servicenow®

Washington DC Application Portfolio Management

Last updated: 12/16/2025

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

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Application Portfolio Management

Use the ServiceNow® Application Portfolio Management (APM) application to gain a comprehensive understanding of the applications used in your organization so you can identify redundancies, and decrease budgetary costs. By consolidating applications within the same business function, you can identify applications to modernize or upgrade.

Watch this five-minute video to get a better overview of Application Portfolio Management.

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

You can address business challenges such as:

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- Inadequate performance because of outdated applications.

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

Manage digital Integrations in APM

Manage all the integrations of all your applications at a centralized space to control them in Application Portfolio Management.

Rationalize applications by business capability

Rationalize all the business applications in a specific business capability and decide whether to invest, sustain, or to replace any application by configuring multiple combinations of indicators in a bubble chart.

Define standards for software products and products versions

Define software products standards and manage unapproved software in your organization. Use the Technology Reference Model feature to define the standards for the software to be used in your organization.

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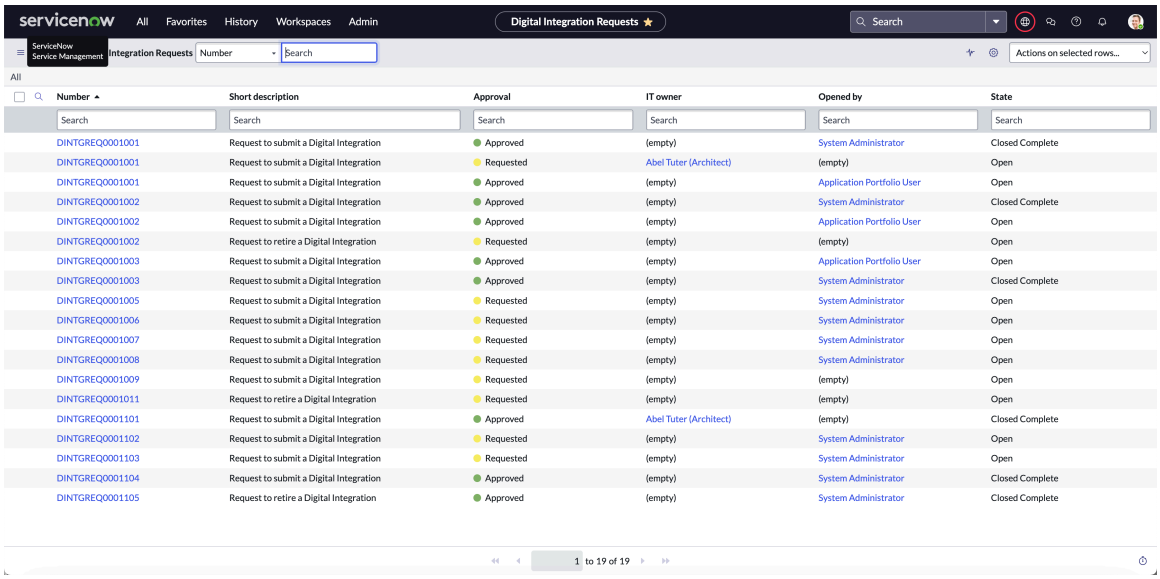
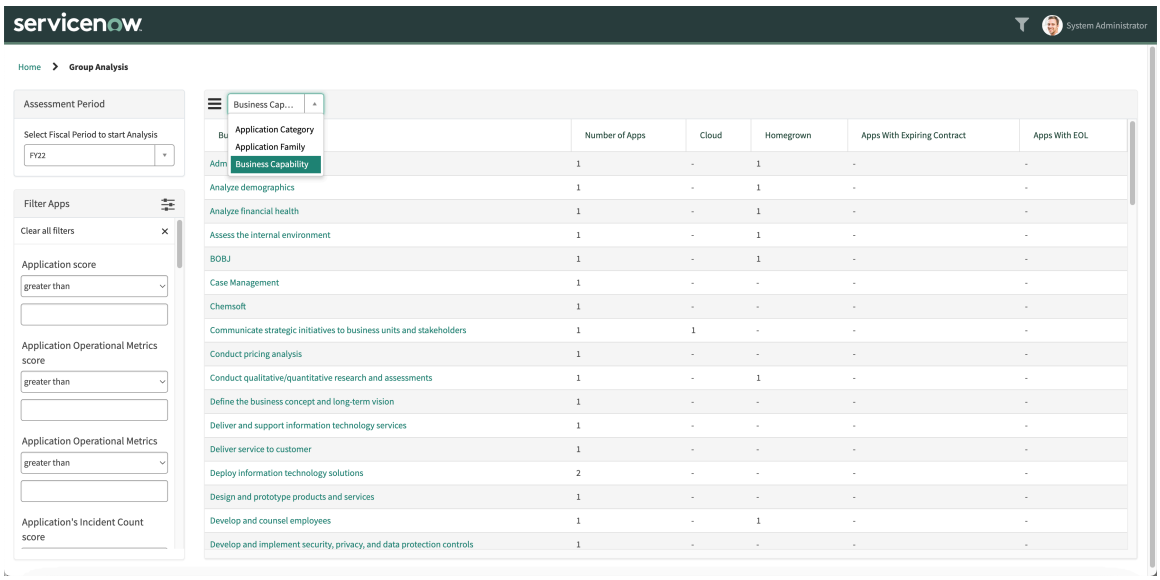
Manage digital Integrations in APM



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

Rationalize applications by business capability



Evaluate business application scores in the context of business capability. Decide whether to invest, sustain, or to replace an application by configuring multiple combinations of indicators in the bubble chart.

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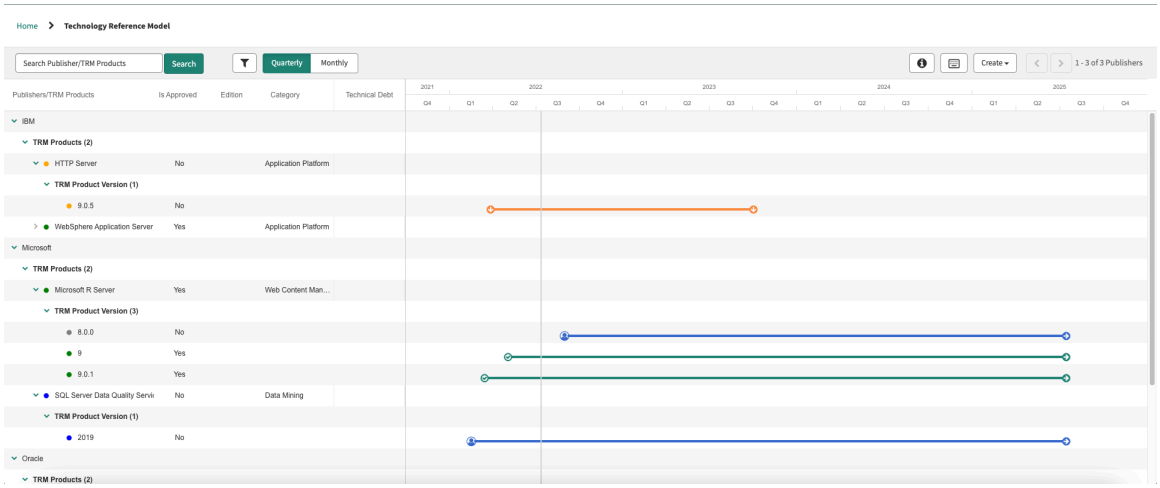
Define standards for software products and products versions



Use the Technology Reference Model (TRM) module to define standards for all software applications that are used in your organization. You can define the software, and software versions to be used in the production. Add new software products to the TRM library, and approve or reject requests submitted by other stakeholders. Use the technical debts page to find out unapproved software products that are being used in production.

Applications and features

- Enterprise Architecture Workspace
- Application Portfolio Management Overview
- Application Portfolio Management portal
- Technology Portfolio Management
- Technology Reference Model
- Management of digital integrations
- Application Portfolio Management (APM) Cloud Assessment
- Architectural artifacts
- Exporting Application Portfolio Management data to Microsoft PowerPoint

Application Portfolio Management

Application Portfolio Management (APM) provides a complete picture of the application estate, including the underlying technology relationships.

This video explains the features and benefits of Application Portfolio Management.

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

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

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APM provides both the technology and work perspective that helps architects to easily assess the impact of any changes on the architectural state. APM also ensures what is being planned is aligned with the technology and the strategic goals of the organization.

