. Select the recommendation that you want to convert.
   - From the latest three listed in the **Recommended next steps** section.
   - Select **View full list** if it is not in the **Recommended next steps** section.
3. Select the **View Details** list and click **Convert to work item** option.
4. Select a work item from those that are listed for the recommendation.
   Some of the work items may be disabled. A particular impact entity can be converted to multiple SPM entities without restriction. A recommendation can also be associated with multiple strategic programs without requiring the removal of any existing associations.
5. Select **Next**.
   The corresponding SPM table or the CWM table opens in a conversion form in Strategic Planning Workspace view. The SPM record details are auto-populated in the fields, as the fields from the Impact entity are mapped to the SPM entity in the Impact SPM Definition table [sn_impact_cust_impact_spm_definition]. You can continue with the auto-filled record details or update the details if needed.
6. Select **Convert**.
   A UI message confirms that an SPM entity is created successfully with a link to the created SPM entity.
7. Select the link to view the record details, or select the recommendation and click **My work items**.
   You can view the work items that you created for this recommendation.

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In the recommendation pop-up, the **My work items** tab lists all the SPM entities like demands, projects, and others that are associated to the recommendation. If you would like to create another work item, then select **Convert to work item**.

8. To delete the work item, select the work item and click **Delete**.
   Select **Delete** in the Are you sure? pop-up. A message confirms the successful deletion of the work item.

Users who can convert an Impact entity to an SPM work item

Impact App Admin, Impact Platform Owner, Impact Portfolio Owner and Instance Admin can start the impact entity conversion to SPM work item if they have create access for the SPM entity.

Impact entities that can be converted to SPM work items

Recommendations and Free-form Initiatives can be converted to SPM work items.

Expiry of SPM license

If the SPM license expires and the user still has access to the SPM tables, then they can convert successfully. However, if their access to SPM tables is revoked then they won't be able to create a conversion and will be redirected to the home page that displays an error message.

Required SPM plugins

- Collaborative Work Management
- Portfolio Planning Core

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Manage work items from an initiative in the Impact Store Application

Use the SPM work item record link within the Impact entity to view its details, after Impact entity is successfully converted to an SPM work item.

Before you begin

Role required: Impact App Admin, Impact Platform Owner, Impact Portfolio Owner

If you do not have the Create and Write access to at least one of the SPM tables, then you can't view the list of SPM work items. As a result, you can't select and convert an Impact entity to an SPM work item.

Note: Impact entities can either be converted into an SPM and Collaborative Work Management (CWM) work item, or, into an SPM or CWM work item.

About this task

Out of the different accelerator and initiative types, only the free form initiatives can be converted into an SPM entity. The free form initiatives are created in Impact Delivery Instance, which then sync with the customer instance through service bridge.

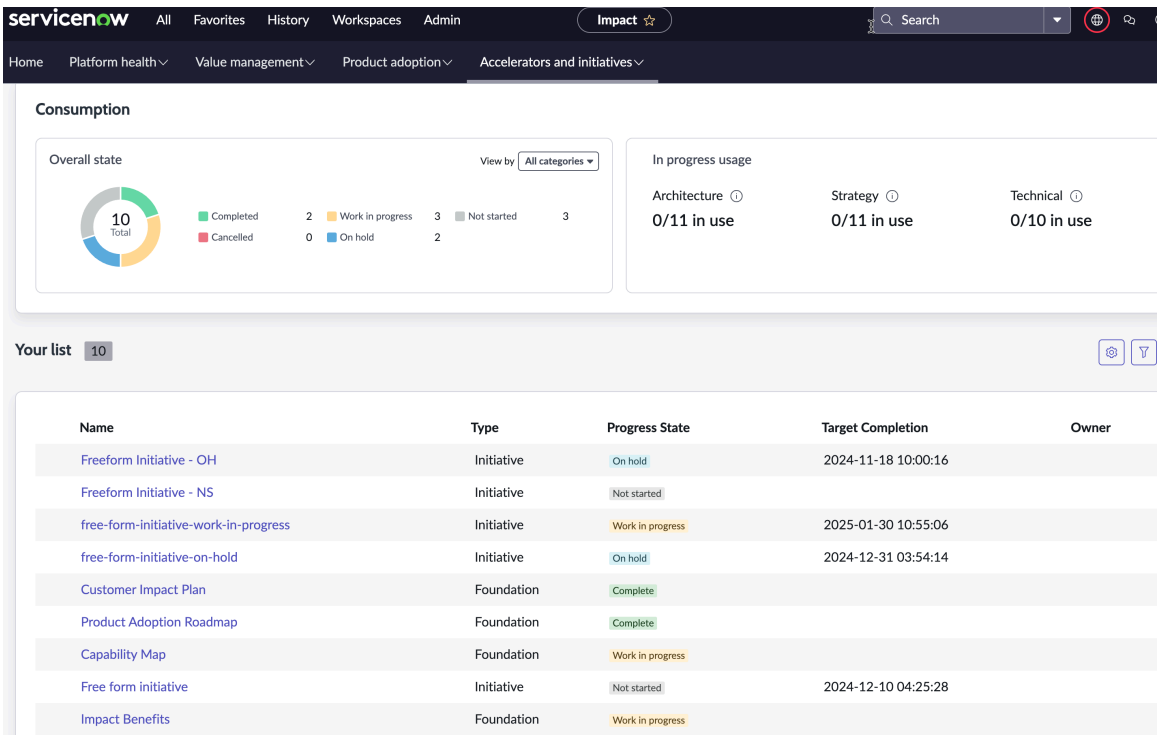
After the conversion, whenever you access the Impact entity, you can select the link to the SPM work item and view the record details in the Strategic Planning Workspace in SPM.

Impact entities that can be converted to SPM entities are:

- Free form initiatives that are not in **Closed** or **Cancelled** states can be created or converted into an SPM entity.
- The status of a free form initiative moving to **On hold**, **Cancelled**, or **Closed** state will not have any effect on an already created SPM entity, creation of a new SPM entity, or deletion of an existing SPM entity.

Procedure

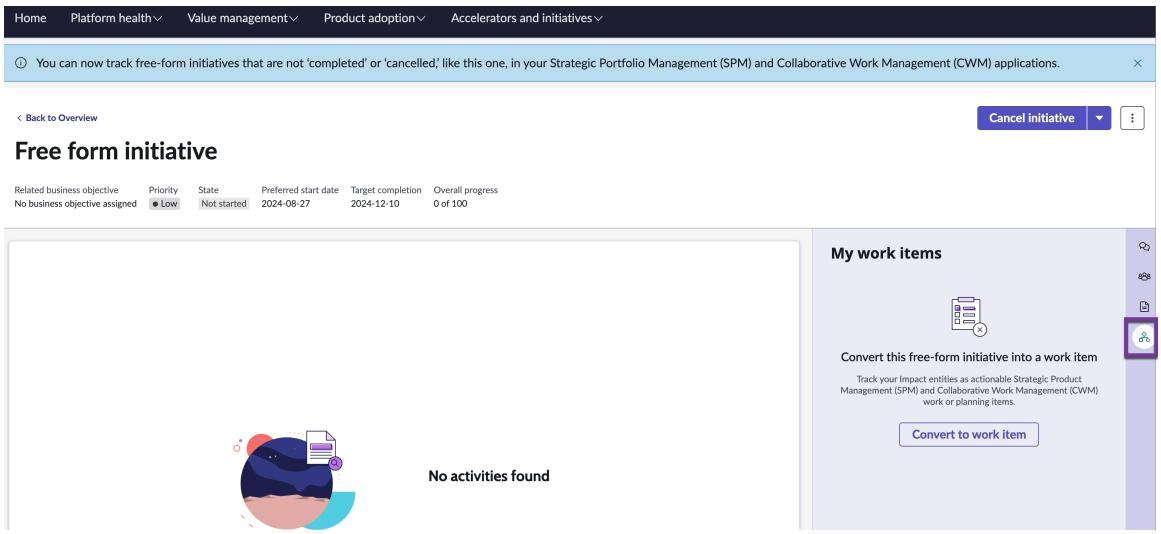
1. Navigate to **All** > **Impact** > **Accelerator and Initiatives**.



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2. Select a free form initiative that you want to convert to an SPM work item from **Your list** that is in **Not started** state.
   When you select the free form initiative, a message banner on top conveys the message that the initiative can be tracked in SPM and Collaborative Work Management applications.

3. Select the my work item ( ) icon from the right sidebar.



   Since the free form initiative is not associated with the SPM entity yet, the icon is enabled for the association. If there are existing SPM work items associated with it, then they are listed in the **My work items** pane.