Get started

Explore Learn the key features and business value that APM offers	Configure Configure APM	Integrate Integrate APM with other products
Use Learn how to use APM	Reference Get details about components, form fields, and general guidelines of APM	

Troubleshoot and get help

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

Exploring Application Portfolio Management

Learn about the features, functionality, and the business value that Application Portfolio Management provides.

APM uses the following key solution components:

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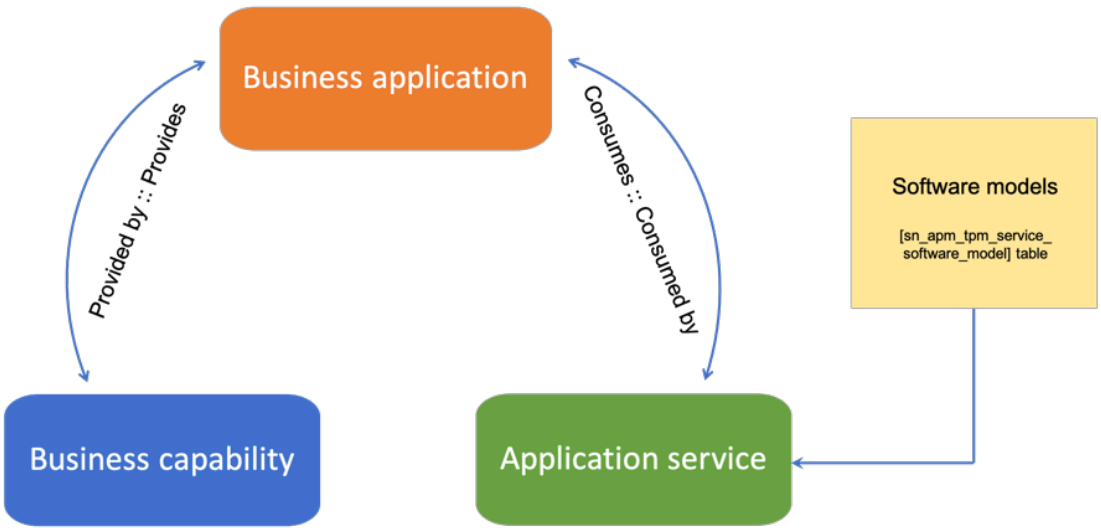
- Application Classification
  - Focuses on Enterprise Business Applications, which can also include functional modules part of a larger ERP suite.
  - Provides additional attributes to classify applications in a new CI class, Business application, which extends the base Configuration Management Database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

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

APM CI relationship



  - Captures phased rollout/deployment of applications by business unit or geography.
  - Captures attributes from the referenced Software Model.
- Applications Assessment Framework
  - Indicators to assess the application across dimension such as cost, quality, risk, user satisfaction, and business alignment.
  - Common indicators from ServiceNow applications like Financial Management for costs, ITSM for support issues, PPM for investment details.
- Reports and Dashboards
  - Application Landscape Dashboard
  - Application 360 Dashboard
  - Application Assessment Dashboard
  - Application Strategy Recommendation (bubble chart)
  - Applications Rationalization Roadmap
  - Application Risk and Compliance Overview (role required is sn_grc.reader)
- Integration with other applications
  - Integrates with Project Portfolio Suite (PPS) to track execution of strategic goals and recommendations.
  - Integrates with Financial Management to assess applications costs and associated breakdowns.

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- Integrates with PPS to assess planned investments for applications.
- Integrates with ITSM to assess the incidents, problems, and changes for the applications.
- Integrates with Service Administration to generate an assessment questionnaire to a user or user group who use the business application and can assess its performance.
- Integrates with Agile Development 2.0 Digital Portfolio Management (DPM) so that the DPM managers gain a comprehensive understanding of business applications that helps in taking informed decisions to invest, sustain, or replace them. DPM provides a unified workspace for owners to view and collectively manage their services and applications through the full life cycle. For more information, see Exploring Digital Portfolio Management.

Installed with Application Portfolio Management

Several types of components are installed with Application Portfolio Management.

Tables installed with Application Portfolio Management

Tables are added with activation of Application Portfolio Management.

Table	Description
Application Bubble Chart [apm_bubble_chart]	Bubble chart configuration.
Application Service Risk [sn_apm_tpm_business_service_risk]	Stores risks on an application service for TPM.
Application Category [apm_application_category]	Application category to which the business application belongs to.
Application Category Group [apm_application_category_group]	Group of application categories.
Application Family [apm_application_family]	All application families.
Indicator [apm_metric]	Indicator definition to capture the indicator scores.
Indicator Score [apm_app_indicator_score]	Indicator scores calculated by the engine based on the profile.
Scoring Profile [apm_application_profile]	Scoring profile definition.
Profile Indicator [apm_application_profile_indicator]	Application profile indicator with a weightage numbers to calculate the overall score of a business application.
CI Score [apm_app_score]	Overall application score calculated by the engine based on the application profile.
Business Application [cmdb_ci_business_app]	All business applications.
Application Service Software Model [sn_apm_tpm_service_software_model]	Stores the software models (technologies) underlying each application service.
Goal Contribution Target [goal_contribution_target]	Goal contribution of a program for the target fiscal year.
Demand Action [apm_idea_action]	Actions available for submitting a demand.
Risk Parameter [sn_apm_tpm_risk_parameter]	Stores the risk parameters in TPM.
Risk Parameter Score [sn_apm_tpm_risk_param_score]	Stores the risk parameter scores for each software model in TPM.

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Table	Description
	For example, if there are four parameters, then for each software model there are four records stored in the table.
Software Model Risk [sn_apm_tpm_software_model_risk]	Stores risks on the software models in TPM.
Hardware Model Risk [sn_apm_tpm_hardware_model_risk]	Stores risks on the hardware models in TPM.
TRM Product Lifecycle Request [sn_apm_trm_product_lifecycle_request]	Request for a TRM product lifecycle.
TRM Product Request [sn_apm_trm_product_request]	Request for a TRM product.
TRM Category [sn_apm_trm_standards_category]	TRM category.
TRM Phase [sn_apm_trm_standards_phase]	TRM phase.
TRM Product [sn_apm_trm_standards_product]	TRM Product.
TRM Product Lifecycle [sn_apm_trm_standards_product_lifecycle]	TRM Product Lifecycle.
TRM Technical debt [sn_apm_trm_standards_technical_debt]	Technical debts information for TRM products.
Architectural Artifact [sn_apm_architectural_artifact]	Name of an Architectural Artifact.
Architectural Artifact Version [sn_apm_architectural_version]	Version of an Architectural Artifact.
Architectural Category [sn_apm_architectural_category]	Category of an Architectural Artifact.
Related Entities [sn_apm_related_entities]	Related entities for Architectural Artifacts.
New Table [sn_apm_ppt_status_report]	APM PowerPoint Status Report Table.
Data Classifications [cmdb_data_classification]	List of data classifications for information objects.
Data Classification Groups [cmdb_data_classification_group]	List of data classification groups for information objects.
Data Classification Mapping [cmdb_data_classification_mapping]	Mapping details of the data classification with an information object.

Roles installed with Application Portfolio Management

Roles are added with activation of Application Portfolio Management.

Role	Description	Contains roles
sn_apm.apm_read	Access to view APM dashboards provided by the base system and the	Includes pa_viewer and cmdb_read roles.

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Role	Description	Contains roles
	underlying tables from where the data for the dashboards are retrieved.	**Note:** Activate the Notify (com.snc.notify) plugin to include the notify_view role. View Application 360 dashboard, Application Landscape dashboard, Application Assessments dashboard.
sn_apm.apm_user	Access to update applications, view landscape, and roadmap.	Includes pa_viewer, and certification roles. **Note:** • Activate the Notify (com.snc.notify) plugin to include the notify_view role. • Activate PPM Standard (com.snc.financial_planning_pmo) plugin to create project/program in CBP and TPM. For information on PPM roles, see Plugins installed with PPM Standard (Project Portfolio Management) . • View/update applications. • Request to create business applications. • View application landscape reports and dashboards. • View applications roadmap. • View Application 360 dashboard.
sn_apm.apm_admin	Create or update application records and access administration activities.	Includes sn_apm.apm_user, assessment_admin, certification_admin roles.

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Role	Description	Contains roles
		• Create/update/delete application categories. • Create/update/delete application families. • Create/update/delete business processes. • Create/update/delete application indicators. • Create/update/delete application score profile. • Create/update/delete bubble charts. • View application indicator scores and application scores. • View application assessment dashboard. • View Application 360 dashboard.
sn_apm.apm_analyst	Create applications and access landscape and dashboards.	Includes sn_apm.apm_admin and treemap_user roles. **Note:** Activate PPM Standard (com.snc.financial_planning_pmo) plugin to create project/program in Capability-Based Planning (CBP) and Technology Portfolio Management (TPM). For information on PPM roles, see Plugins installed with PPM Standard (Project Portfolio Management). • Create/update/delete applications. • Create/update/delete application indicator scores. • Create/update/delete application scores. • Create/update/delete APM programs and targets. • Create/update/delete goals.

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Role	Description	Contains roles
		• Access the APM Service Portal pages for program navigation, category analysis, bubble chart view, application comparisons. • Create demand with application strategy related attributes. • View Application 360 dashboard.

UI policies installed with Application Portfolio Management

UI policies are added with activation of Application Portfolio Management.

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

Scheduled jobs installed with Application Portfolio Management

Scheduled jobs are added with activation of Application Portfolio Management.

Scheduled job	Description
Business Application Certification On Demand	Schedules a certification task and the certification schedule is run on demand.
Business Application Certification Quarterly	Schedules a certification task and the certification schedule is run periodically every quarter.

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Scheduled job	Description
Business Applications not related to any Business Capability audit	Checks the CI relationship [cmdb_rel_ci] table for business applications that are not related to any business capability.
Business Applications not related to any Software Model	Checks the CI relationship [cmdb_rel_ci] table for business applications that are not related to any software model.
Business Applications related to multiple Business Capabilities in the same hierarchy	Checks the CI relationship [cmdb_rel_ci] table for a possibility where the same business application is tied to multiple business capabilities at the same level of the hierarchy.
Load Application Indicators and compute Application Scores	Populates application indicator score and calculates application scores based on the scoring profile attached to the business application.
Load TPM Risk Parameters and compute Application Service Risks	Calculates the software model risk and the business application risk.
Orphaned Business Capabilities	Checks for capabilities that have neither parent capability nor child capabilities, and do not have any business applications related to it.
Software Products with no lifecycle data (for product models that are used by the business applications)	Retrieves software model records used by the business applications and then checks if life-cycle data is present for the products related to these software models.
Update Business Capability Levels and Hierarchy IDs	Updates the order and hierarchy of the business capabilities in the Capability map.
Populate TRM Technical debt for production applications	Populates data in the TRM technical debts table.

Client scripts installed with Application Portfolio Management

Client scripts are added with activation of Application Portfolio Management.

Client script	Table	Description
Mark **Goal** mandatory with respect to APM view	Program [pm_program]	Marks **Goal** mandatory with respect to APM view.
Defaulting comments for scripted indicator	Application Indicator [apm_metric]	If the **Data Source** field is Custom script, then the **Custom script** field is populated with the sample custom script.
Populate CI manufacturer for applications	Business Application [cmdb_ci_business_app]	Populates manufacturer for business application.
Set view in APM to true	Program [pm_program]	Sets the **Used by APM** check box to true.
Set mandatory attributes for APM goals	Goal [goal]	Sets mandatory attributes for APM goals.

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Client script	Table	Description
Restrict Sustain	Demand Action [apm_idea_action]	Restricts sustain from the list of strategies.

Business rules installed with Application Portfolio Management

Business rules are added with activation of Application Portfolio Management.

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

Application Portfolio Management portal

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

Watch this five-minute video to get a better overview of Application Portfolio Management.

You can navigate to the Application Portfolio Management portal page by clicking **Application Portfolio Management** > **Home**. The role required is sn_apm.apm_analyst.

Important:

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

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

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

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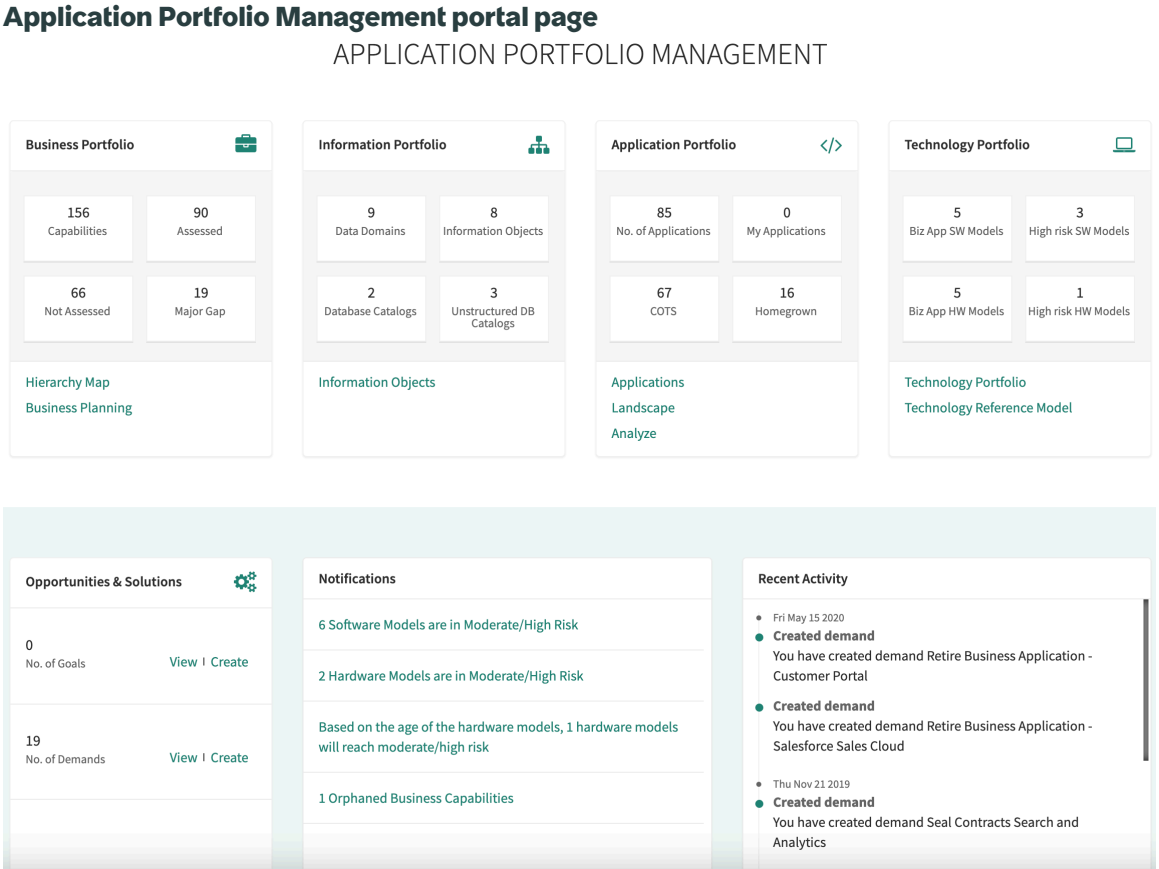
Application Portfolio Management portal page



Business Portfolio

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

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

Information Portfolio

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

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

- Data Domains: Total number of records in the Data Domain [sn_apm_data_domain] table.
- Information Objects: Total number of records in the Information Object [cmdb_ci_information_object] table.
- Database Catalogs: Total number of records in the Database Catalog [cmdb_ci_db_catalog] table.

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- Unstructured DB Catalogs: Total number of records in the configuration item tables such as:
  - configuration file (cmdb_ci_config_file)
  - file system (cmdb_ci_file_system)
  - exchange mail box (cmdb_ci_exchange_mailbox)

Note:

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

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

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

Application Portfolio

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

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

Technology Portfolio

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

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

Opportunities & Solutions

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

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

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To create a demand from the application menu, navigate to **Application Portfolio Management** > **Application Portfolio Analysis** > **Demands**

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

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

Notifications

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

Recent Activity

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

Management of business applications

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

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

Assessment of Business applications

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

Modeling platform applications and platforms

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

The architecture type values help in the following business cases:

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

For example, you can create a business application record for ServiceNow® platform. Then, create individual business application records such as Application Portfolio Management,

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Financial Management, and Project Portfolio Management and associate these applications to ServiceNow® platform. The distinction between the records whether it is a business application running on a host or a platform hosting the applications lies in the **Architecture type** values of platform application and platform host.