4. Select **Convert to work item** to track the Impact entity as an actionable SPM and Collaborative Work Management work item.

5. Select a work item from the list.
   In the Convert Free form initiative into a work item page, you can play the **intro video** to understand the SPM feature.

6. Select any of the available options.

   a. Demand

   b. Product idea

   c. Project

   d. CWM Board

   e. Epic

   f. Strategic program

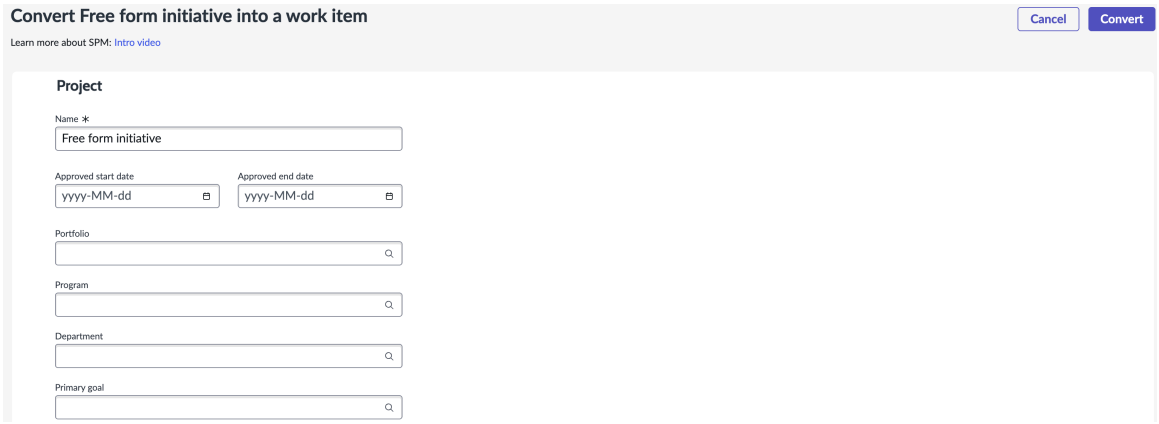
   g. Initiative

   For example, you can select a project to convert it to an SPM work item.

   Note: If you do not have the Create and Write access to any of the SPM tables, you may not be able to view any of the SPM work items. As a result you can't select and convert an Impact entity to an SPM work item.

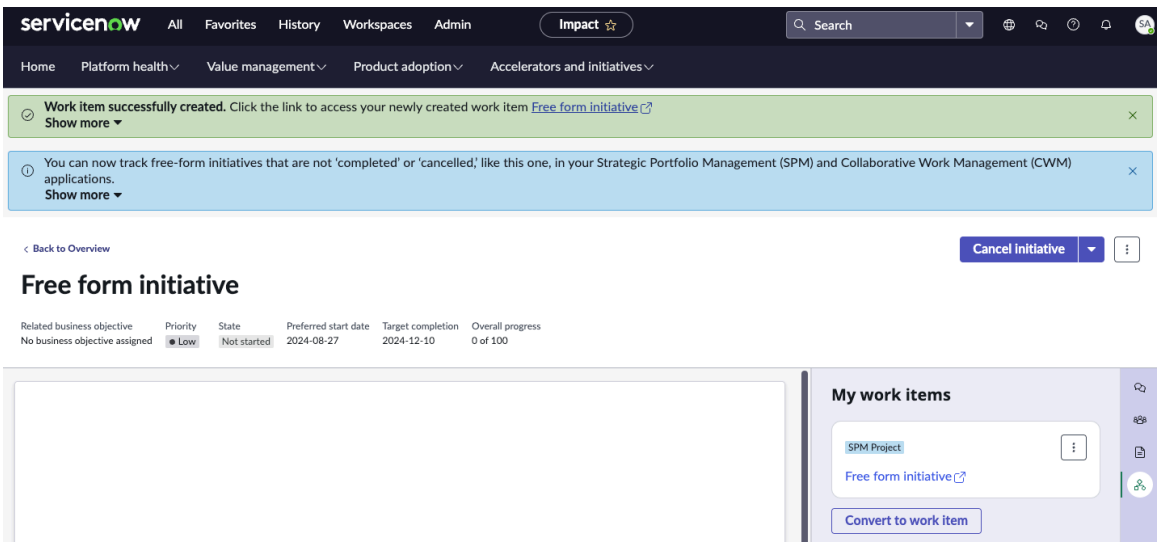
7. Select **Next**.
   The work item opens in a Strategic Planning Workspace. The record details are mapped and the free from initiative's **Name** field is mapped with the Project's name field, and hence the field is pre-populated. You can enter details in the mandatory fields, and other details if needed.

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8. Select **Convert**.
   After you convert, an SPM work item is created, and the free form initiative is associated with the SPM entity in the Impact SPM Entity Association [sn_impact_cust_impact_spm_entity_association] table. You will see a message after the operation is successful, and the link to the SPM work item is available in the Impact entity.
9. Select the free form initiative link in the message to view the SPM work item details.

   You can also select the  icon to view the details.



Manage work items from a capability linked to a Product Adoption Roadmap in the Impact Store App

Convert a capability linked to a product adoption roadmap to an SPM entity either from the Impact home page or from the **Product Adoption Roadmaps**.

Before you begin

Role required: Impact App Admin, Impact Platform Owner, Impact Portfolio Owner, Instance Admin.

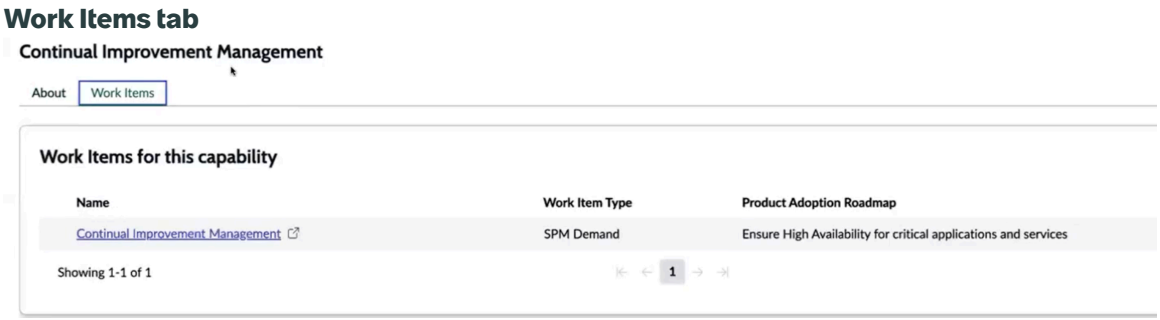
Procedure

1. Navigate to **All** > **Impact** > **Product adoption** > ..
2. On the Impact Workspace, select **Product adoption** > **Product adoption roadmaps**.
3. Select the product map that you want to convert.

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Note: You can't convert a legacy product adoption roadmap to an SPM or a CWM work item.

4. Select the more action ( ) icon for the desired capability and click **Convert to work item** option.
5. Select a work item from those that are listed for the product adoption roadmap.
6. Select **Next**.
   The corresponding SPM table or the CWM table opens in a conversion form in Strategic Planning Workspace view. The SPM record details are auto-populated in the fields, as the fields from the Impact entity are mapped to the SPM entity in the Impact SPM Definition table [sn_impact_cust_impact_spm_definition]. You can continue with the auto-filled record details or update the details if needed.
7. Select **Convert**.
   You are redirected to the **Work items** page and a UI message confirms that an SPM entity is created successfully with a link to the created SPM entity.
8. Select the link to view the record details, or open the capability from the product adoption roadmap and click **Work Items** on the capability details page.



You can view the work items that you created for this capability. A work item ( ) icon on the capability indicate that one or more work items are associated with it.

You can also access the capability from the Capability Map and navigate to the **Work Items** section to view the created items.

Users who can convert an Impact entity to an SPM work item

Impact App Admin, Impact Platform Owner, Impact Portfolio Owner and Instance Admin can start the impact entity conversion to SPM work item if they have create access for the SPM entity.

Impact entities that can be converted to SPM work items

Recommendations, Free-form Initiatives and capabilities linked to product adoption roadmap can be converted to SPM work items.

Expiry of SPM license

If the SPM license expires and the user still has access to the SPM tables, then they can convert successfully. However, if their access to SPM tables is revoked then they won't be able to create a conversion and will be redirected to the home page that displays an error message.