Related topics

- Add or edit a business application
- Business application relationship with CIs for application information
- View business application roadmap
- Suggestions to relate technology models to an application service
- Monitor business applications with the application landscape dashboard

Business application relationship with CIs for application information

Business application is a new CMDB CI class. You can create relationships between the business application and other CIs. Functionally, two applications can be integrated or connected to each other to establish a relationship between them. You can relate your business applications to other infrastructural CIs like database and webservers.

To get reports about a business application, there must be an association between the application and the CIs that make up the application. Hence, business applications have to be integrated with the other CIs to examine the CI and its relationship from a CI relation formatter.

CMDB dependency views

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

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

In addition to the existing APM-specific configuration items based on references versus relationships, a relationship is established between the Business Capability configuration item and the Business Application configuration item. A reference is also created between the **Parent** related field attribute of the Business Capability table [cmdb_ci_business_capability] and the **Platform Host** related field attribute of the Business Application table [cmdb_ci_business_app].

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

Related topics

- Add or edit a business application
- View business application roadmap
- Monitor business applications with the application landscape dashboard

Suggestions to relate technology models to an application service

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

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

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

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

Working model of the software model suggestions engine

The software model suggestions engine:

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

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

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

Related topics

Associate suggested technology models to an application service

Monitor business applications with the application landscape dashboard

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

Before you begin

You must have the Performance Analytics – Content Pack – Application Portfolio Management (com.snc.pa.apm) plugin activated to use the Application landscape dashboard.
Role required: sn_apm.apm_user

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About this task

Important:

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

For more information on Enterprise Architecture Workspace, see Enterprise Architecture Workspace for Application Portfolio Management. For specific documentation about this feature in the Enterprise Architecture Workspace, see Working with the Enterprise Architecture Workspace dashboard.

On the dashboard, you can view the following reports:

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

Procedure

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

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

Note:

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

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

Related topics

Add or edit a business application

View business application roadmap

Business application relationship with CIs for application information

Suggestions to relate technology models to an application service

Management of business capability

Business capability is the ability of an organization to do its business activity successfully and fulfill its business goals. Use the business capability mapping to establish a CI relationship between the business capability and the business applications. Establish a similar relationship between business capabilities and the application technologies to ascertain the risks involved in using them.

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

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

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

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

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

- Access business process capability map: **Application Portfolio Management** > **Capability Ratings** > **Capability Map**.

Related topics

Assess business capability

Assess business capability

Overview of business capability planning

Rationalization of applications by capability

Overview of business capability planning

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

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

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

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

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Personas governing capability based planning

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

Business owner

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

Application portfolio owner

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

Capability planner

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

What to do next

Use the capability map for planning investments in applications.

Rationalization of applications by capability

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

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

Important:

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

For more information on Enterprise Architecture Workspace, see Enterprise Architecture Workspace for Application Portfolio Management. For specific documentation about this feature in the Enterprise Architecture Workspace, see Rationalization of business applications.

Analyze applications by capability

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

Before you begin

Role required: sn_apm.apm_analyst

About this task

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

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For more information on Enterprise Architecture Workspace, see Enterprise Architecture Workspace for Application Portfolio Management. For specific documentation about this feature in the Enterprise Architecture Workspace, see Rationalization of business applications.

Procedure

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

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

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

   a. Click the configuration icon ( ).

   b. On the form, fill in the fields.

Select Chart Dimensions form

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

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

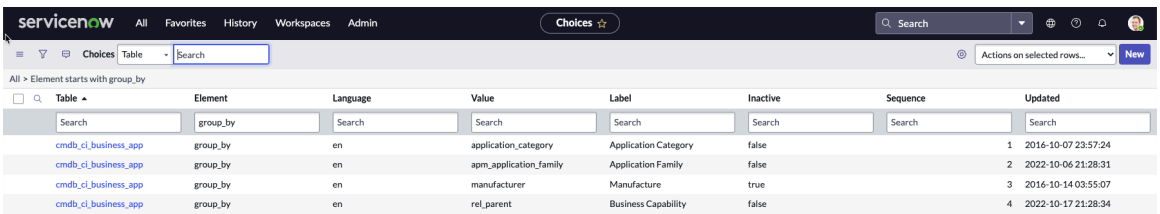
Configure categories to display in Group Analysis page

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

Before you begin
Role required: sn_apm.apm_analyst

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

Procedure
1. Navigate to **All** > **#System Definition** > **Choice Lists**.
2. In the Element column, search for the `group_by` element type.
   The existing group_by choices appear.



3. From the list, select the choice item that you want to show or hide in the Categories list in the Group Analysis page.
4. Open the record to edit.
5. Hide or show the item by selecting or unselecting the **Inactive** check box to.
6. Click **Update**.

Technology Portfolio Management

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

Important:

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

For more information on Enterprise Architecture Workspace, see Enterprise Architecture Workspace for Application Portfolio Management. For specific documentation about this feature in the Enterprise Architecture Workspace, see Update TPM Data for a business application or application service.

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

The software models used in your business applications can be operating systems, database management systems, development tools, and middleware, each of which has a life cycle. If

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these life-cycle stages are not tracked, there are risks where the vendor may not support them any longer and the business applications that run on these technologies are at stake.

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

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

Internal and external lifecycle stages of the software product

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

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

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

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

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

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

Integration with Service Mapping to use Technology Portfolio Management

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

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

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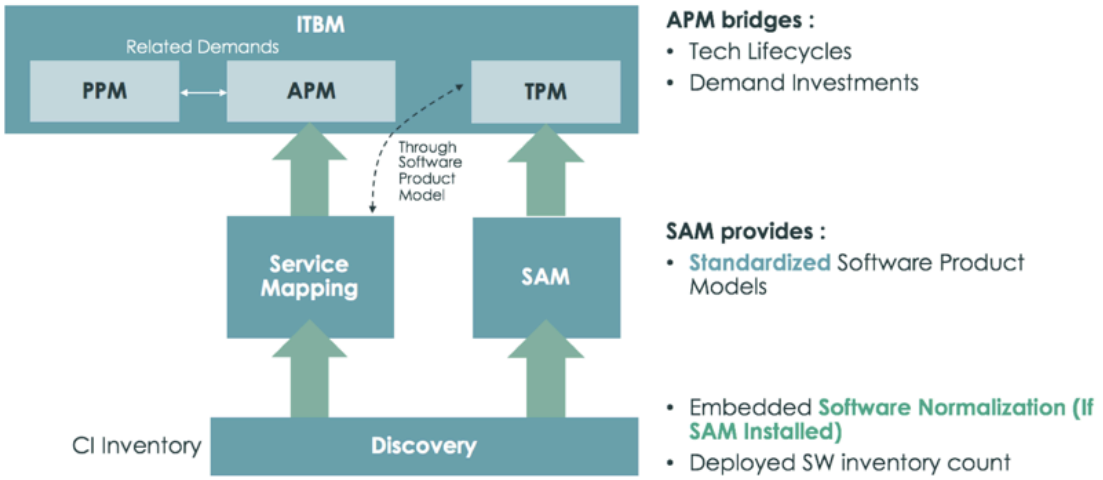
Note:
If you are using the Mapped Application Service [cmdb_ci_service_discovered] table for application instances, then you can proceed to upgrade from Kingston. However, if you are using the deprecated apm_app_instance table to store application instances, then migrate the data in the apm_app_instance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

Connecting software product life cycles to business application

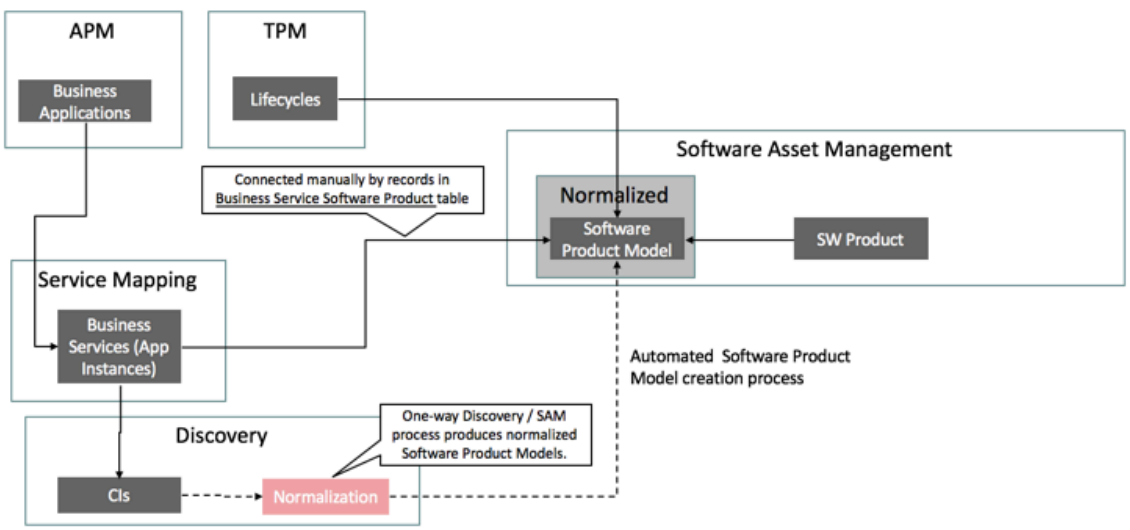


TPM depends on Software Asset Management (SAM) to retrieve the technology information of the software product