Required SPM and CWM plugins

- Collaborative Work Management
- Portfolio Planning Core/ Strategic Portfolio Management

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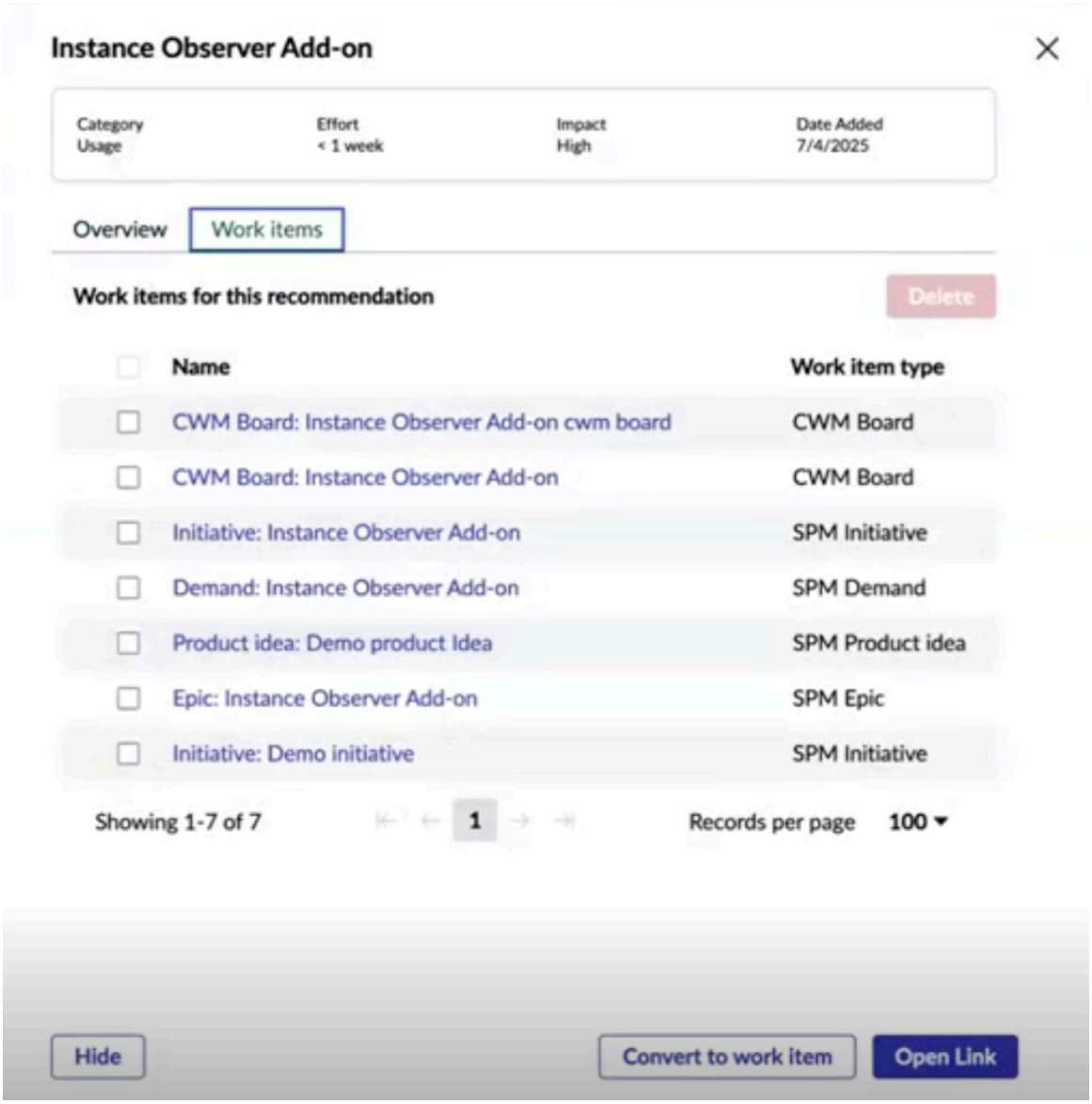
Manage Recommendation details in Impact Store

Use the recommendations details page to view the details for a recommendation and to manage the work items created using the SPM and Collaborative Work Management (CWM) recommendation.

You can access the recommendation details by selecting **View Details** for a recommendation on the home page or **Recommendations List**.

The recommendation details page displays information for a recommendation including category, effort, impact, and the date on which the recommendation was added.

You can use the **Overview** section to view detailed and relevant information regarding the recommendation for your product area.



The **Work Items** section of the recommendations page displays the actionable SPM and Collaborative Work Management (CWM) work items created for the selected recommendation. You can use the Work Items section for the following actions.

- **Delete** for deleting a selected work item.
- **Open Link** to view the selected work item on the SPM or the CWM workspace.

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- **Hide** to hide the selected recommendation.
- **Convert to work item** to create a new work item from the recommendation from the available work item types.

> **Note:** Recommendations that are created via rule engine or manually created by Impact squad user, which are not associated with any initiative or accelerator type, except for free form initiatives, can be converted into an SPM entity such as a demand, epic, project, or any other available options.

Impact reference

Several types of components are installed with activation of the Impact plugin, including tables, user roles, and scheduled jobs.

Roles installed with Impact

Impact offers many roles to assign to fit your business needs. When you log in to Impact, you'll see a personalized view of your objectives, metrics, and recommendations tied directly to your role.

There are different Impact roles for the Impact Delivery Instance and the Impact Store Application.

Impact roles and descriptions for IDI

Role	Description
Impact User	• Has general access to Impact. • Impact users can create and update conversations.
Impact Permissions Authorizer	Allows users to grant permissions for Impact features that require consent.
Impact Executive	• Has read access to view overall Impact status and value reporting. • Responsible for defining the long-term technology strategies for their organization. • Executive users can create and update conversations. • Owns the overall ServiceNow roadmap.
Impact Platform Owner	• Has full access to all Impact features. • Can request services like Accelerators and advisory sessions • Responsible for the overall accountability of the ServiceNow platform. • Provides leadership and oversight to the System Administrators.

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Impact roles and descriptions for IDI (continued)

Role	Description
	• Ensures team alignment to business strategy and the ServiceNow roadmap. • Actively involved in the overarching governance of the ServiceNow platform.
Impact Admin	• Provides user account management. (This is a key differentiator from the Impact Executive role.) • Responsible for the day-to-day administration of the ServiceNow platform. • Manages premium access, such as Instance Observer and Developer Support. • Has full access to all Impact features.

Impact User Groups and Roles

Group	Role	Description
Impact App Admin	Impact App Admin,Scan Engine Admin	• Configure the Impact application which includes configuring Scan Engine settings, schedule, and definitions, executing ALL scans, and viewing scan results. **Note:** This is a Platform Health feature. • Set up integration with the Impact IDI • #Assign roles to users and groups • Create, read, update, and delete access to all tables within Impact applications
Impact Platform Owner	Impact Platform Owner	• Create, read, update, and delete access to all tables within Impact applications • Cannot configure, setup integration or assign roles to users or groups • Request services such as accelerators • Access the Impact Platform Owner dashboard
Impact Portfolio Owner	Impact Portfolio Owner	• Create, read, update, and delete access to all tables within Impact applications • Cannot configure, setup integration or assign roles to users or groups

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Impact User Groups and Roles (continued)

Group	Role	Description
		• Request services such as Accelerators • Access the Impact Platform Owner dashboard **Note:** This group is equivalent to the Impact Platform Owner group. It is being created to provide equivalent functionality to users who are not platform owners but require the same level of access.
Impact Executive	Impact Executive	• Define the long-term technology strategies for their organization • Read access to all the Impact features • Write access to some features within Impact. • Read access to view Capabilities Maps, Product Adoption Road maps, Objectives and outcomes, Value Journey, Accelerators, and advisory sessions • Create and update conversations • Access Impact Executive Dashboard
Impact User	Impact User	• General access to Impact • Create and update conversations • Read access on all tables other than conversations
Impact Developer	Impact Developer, Scan User	• Access to the Impact Developer Dashboard • Execute on-demand scans (excluding the scheduled scan, which is handled by the Impact App Admin) **Note:** This is a Platform Health feature. • View Scan Results
Impact Development Team Lead	Impact Development Team Lead	Access to the Impact Development Team Lead dashboard

Dependent applications installed with the Impact Store App

Following is a comprehensive overview of the dependent apps that are included with the installation of the Impact Store Application Each section delineates the features that activate event-based synchronization within the various product capabilities.