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

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

Connecting software product life cycles to business application



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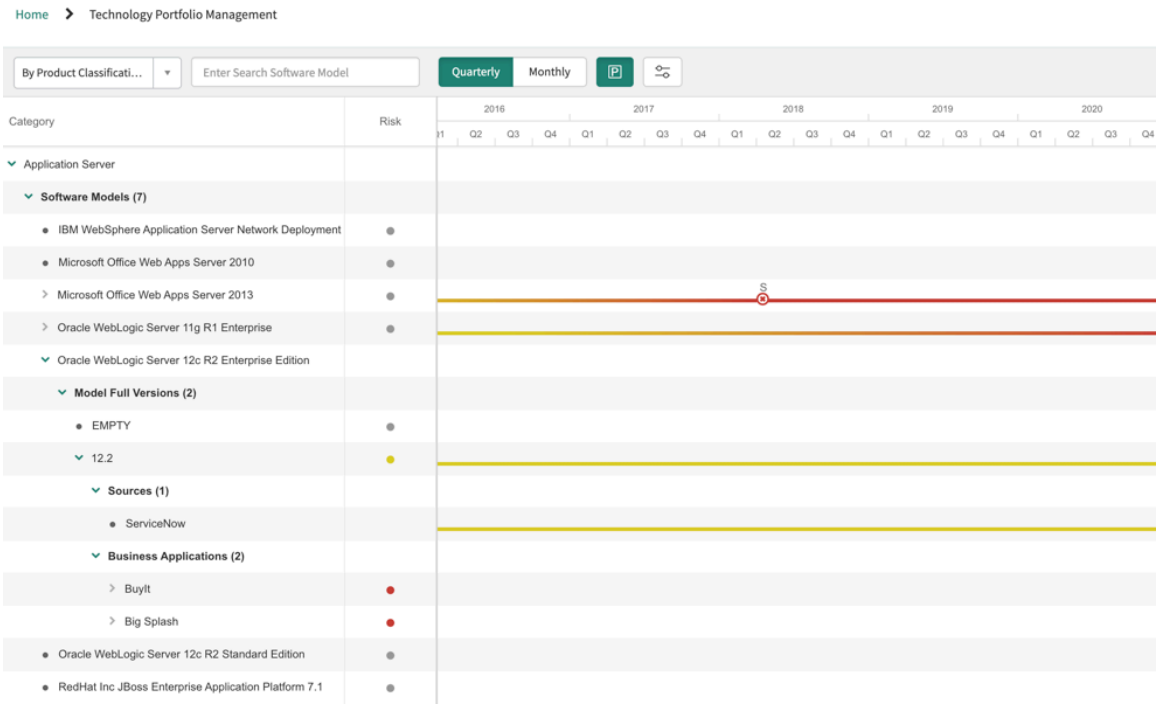
Using TPM depends on SAM plugins. The dependency is as follows:

With SAM Premium plugin

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

TPM timeline showing By Product Classification view



Without SAM plugin

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

Related topics

- View technology risks in timeline
- Relate business application to application service using CI relationship editor
- Associate an application service to hardware model
- Associate an application service to a software model
- Create a risk parameter
- Technology risk calculation
- Run scheduled job to generate risk values

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Technology risk calculation

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

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

Lifecycle stage - Internal and External

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

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

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

Aging - Internal and External

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

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

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

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

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

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

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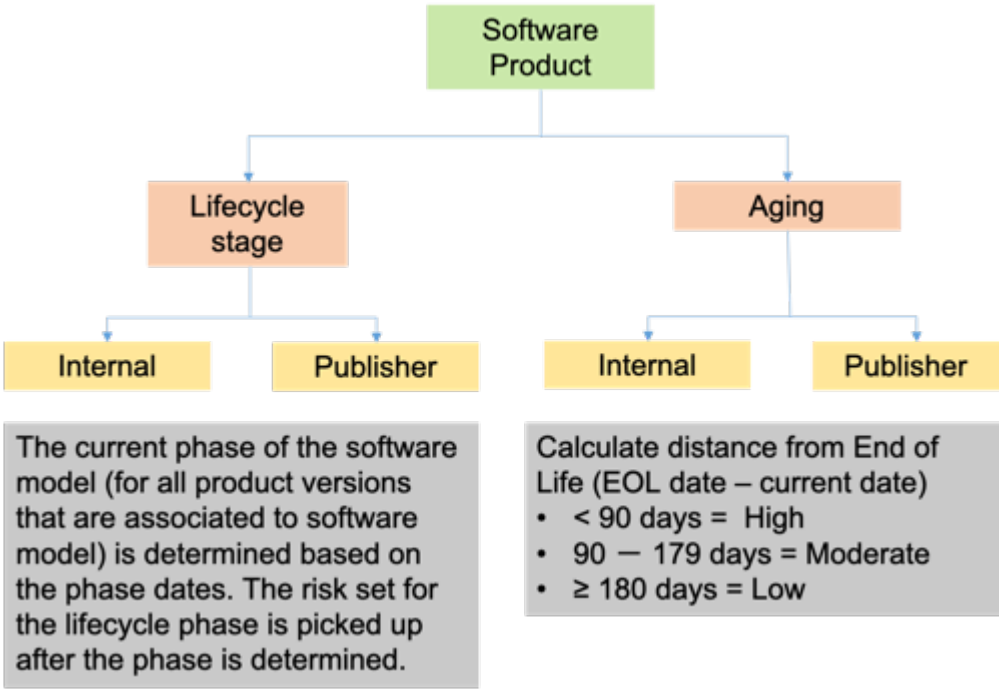
Parameters to determine software product risk

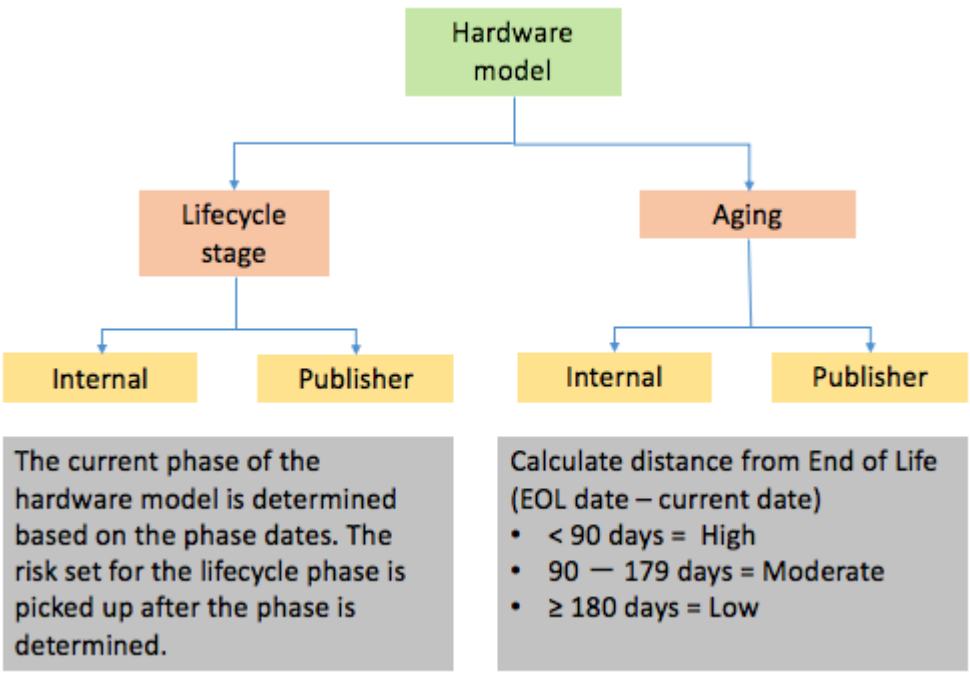
Parameters to determine risk at software model level