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Dependent App	Description	Automatically activated once installed?	Does it move data out of your instance?	Direct / indirect dependency (is it directly tied to an Impact app feature)
@devsnc/sn-vtb	Default library of cell, row, and card components for Kanban boards.	Yes	No	Direct
Cloud Storage	Default platform capability. Captures cloud capacity usage information from both instance and account level, which is populated in the central instance to be used for apps like Subscription Management.	Yes	Yes	Indirect
Data Grid UI Component	Renders tasks in a grid layout; a necessary UI component for Strategic Portfolio Management integration.	Yes	No	Direct
Goal Framework	Core data model for SPM and CWM; a necessary component for SPM Integration.	Yes	No	Direct
Impact Common	Foundational code and data model for the Impact Store Application; baseline functionality for the Impact Store Application to work.	Yes	No	Direct
Impact Content	Content and templates that populate within the Impact Store Application (for example, Accelerator descriptions, pre-built Product Adoption Roadmap templates).	Yes	No	Direct
Impact Health	Contains Scan Engine, Real Time Validation, Analytics Dashboards, Agile Integrations, Proposed Fix for Impact Total, and Proactive Code Check functionality.	Yes	No	Direct
Impact Value Management - APM	Collects data to track value metrics; needed for Objectives and Outcomes tracking. Installed only if you have APM.	No (data collection jobs need to be enabled)	No	Direct
Impact Value Management - App Engine	Collects data to track value metrics; needed for Objectives and Outcomes	No (data collection	No	Direct

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Dependent App	Description	Automatically activated once installed?	Does it move data out of your instance?	Direct / indirect dependency (is it directly tied to an Impact app feature)
	tracking. Installed only if you have App Engine.	jobs need to be enabled)		
Impact Value Management - CSM	Collects data to track value metrics; needed for Objectives and Outcomes tracking. Installed only if you have CSM.	No (data collection jobs need to be enabled)	No	Direct
Impact Value Management - HAM	Collects data to track value metrics; needed for Objectives and Outcomes tracking. Installed only if you have HAM.	No (data collection jobs need to be enabled)	No	Direct
Impact Value Management - HR	Collects data to track value metrics; needed for Objectives and Outcomes tracking. Installed only if you have HRSD.	No (data collection jobs need to be enabled)	No	Direct
Impact Value Management - IRM	Collects data to track value metrics; needed for Objectives and Outcomes tracking. Installed only if you have IRM.	No (data collection jobs need to be enabled)	No	Direct
Impact Value Management - ITOM	Collects data to track value metrics. Needed for Objectives and Outcomes tracking. Installed only if you have ITOM	No (data collection jobs need to be enabled)	No	Direct
Impact Value Management - ITSM	Collects data to track value metrics; needed for Objectives and Outcomes tracking. Installed only if you have ITSM.	No (data collection jobs need to be enabled)	No	Direct
Impact Value Management - SAM	Collects data to track value metrics; needed for Objectives and Outcomes tracking. Installed only if you have SAM.	No (data collection jobs need to be enabled)	No	Direct
Impact Value Management - SECOPS	Collects data to track value metrics; needed for Objectives and Outcomes tracking. Installed only if you have SECOPS.	No (data collection jobs need to be enabled)	No	Direct
Impact Value Management - SPM	Collects data to track value metrics; needed for Objectives and Outcomes	No (data collection jobs need to be enabled)	No	Direct

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Dependent App	Description	Automatically activated once installed?	Does it move data out of your instance?	Direct / indirect dependency (is it directly tied to an Impact app feature)
	tracking. Installed only if you have SPM.			
Kanban board component	UI component to create Kanban boards in Impact.	Yes	No	Direct
Kanban Components	UI component to enhance Kanban board visualization in Impact.	Yes	No	Direct
Licensing Engine	Default platform capability; pulls in any entitlement data that is visualized in Impact (for example, in Capabilities Map).	Yes	Yes	Direct
MIF Customer Instance	Enables communication between customer instances; needed for summarized data visualization for Proactive Code Check dashboard.	No	Yes	Direct
Roadmap UI Builder Component	UI component for SPM; needed for SPM integration.	Yes	No	Direct
Service Bridge Base	Supporting component for Service Bridge for Consumers.	No	Yes	Indirect
Service Bridge for Consumers	Enables data sync between the customer instance and the Impact Delivery Instance.	No	Yes	Direct
Service Bridge Remote Process Sync Transport	Supporting component for Service Bridge for Consumers.	No	Yes	Indirect
SPM Common UI Component	UI component for SPM; needed for SPM integration.	Yes	No	Direct
Transporter	Supporting component for Service Bridge for Consumers.	No	Yes	Indirect

Table and field level mapping

Following is information on the data that is synchronized between the Impact Delivery Instance and the Impact Store Application.

Terms to understand:

- Source field: Field name in the Impact Delivery Instance
- Source table: Table name in the Impact Delivery Instance

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- Target field: Field name in the Customer Instance
- Target table: Table name in the Customer Instance

Value Management tables

Following are the tables that are synced with your business objectives, business outcomes, and value management metrics.

Source and target tables that are synced

Source field	Source table	Target field	T
unit	sn_impact_cust_outcome_metric	unit	x
is_custom	sn_impact_cust_outcome_metric	user_defined	x
standard_metric	sn_impact_cust_outcome_metric	metric	x
goal	sn_impact_cust_outcome_metric	outcome	x
sys_updated_by	sn_impact_cust_outcome_metric	sys_updated_by	x
sys_created_by	sn_impact_cust_outcome_metric	sys_created_by	x
name	sn_impact_cust_outcome_metric	title	x
target_percentage	sn_impact_cust_outcome_metric	goal	x
sys_created_by	sn_impact_cust_impact_outcome	sys_created_by	x
sys_updated_by	sn_impact_cust_impact_outcome	sys_updated_by	x
is_auto	sn_impact_cust_impact_outcome	isauto	x
objective	sn_impact_cust_impact_outcome	objective	x
standard_outcome	sn_impact_cust_impact_outcome	outcome	x
is_custom	sn_impact_cust_impact_outcome	user_defined	x
name	sn_impact_cust_impact_outcome	title	x
description	sn_impact_cust_impact_outcome	description	x
period_type	sn_impact_cust_outcome_performance	period_type	x
is_override	sn_impact_cust_outcome_performance	is_override	x
executive_summary_updated_on	sn_impact_cust_outcome_performance	executive_summary_updated_on	x
modified_value	sn_impact_cust_outcome_performance	value	x
automated_value	sn_impact_cust_outcome_performance	scan_value	x
sys_created_by	sn_impact_cust_outcome_performance	sys_created_by	x
outcome_metric	sn_impact_cust_outcome_performance	outcome_metric_reference	x
executive_summary_updated_by	sn_impact_cust_outcome_performance	executive_summary_updated_by	x
sys_updated_by	sn_impact_cust_outcome_performance	sys_updated_by	x
executive_summary	sn_impact_cust_outcome_performance	executive_summary	x

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Product Adoption Roadmap and Capabilities Map tables

Following are the tables that are synced with your entitled capabilities, the usage status of your capabilities, and any changes made to your Product Adoption Roadmaps.

Source and target tables that are synced

Source field	Source table	Target field
feature	sn_impact_common_capabilities_staging	feature
sys_created_by	sn_impact_common_capabilities_staging	sys_created_by
sys_updated_on	sn_impact_common_capabilities_staging	sys_updated_on
sys_updated_by	sn_impact_common_capabilities_staging	sys_updated_by
payload	sn_impact_common_capabilities_staging	payload
sys_id	sn_impact_common_capabilities_staging	sys_id
action	sn_impact_common_capabilities_staging	action
sys_mod_count	sn_impact_common_capabilities_staging	sys_mod_count
sys_created_on	sn_impact_common_capabilities_staging	sys_created_on
capability	sn_impact_common_manual_capability_description	application_id
sys_mod_count	sn_impact_common_manual_capability_description	sys_mod_count
sys_created_on	sn_impact_common_manual_capability_description	sys_created_on
manual_description	sn_impact_common_manual_capability_description	extra_description
sys_created_by	sn_impact_common_manual_capability_description	sys_created_by
sys_updated_on	sn_impact_common_manual_capability_description	sys_updated_on
sys_updated_by	sn_impact_common_manual_capability_description	sys_updated_by
sys_id	sn_impact_common_manual_capability_description	sys_id
phase	sn_impact_common_par_version_phase_app_mapping	phase
number	sn_impact_common_par_version_phase_app_mapping	number
par_version	sn_impact_common_par_version_phase_app_mapping	product_adoption_plan
order	sn_impact_common_par_version_phase_app_mapping	order
customer_application	sn_impact_common_par_version_phase_app_mapping	customer_application
customer_notes	sn_impact_common_par_version_phase_app_mapping	notes
Legacy	sn_impact_common_par_version_parent	legacy
number	sn_impact_common_par_version_parent	number
no_of_versions	sn_impact_common_par_version_parent	no_of_versions
current_published_version	sn_impact_common_par_version_parent	current_published_vers
checked_out_version	sn_impact_common_par_version_parent	checked_out_version
number	sn_impact_common_par_version_phase	number
name	sn_impact_common_par_version_phase	name
par_version	sn_impact_common_par_version_phase	product_adoption_plan

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Source and target tables that are synced (continued)

Source field	Source table	Target field
description	sn_impact_common_par_version_phase	description
order	sn_impact_common_par_version_phase	order
sys_id	sn_impact_common_par_version_app_business_obj_map	sys_id
phase_app_mapping	sn_impact_common_par_version_app_business_obj_map	phase_app_mapping
number	sn_impact_common_par_version_app_business_obj_map	number
business_objective	sn_impact_common_par_version_app_business_obj_map	business_objective
time_to_publish	sn_impact_common_par_version	time_to_publish
current	sn_impact_common_par_version	current
roadmap	sn_impact_common_par_version	roadmap
number	sn_impact_common_par_version	number
description	sn_impact_common_par_version	description
status	sn_impact_common_par_version	status
sys_updated_on	sn_impact_common_par_version	sys_updated_on
restored_from	sn_impact_common_par_version	restored_from
sys_updated_by	sn_impact_common_par_version	sys_updated_by
notes	sn_impact_common_par_version	notes
name	sn_impact_common_par_version	name
version	sn_impact_common_par_version	version
par_version	sn_impact_common_par_version_metadata	product_adoption_plar
order	sn_impact_common_par_version_metadata	order
phase	sn_impact_common_par_version_metadata	phase
number	sn_impact_common_par_version_metadata	number
customer_notes	sn_impact_common_capabilities_map	customer_notes
sys_updated_on	sn_impact_common_capabilities_map	sys_updated_on
manual_capability	sn_impact_common_capabilities_map	application
manual_usage_status	sn_impact_common_capabilities_map	revised_status
classifier	sn_impact_common_capabilities_map	notification
hidden	sn_impact_common_capabilities_map	hidden
sys_id	sn_impact_common_capabilities_map	sys_id
sys_updated_by	sn_impact_common_capabilities_map	sys_updated_by
sys_created_on	sn_impact_common_capabilities_map	sys_created_on
sys_mod_count	sn_impact_common_capabilities_map	sys_mod_count
sys_created_by	sn_impact_common_capabilities_map	sys_created_by

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Recommendations tables

Following are the tables that are synced with recommendations and information that will inform future recommendations (for example, recommendations you've used, or recommendations you've liked or disliked).

Source and target tables that are synced

Source field	Source table	Target field
recommendation	sn_impact_common_recommended_resource_likes	gam_recommenda
sys_mod_count	sn_impact_common_recommended_resource_likes	sys_mod_count
sys_tags	sn_impact_common_recommended_resource_likes	sys_tags
sys_id	sn_impact_common_recommended_resource_likes	sys_id
active	sn_impact_common_recommended_resource_likes	active
active	sn_impact_common_recommended_resource_likes	active
sys_created_on	sn_impact_common_recommended_resource_likes	sys_created_on
recommendation_type	sn_impact_common_recommended_resource_likes	recommendation_t
sys_created_by	sn_impact_common_recommended_resource_likes	sys_created_by
liked_by	sn_impact_common_recommended_resource_likes	liked_by
sys_updated_on	sn_impact_common_recommended_resource_likes	sys_updated_on
like_time	sn_impact_common_recommended_resource_likes	like_time
sys_updated_by	sn_impact_common_recommended_resource_likes	sys_updated_by
related_page	sn_impact_common_rec_info	related_page
effort	sn_impact_common_rec_info	effort
reason_trns	sn_impact_common_rec_info	reason_trns
state	sn_impact_common_rec_info	state
reject_state	sn_impact_common_rec_info	reject_state
sys_created_by	sn_impact_common_rec_info	sys_created_by
sys_id	sn_impact_common_rec_info	sys_id
sys_tags	sn_impact_common_rec_info	sys_tags
accepted_by_customer	sn_impact_common_rec_info	accepted_by_custo
overriden	sn_impact_common_rec_info	overriden
rejection_reason	sn_impact_common_rec_info	rejection_reason
published_on	sn_impact_common_rec_info	published_on
impact	sn_impact_common_rec_info	impact
rejected_by	sn_impact_common_rec_info	rejected_by
embed_text	sn_impact_common_rec_info	embed_text
sys_updated_by	sn_impact_common_rec_info	sys_updated_by
reason	sn_impact_common_rec_info	reason

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Source and target tables that are synced (continued)

Source field	Source table	Target field
additional_comments	sn_impact_common_rec_info	additional_comme
category	sn_impact_common_rec_info	category
group_recommendation_sys_id	sn_impact_common_rec_info	group_recommend
customer_action	sn_impact_common_rec_info	customer_action
link_url	sn_impact_common_rec_info	link_url
sys_mod_count	sn_impact_common_rec_info	sys_mod_count
action_record	sn_impact_common_rec_info	action_record
accepted_on_customer	sn_impact_common_rec_info	accepted_on_cust
sys_updated_on	sn_impact_common_rec_info	sys_updated_on
recommendation_source	sn_impact_common_rec_info	recommendation_s
external	sn_impact_common_rec_info	external
published_by	sn_impact_common_rec_info	published_by
name	sn_impact_common_rec_info	name
sys_created_on	sn_impact_common_rec_info	sys_created_on
related_table	sn_impact_common_rec_info	related_table
rejected_on	sn_impact_common_rec_info	rejected_on
initiative_definition	sn_impact_common_rec_info	initiative_definition
embed_url	sn_impact_common_rec_info	embed_url
name_trns	sn_impact_common_rec_info	name_trns
call_to_action	sn_impact_common_rec_info	call_to_action
dismissed_by_customer	sn_impact_common_rec_info	dismissed_by_cus
accepted_by_squad	sn_impact_common_rec_info	accepted_by_squa
related_record	sn_impact_common_rec_info	related_record
number	sn_impact_common_rec_info	number
accepted_on_squad	sn_impact_common_rec_info	accepted_on_squa
dismissed_on_customer	sn_impact_common_rec_info	dismissed_on_cus
value_potential	sn_impact_common_rec_info	value_potential
recommendation	sn_impact_common_content_recommendation_feedback	gam_recommenda
sys_mod_count	sn_impact_common_content_recommendation_feedback	sys_mod_count
dismissal_reason	sn_impact_common_content_recommendation_feedback	dismissal_reason
active	sn_impact_common_content_recommendation_feedback	active
sys_id	sn_impact_common_content_recommendation_feedback	sys_id
sys_created_on	sn_impact_common_content_recommendation_feedback	sys_created_on
sys_updated_on	sn_impact_common_content_recommendation_feedback	sys_updated_on

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Source and target tables that are synced (continued)

Source field	Source table	Target field
dismissal_id	sn_impact_common_content_recommendation_feedback	dismissal_id
sys_tags	sn_impact_common_content_recommendation_feedback	sys_tags
sys_created_by	sn_impact_common_content_recommendation_feedback	sys_created_by
active	sn_impact_common_content_recommendation_feedback	active
sys_updated_by	sn_impact_common_content_recommendation_feedback	sys_updated_by
dismissal_time	sn_impact_common_content_recommendation_feedback	dismissal_time

Accelerators tables

Following are the tables that are synced with anything related to requesting or receiving an Accelerator (requests, status, start date, target completion date, attachments, notes, etc.).