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

Parameters to determine hardware model risk

Parameters to determine risk at hardware model level



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

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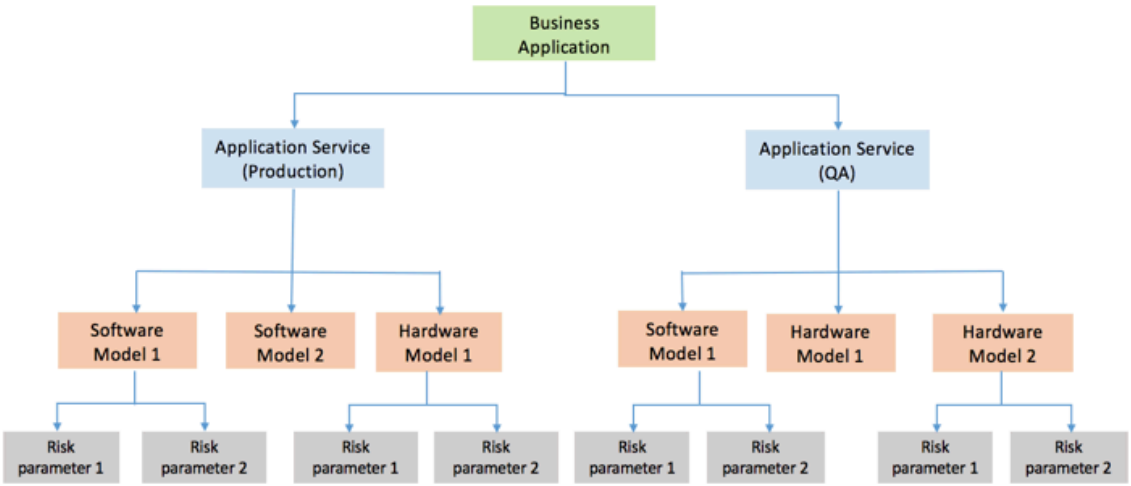
Calculating technology risk at business application level

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

Calculating risk at the business application level



Risk at hardware model level

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

Risk at software model level

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

Risk at application service level

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

Risk at business application level

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

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

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

You can customize the script that is executed to calculate the risks at the product model risk level (hardware and software models), application service risk level, and business application risk level. For more information, see Configure risk bubble up logic.

Related topics

Configure script to customize risk calculation

Run scheduled job to generate risk values

Application Portfolio Management (APM) Cloud Assessment

The Cloud Assessment scoring profile in Application Portfolio Management helps you to evaluate a business application for its cloud migration readiness.

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

Indicators for the Application Portfolio Management (APM) Cloud Assessment

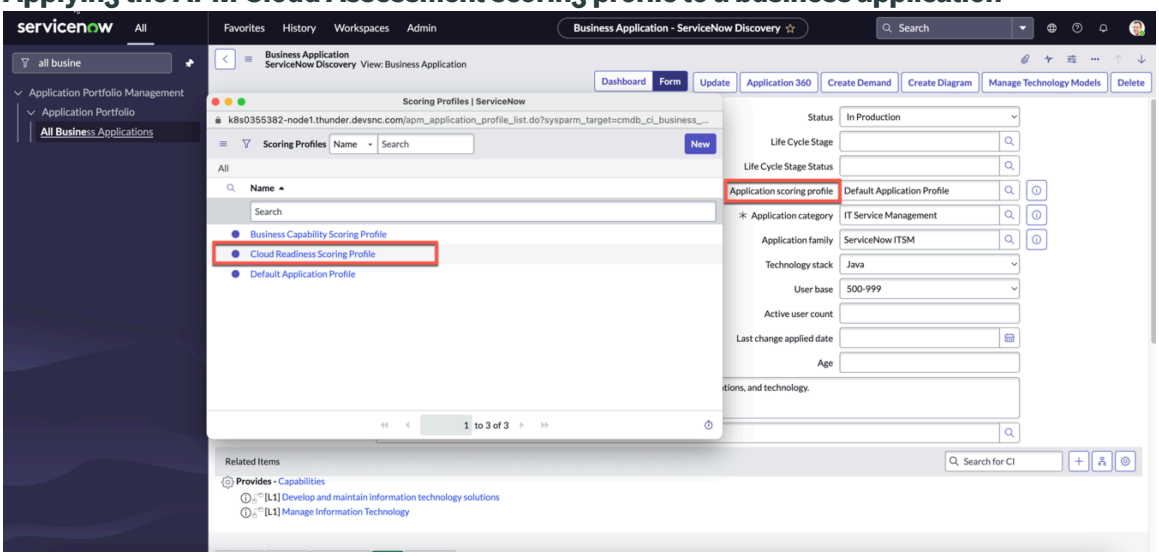
The indicators are associated with the APM Cloud Assessment scoring profile. These indicators help you to evaluate business applications for their cloud migration readiness.

To check out all the indicators, see APM Cloud Assessment Scoring Profile.

Applying the APM Cloud Assessment scoring profile to a business application

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

Applying the APM Cloud Assessment scoring profile to a business application



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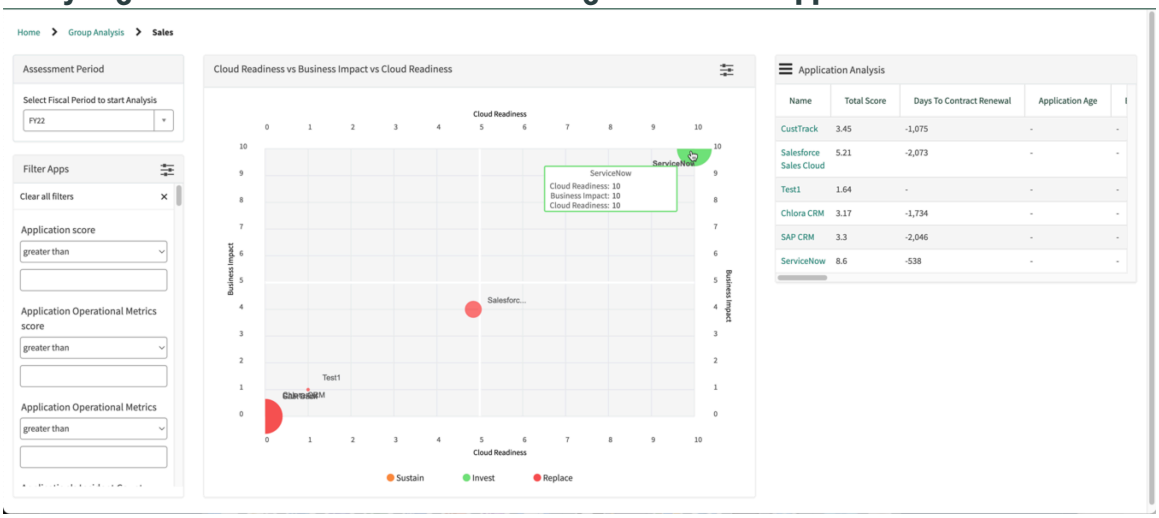
Analyzing the APM Cloud Assessment scoring of a business application

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

Analyzing the APM Cloud Assessment scoring of a business application



Related topics

Install Application Portfolio Management (APM) Cloud Assessment Application

Architectural artifacts

Architectural artifacts are created to describe a system, solution, or state of an enterprise. The goal of architectural artifacts in Application Portfolio Management (APM) is to enable Enterprise Architects to create and manage artifacts in their organization.

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

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

Note:

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

- Review and approve architectural artifacts.
- Keep track of artifacts versions.
- Relate architectural artifacts to categories that are configured to match the needs of the organization.
- Associate your architectural artifacts to your organization's business capabilities and business applications.

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The Architectural Artifacts feature extends the functionality of the ServiceNow® Document Management plugin (com.snc.platform_document_management) and can create a relationship with ServiceNow® objects: Business Applications and Business Capabilities.

Related topics

- Create or edit an architectural artifact
- Associate an artifact to a business entity
- Managing categories for artifacts
- Create an artifact version
- Approve or reject an artifact version request
- Approve architecture review requests
- Application Portfolio Management (APM) integration with Lucidchart

Managing categories for artifacts

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

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

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

Business Application Lifecycle Management services

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

Application Portfolio Management (APM) integrates with Service Catalog to create a service catalog category called Business Application Lifecycle Management Services.