Source and target tables that are synced

Source field	Source table	Target field	Target table
due_date	sn_impact_common_impact_accelerator	due_date	x_snc_cusp_play_insta
rag_status	sn_impact_common_impact_accelerator	rag_status	x_snc_cusp_play_insta
closed_at	sn_impact_common_impact_accelerator	completed_date	x_snc_cusp_play_insta
instance	sn_impact_common_impact_accelerator	instance	x_snc_cusp_play_insta
priority	sn_impact_common_impact_accelerator	priority	x_snc_cusp_play_insta
do_not_use_instance	sn_impact_common_impact_accelerator	do_not_use_instance	x_snc_cusp_play_insta
initiative_definition	sn_impact_common_impact_accelerator	content_definition	x_snc_cusp_play_insta
state	sn_impact_common_impact_accelerator	state	x_snc_cusp_play_insta
name	sn_impact_common_impact_accelerator	name	x_snc_cusp_play_insta
rag_status_comment	sn_impact_common_impact_accelerator	rag_status_comment	x_snc_cusp_play_insta
work_start	sn_impact_common_impact_accelerator	start_date_time	x_snc_cusp_play_insta
assignment_group	sn_impact_common_impact_accelerator	assignment_group	x_snc_cusp_play_insta
owner	sn_impact_common_impact_accelerator	owner	x_snc_cusp_play_insta
active	sn_impact_common_impact_accelerator	active	x_snc_cusp_play_insta
is_exception	sn_impact_common_impact_accelerator	is_exception	x_snc_cusp_play_insta
request_notes	sn_impact_common_impact_accelerator	request_notes	x_snc_cusp_play_insta
closed_at	sn_impact_common_impact_accelerator	completed_date	x_snc_cusp_play_insta

Working with your Squad tables

Following is the information that is synced: who's on your Impact Squad, your Squad's contact information, the status of your Impact Foundations activities, and records of your consent (for example, for Accelerators that require you to accept additional terms and conditions).

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Source and target tables that are synced

Source field	Source table	Target field	Targe
name	sn_impact_common_impact_contact	name	sn_ir
idi_role	sn_impact_common_impact_contact	idi_role	sn_ir
firstname	sn_impact_common_impact_contact	firstname	sn_ir
email	sn_impact_common_impact_contact	email	sn_ir
role	sn_impact_common_impact_contact	role	sn_ir
firstname	sn_impact_common_impact_contact	firstname	sn_ir
company	sn_impact_common_impact_contact	company	sn_ir
idi_role	sn_impact_common_impact_contact	idi_role	sn_ir
lastname	sn_impact_common_impact_contact	lastname	sn_ir
is_squad	sn_impact_common_impact_contact	is_squad	sn_ir
lastname	sn_impact_common_impact_contact	lastname	sn_ir
email	sn_impact_common_impact_contact	email	sn_ir
updated_by_user	sn_impact_common_customer_consent	updated_by_user	x_sn
sys_updated_by	sn_impact_common_customer_consent	sys_updated_by	x_sn
assignment_group	sn_impact_common_impact_activity	assignment_group	x_sn
state	sn_impact_common_impact_activity	state	x_sn
comments	sn_impact_common_impact_activity	comments	x_sn
data_fields	sn_impact_common_impact_activity	data_fields	x_sn
migration_status	sn_impact_cust_impact_data_migration_status	migration_status	sn_ir
error_log	sn_impact_cust_impact_data_migration_status	error_log	sn_ir
failed_records	sn_impact_cust_impact_data_migration_status	failed_records	sn_ir
percentage_complete	sn_impact_cust_impact_data_migration_status	percentage_complete	sn_ir
migration_timestamp	sn_impact_cust_impact_data_migration_status	migration_timestamp	sn_ir
failed_sys_ids	sn_impact_cust_impact_data_migration_status	failed_sys_ids	sn_ir
table	sn_impact_cust_impact_data_migration_status	table	sn_ir
sys_created_on	sn_impact_cust_impact_data_migration_status	sys_created_on	sn_ir
migration_number	sn_impact_cust_impact_data_migration_status	migration_number	sn_ir
total_records_attempted	sn_impact_cust_impact_data_migration_status	total_records_attempted	sn_ir
feature	sn_impact_cust_impact_data_migration_status	feature	sn_ir
successful_records	sn_impact_cust_impact_data_migration_status	successful_records	sn_ir
firstname	sn_impact_common_impact_contact	firstname	sn_ir
email	sn_impact_common_impact_contact	email	sn_ir
name	sn_impact_common_impact_contact	name	sn_ir
is_squad	sn_impact_common_impact_contact	is_squad	sn_ir

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Source and target tables that are synced (continued)

Source field	Source table	Target field	Targe
lastname	sn_impact_common_impact_contact	lastname	sn_ir
sys_created_on	sn_impact_common_customer_consent	sys_created_on	x_sn
sys_created_by	sn_impact_common_customer_consent	sys_created_by	x_sn
expiration_date	sn_impact_common_customer_consent	expiration_date	x_sn
consent_state	sn_impact_common_customer_consent	consent_state	x_sn
sys_mod_count	sn_impact_common_customer_consent	sys_mod_count	x_sn
sys_updated_by	sn_impact_common_customer_consent	sys_updated_by	x_sn
sys_updated_on	sn_impact_common_customer_consent	sys_updated_on	x_sn
active	sn_impact_common_subproduction_sync	active	sn_ir
date	sn_impact_common_subproduction_sync	date	sn_ir
cost	sn_impact_common_subproduction_sync	cost	sn_ir
state	sn_impact_common_subproduction_sync	state	sn_ir
category	sn_impact_common_subproduction_sync	category	sn_ir
description	sn_impact_common_subproduction_sync	description	sn_ir
attachment	sn_impact_common_subproduction_sync	attachment	sn_ir
name	sn_impact_common_subproduction_sync	name	sn_ir
standard_objective	sn_impact_cust_impact_objective	business_objective_reference	x_sn
progress_state	sn_impact_cust_impact_objective	progress_state	x_sn
sys_created_by	sn_impact_cust_impact_objective	sys_created_by	x_sn
objective_color	sn_impact_cust_impact_objective	objective_color	x_sn
objective_status	sn_impact_cust_impact_objective	overall_status	x_sn
description	sn_impact_cust_impact_objective	description	x_sn
is_custom	sn_impact_cust_impact_objective	user_defined	x_sn
end_date	sn_impact_cust_impact_objective	targeted_completion_date	x_sn
sys_updated_by	sn_impact_cust_impact_objective	sys_updated_by	x_sn
start_date	sn_impact_cust_impact_objective	start_date	x_sn
name	sn_impact_cust_impact_objective	title	x_sn

Secure data transfer using Service Bridge

Data transfer between the Impact Delivery Instance and Impact Store Application is facilitated via Service Bridge.

Service Bridge is a core technology that enables secure integration and real-time data synchronization, maintaining consistency across both instances. The framework primarily handles outbound and inbound payloads using the sendPayload() method for data transmission. sendPayload is a Service Bridge function that enables JSON data transfer to the transport queue. It is used internally and configured by the ServiceNow team to package and send data between

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the Impact Delivery Instance (IDI) and Impact Store Application. Tables are mapped between the two instances, and custom logic is applied for specific data synchronization needs.

For information on configuring the data transfer between the Impact Store Application and the Impact Delivery Instance see Configure the Impact Store Application.

For more information on Service Bridge, see Service Exchange.

For more information on Impact table mapping, see Table and field level mapping and Dependent applications installed with the Impact Store App.

Use manual registration to configure the Impact Store Application

Manual registration is generally used by advanced users or to obtain configuration support from your Impact Squad. Regulated and GCC customers are also required to use manual registration.

Before you begin
Refer to Configure the Impact Store Application for prerequisite configuration steps.

Important:

Follow the individual topics for each step of the Impact Guided setup. Manual registration is performed in place of the automated registration step 8, Use automated registration to connect to the Impact Delivery Instance.

If the automated registration failed, contact your Impact Squad, as the manual configuration may also fail to complete successfully.

1. Install the Impact Store Application from the ServiceNow Store

   Follow these instructions to install the Impact Store Application.

2. Use Guided Setup for Impact Store Application configuration

   Use Impact Guided Setup to follow a sequence of tasks that help you configure the Impact Store Application on your ServiceNow instance.

3. Use Guided Setup to onboard users to the Impact Store Application

   Onboard new and existing users to the Impact Store Application.

4. Assign users to Scan Engine groups

   In addition to assigning Impact users to groups, the Platform Health users must also be part of a group.

5. Activate Scan Engine and review settings

   Use Impact Guided Setup to set up the minimum required configuration options in order to run the first system scan.

6. Run your first scan with the Scan Engine

   An initial full Scan Engine completion is required to set a baseline from a series of tasks performed that tune the instance environment to complete future scans quickly and efficiently.

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7. Run the Service Bridge pre-configuration scan

   Track errors on recent transactions, see connection status, run health checks, and receive recommendations to improve the health of your Impact instance for connection with Service Exchange.

Impact

Role required: admin, any Impact role

Procedure

1. Complete steps 1-7 of the Impact Guided setup, as mentioned in the **Before you begin** section.
2. Complete the manual connection steps:
   a. Initiate the connection to the Impact Delivery Instance with manual registration.
   b. Use manual registration to establish the connection to the provider instance with Service Bridge registration
3. Return to Guided Setup to Verify Impact data connection
4. Initiate data migration from IDI that migrates data from IDI to the Impact Store Application.

Initiate the connection to the Impact Delivery Instance with manual registration

Establish a connection between your Impact Store Application and the Impact Delivery Instance to allow the exchange of data.

Before you begin

Important: A named contact administrator must be allocated to perform the installation and implementation of the Impact Store Application. The person initiating registration may not be the named contact administrator.

- The named contact administrator must have an Impact role for both the Impact Store Application and the Impact Delivery Instance to configure the integration of data.
- The named contact administrator performs the configuration starting with a registration email sent from the Impact Squad.
- The registration email contains a direct link to the IDI provider connection form.

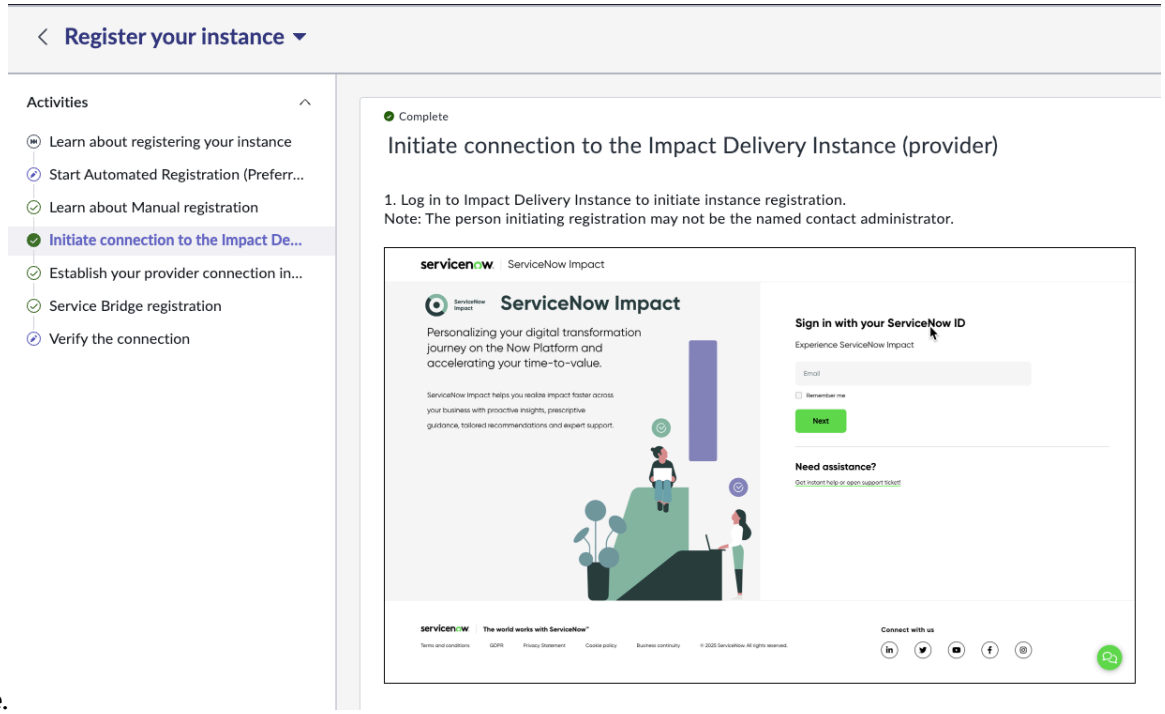
Role required: An Impact role

Procedure

1. Install the Impact Store Application from the ServiceNow Store.
2. Log in to the Impact Store Application.

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3. Navigate to **Guided Setup** > **Register your instance** > **Initiate connection to the Impact Delivery Instance**.



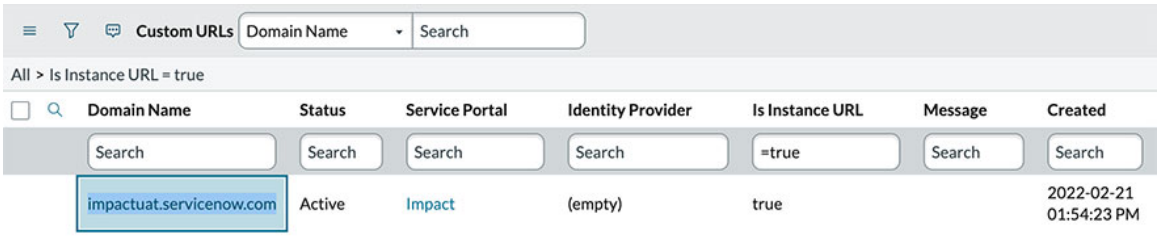
The login screen for IDI displays to enter IDI credentials.

4. Log in to the Impact Delivery Instance.
5. Navigate to **Activity Center** > **Instance registration**.
   The Instance registration page loads.
6. Select **Add instance**.
   The Initiate instance registration form loads.
7. Complete the form.

Field	Description
Instance type	Production or non-production
Instance to register	Name of the instance to be registered
Do you have a custom URL?	Custom or vanity URL to the Store App ○ No: The URL Impact Store Application auto-populates. ○ Yes: ▪ Navigate to the Impact Store App **All** > **Custom URLs**. ▪ Copy the value from the **Domain Name** column. ▪ Paste the Domain name into the Custom URL field. **Note:** See the following image for an example. Contact your Impact Squad for assistance.

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Field	Description
Contact (administrator who receives the email to complete setup)	○ Named contact administrator that is allocated to perform the installation and implementation of the Impact Store Application. ○ Must have Impact roles for both IDI and the Impact Store App



8. Select **Initiate registration**.
   The registration information is displayed along with the generated registration link. The details are also emailed to the named contact administrator.

What to do next

The named contact administrator will Use manual registration to establish the connection to the provider instance.

Use manual registration to establish the connection to the provider instance

The named contact administrator will establish a secure connection to the Impact Delivery Instance (provider instance) using Now Service Exchange to transmit data with the Impact Store Application.

Before you begin

- Confirm the Impact Store Application is installed and the connection to the Impact Delivery Instance has been initiated. See Initiate the connection to the Impact Delivery Instance with manual registration for details.
- A registration email with a direct link to the IDI provider connection form is sent to the named contact administrator in order during the initial connection to IDI.

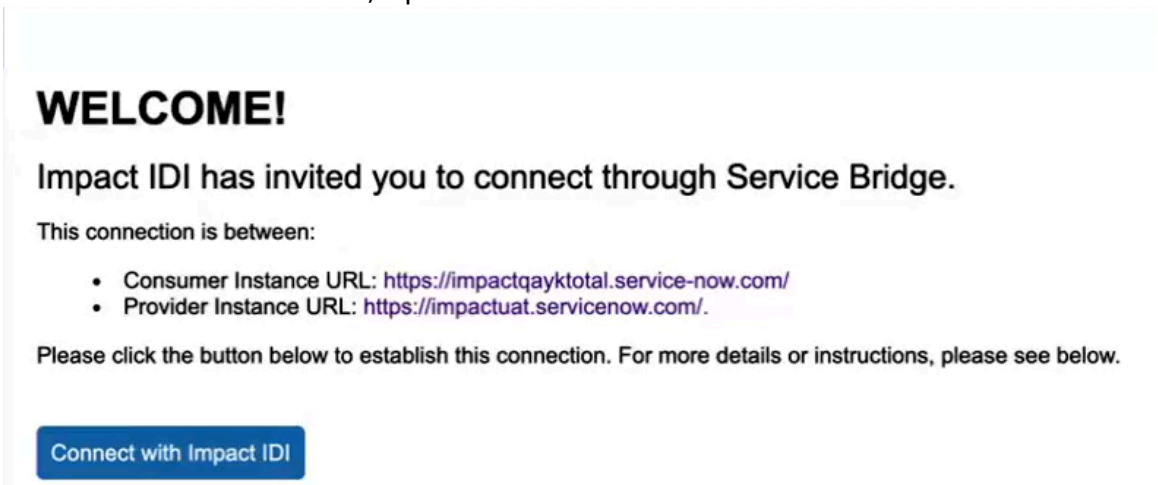
For more information on Service Bridge, see Secure data transfer using Service Bridge.