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

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

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

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

Related topics

Use Business Application Lifecycle Management to request or retire an application

Manage Business Application Lifecycle Management service requests

Use Business Application Lifecycle Management to request an architecture review

Application assessment

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

Watch this five-minute video to learn more about APM Scores and Indicators.

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

Related topics

View all application scores

View application indicator scores

Add or edit a scoring profile

Add or edit an application indicator

Activate or turn off an application indicator

Add a business capability

Update the hierarchy of a business capability

Framework setup for application assessment

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

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

Identify cost saving opportunities

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

Organize applications to determine their rationalization

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

Identify opportunities for modernizing and investing in application

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

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

Note:
APM supports only the Fiscal Calendar type, Standard.

Related topics

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

Preconfigured indicators and their source applications

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

Preconfigured indicators and sources

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

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Preconfigured indicators and sources (continued)

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

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Preconfigured indicators and sources (continued)

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

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Preconfigured indicators and sources (continued)

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

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Preconfigured indicators and sources (continued)

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

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Preconfigured indicators and sources (continued)

Indicator name	Frequency	Type	Source	How is it calculated?	Description	Jobs
			(Change_Request table) Fields: Opened, Closed State = Closed, Business Application = any of the APM Business Applications, Closed today		Daily and historical data collection.	

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

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

Related topics

Assessments

Get started with Survey Management

Performance Analytic indicators to measure application performance

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

Application Portfolio Management uses indicators that are sourced from Performance Analytics (PA). These indicators give a count of incidents, problems, changes, and the number of change requests that were closed on a given day. Follow the given order to run the PA jobs at the

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scheduled time, and get the scores of the indicators to evaluate the performance of your business applications.

Order in which to run PA jobs and generate scores

You should run the scheduled jobs in the following order:

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

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

Note:

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

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

Frequency at which indicator scores are generated

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

Monthly

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

Quarter

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

Yearly

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

Note:

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

Collection of PA indicator score data

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

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

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

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APM data collection frequency

APM frequency	Data source indicator frequency
Monthly	Monthly
Quarterly	Monthly and Quarterly
Yearly	Monthly, Quarterly, and Yearly

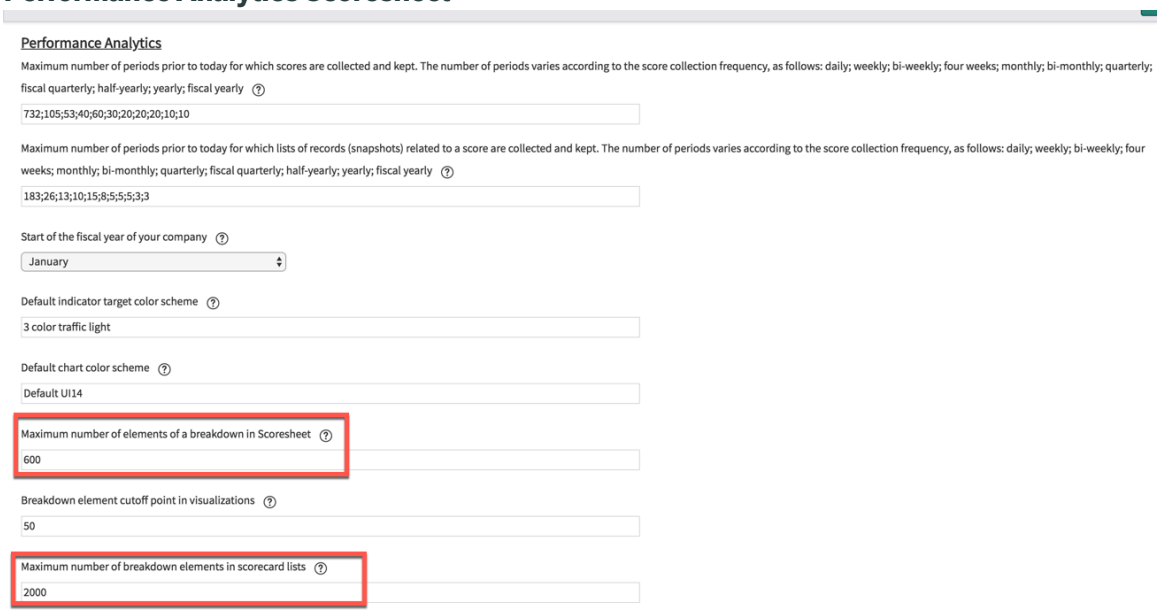
If you are an APM customer, who has upgraded to the Washington DC release, then the **Daily** frequency of Performance Analytics data source indicator is not available. `RemoveDailyFreqAndUpdatePAIndicator` fix script automatically removes the **Daily** frequency of PA indicators and updates the frequency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

Limitations to display application breakdowns in PA scoresheet

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

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

Performance Analytics Scoresheet



3. Enter the maximum number in the **Maximum number of breakdown elements in scorecard lists** field.
4. Click **Save**.

Job schedule to compute application scores

After you set up indicators, create score profile, and attach profile indicators, schedule a job to periodically compute the application scores.

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

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

Normalization of application scores

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

The preconfigured indicators or the indicators that you created retrieve their related data based on the frequency set at the indicator definition stage. This data is captured in the **Application weight** column of the Application Indicator Score [apm_app_indicator_score] table. The **Target maximum** and **Target minimum** that are set while creating an application indicator are for calculating the applications normalized value.

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

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

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

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Note:

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

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

For example, consider a scenario where:

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

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

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

For example, consider a scenario where:

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

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

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

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

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

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

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

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

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

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

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

Note:

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

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

Sample application scores

Business Application	Indicator	Application Weight	Normalized Value (NV)	Indicator Score (NV * 30%)
Application A	Cost	100	10	3
Application B	Cost	150	4.5	1.35
Application C	Cost	200	1	0.3

Business Application	Indicator	Application Weight	Normalized Value (NV)	Indicator Score (NV * 50%)
Application A	Incidents	10	10	5
Application B	Incidents	80	3	1.5
Application C	Incidents	100	1	0.5

Business Application	Indicator	Application Weight	Normalized Value (NV)	Indicator Score (NV * 20%)
Application A	CSAT	10	10	2
Application B	CSAT	2	1	0.2
Application C	CSAT	3	2.125	0.425

Normalized value and application score for an assessment

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

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

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

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

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

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

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

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

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

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

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

The app occurrence is the occurrences of a business application.

Visualization of application performance

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

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

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

Related topics

View application indicator scores

View all application scores

Analyze application scores in a bubble chart

Monitor performance, costs, and workloads in Application 360

Assess the performance of applications in the dashboard

Application strategy

Formulate your decisions and align them with your organizational goals as Application Portfolio Management collects metrics on applications across various dimensions.

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

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

Related topics

Create a goal for an application strategy

Create a demand towards achievement of goal

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Create a program for an application goal