Role required: Any Impact Store App role, IDI admin

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Procedure

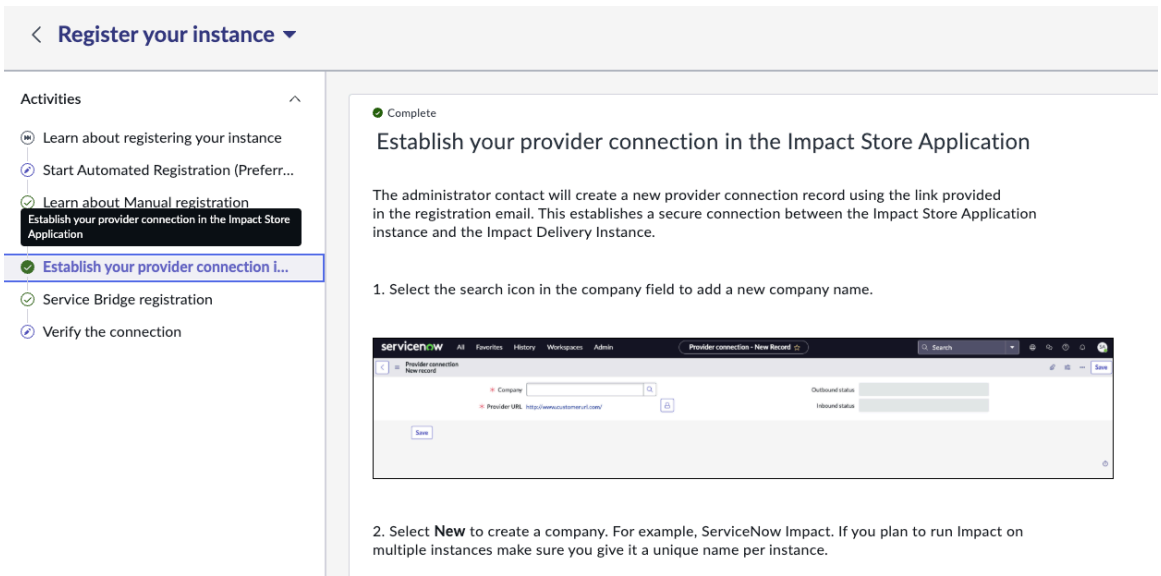
1. As the named contact administrator, Open the **Welcome**



email.

Note: If you didn't receive the registration email, reach out to your Impact Squad.

2. Select **Connect with Impact IDI** in the registration email to go to the Provider connection form to initiate the connection between the Impact Store Application and the Impact Delivery Instance.
Detailed screens are available in the Impact Store Application manual registration steps.



3. Complete the form as described in the Provider connection fields table.

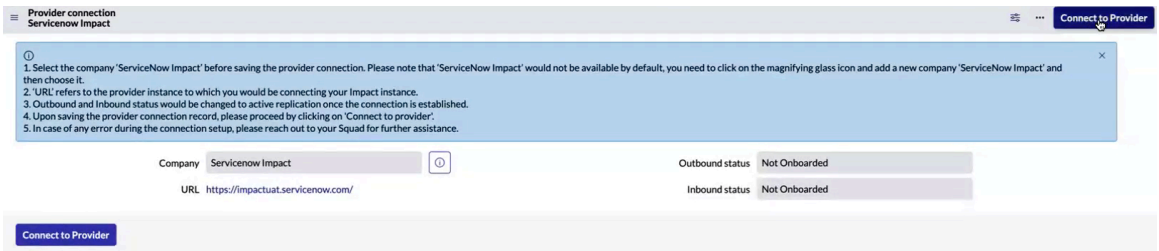
Provider connection fields

Field	Description
Company	○ Select Impact in the company field. If not listed, add a new company. Only the company name is required to **Submit**. ○ A new ServiceNow company is required for each instance being configured.

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Field	Description
URL	The URL to your Impact Store Application IDI provider instance that is pre-populated when accessing from the registration email. Use a unique company name for each Impact instance.
Outbound status	Read-only status of the connection of your Impact Store Application communicating to the IDI. ○ Not Onboarded: Onboarding and data have not yet been connected to synchronize with the Impact Store Application. ○ Active Replication: Onboarding and data have been successfully connected to retrieve data from IDI to the Impact Store Application. ○ Closed Complete: Onboarding and synchronization is successful.
Inbound status	Read-only status of the connection of your Impact Store App receiving data from the IDI. ○ Not Onboarded: Onboarding and data has not yet imported from IDI to the Impact Store Application. ○ Active Replication: Onboarding and data have been successfully imported from IDI to the Impact Store App. ○ Closed Complete: Onboarding and synchronization are successful.

4. Select **Save** on the Provider Connection New Record form.
The Provider connection form will be populated.



5. Select **Connect to Provider**.

> **Note:** In the option menu for the Provider connection New record, verify that View > Impact is selected. This option is only available in the Impact view for the Provider connection.

You're redirected to IDI to authenticate the registration.

6. Log in to IDI, if not already logged in.

The IDI admin role is required to access the registration options.

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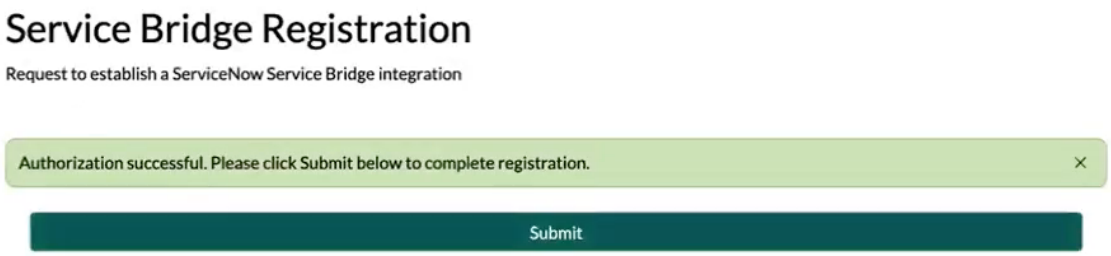


7. Select **Authenticate** to authorize the registration process.



You're redirected back to the Impact Store Application where a verification message displays to accept the authentication request.

8. Select **Allow** to confirm the connection between the Impact Store Application and the IDI. An authorization success message displays in the Service Exchange registration

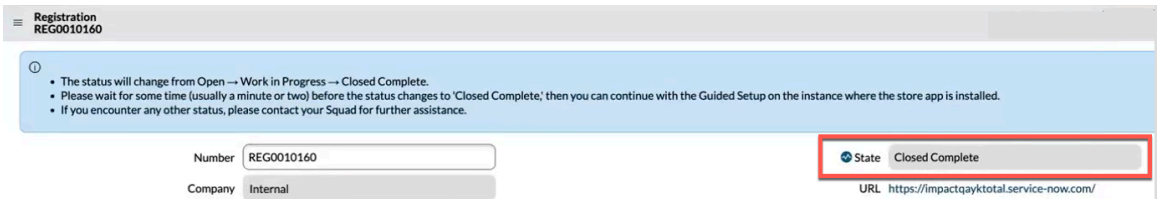


page.

9. Select **Submit** to complete the registration.

> **Note:** For information on troubleshooting with Service Bridge, see https://support.servicenow.com/kb?id=kb_article_view&sysparm_article=KB1571549.

The registration page loads for the authorization. When the state updates to Closed Complete, the authorization is successful and you may continue with the remaining Guided Setup tasks.



> **Note:** The authorization and state may take several moments to update.

What to do next

- Verify Impact data connection
- Initiate data migration from IDI
- Grant temporary instance access to your Impact Squad

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Domain Separation in Impact

Domain separation is unsupported for Impact. 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: No support

- The domain field may exist on data tables but there is no business logic to manage the data.
- This level is not considered domain-separated.

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

Additional resources for Impact

If you're looking for Impact leading practices, troubleshooting, or other informational guidelines, select a feature or resource type to discover additional ServiceNow resources.

Note: Many resources in this table require you to log in to sites like ServiceNow ServiceNow University, Now Create, or the ServiceNow Community. If the expected resource does not load, please log in and try to access the resource again.

Impact resource links

Feature	Resource type	Resources
ServiceNow Impact	Getting started	• Impact Community • Impact introduction
Impact Scan Engine	Getting started	Scan Engine Community
ServiceNow Community	General	ServiceNow Community
Impact Store Application	Getting started	How to get started with Impact
Platform Health	Getting started	Platform Health: Community
Applicable Impact Descriptions	Terms and Conditions	Impact legal
Access Control List Rules	Documentation	Security and access control
Service Exchange	Documentation	Service Bridge
Instance Observer	Getting Started	• Community: What is Instance Observer? • Impact Academy

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