Create a guided plan to execute a program

Guided plan to execute a program

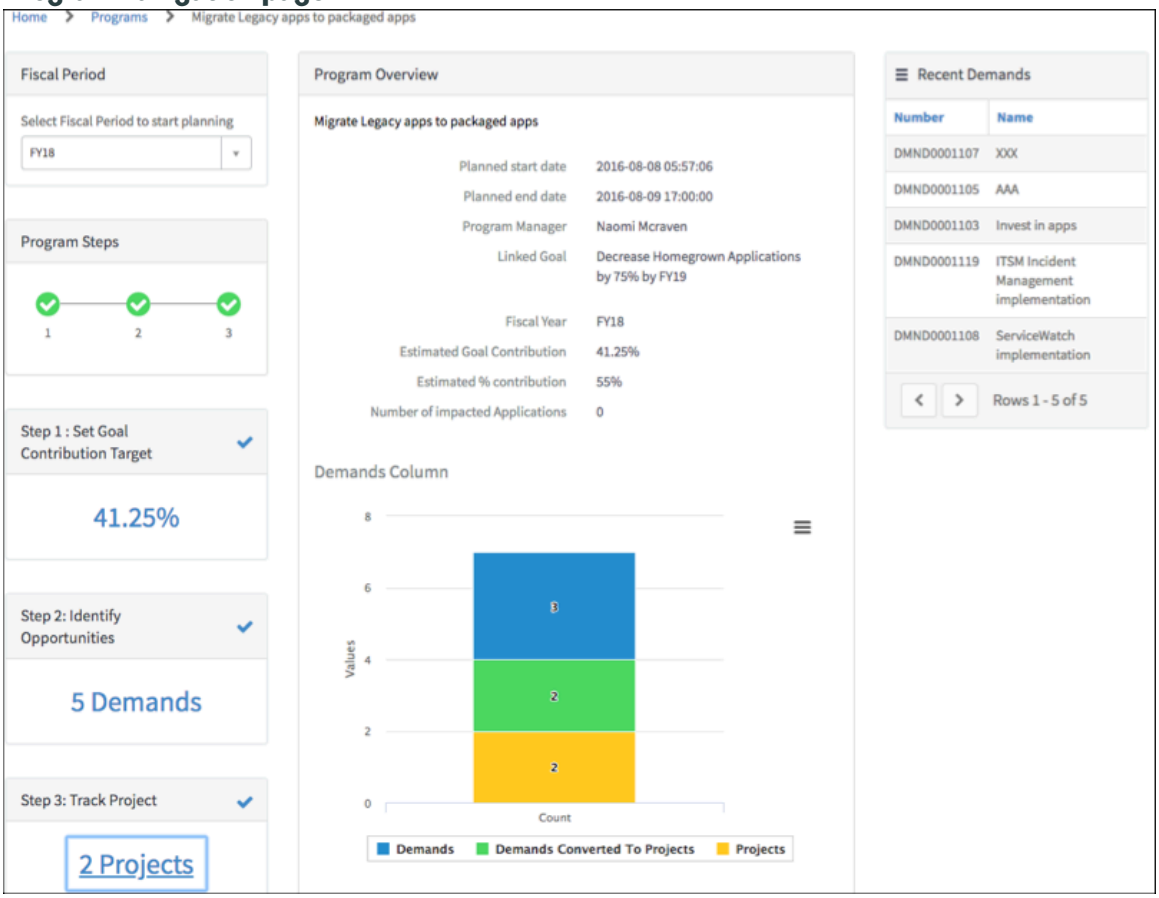
After you create a program, you can use the guided plan to formulate steps in executing the program that you have created.

Note:

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

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

Program navigation page



The Program Navigation page is divided into these sections:

Fiscal Period

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

Program Steps

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

Step 1: Set Goal Contribution Target

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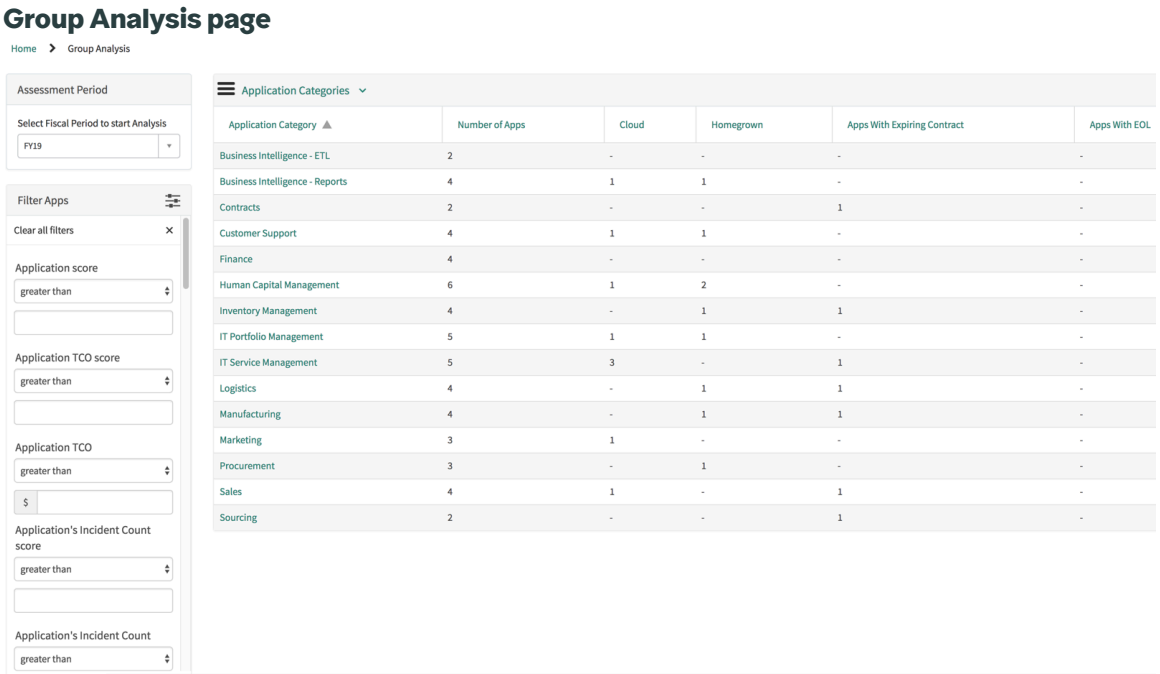
Use the link to set the goal contribution target for the fiscal period.

Step 2: Identify Opportunities

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

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

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



Assessment Period

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

Filter Applications

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

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

Application Categories

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

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

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

Bulb icon ( )

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

Step 4: Track Project

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

Program Overview section

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

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

Demands Column

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

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

Recent Demands

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

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

Technology Reference Model

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

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Overview and benefits of a TRM

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

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

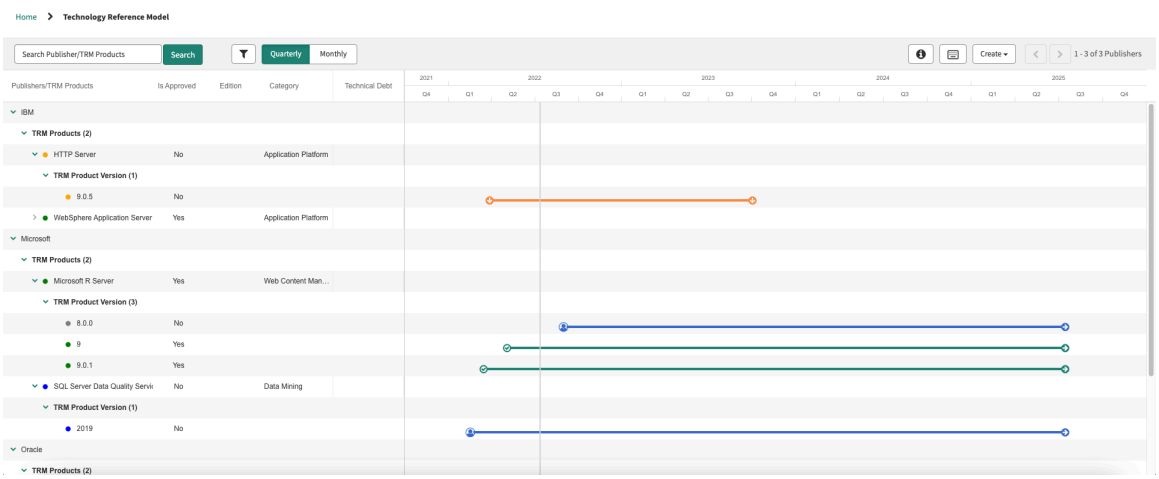
You must define the standards for the software to be used. You must define the software versions that are permitted for use in your organization. Also, you must have a way to explore when a non-permitted software is being used within the organization and in which business applications.

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

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

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

TRM products view



TRM Product Lifecycle

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

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

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TRM and other modules

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

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

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

Related topics

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

Manage Technology Reference Model (TRM) technical debt

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

Before you begin

Role required: sn_apm.apm_analyst

About this task

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

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

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

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

    A technical debt is created if the following condition isn't met for a TRM Product lifecycle:
    - TRM phase with production approved AND
    - TRM product's TRM phase with production approved AND
    - Version matching the lifecycle full version of the application service software model record AND
    - Phase start date <= Today's date <=phase end date.

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

    Technical debt is created if the following condition isn't met for a TRM Product Lifecycle:
    - TRM phase with production approved AND
    - TRM product's TRM phase with production approval AND
    - Version is/starts with (based on version operator and isSampPluginInstalled) version of the associated software model AND
    - The edition is/starts with (based on edition operator and isSampPluginInstalled) edition of associated software model AND
    - Phase start date <= Today's date <=phase end date.

Procedure

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

Risk management for business applications

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

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

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

The key benefits of this integration are:

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

High-level workflow of the GRC and APM integration solution

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

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

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

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

Related topics

Application risk assessment using Advanced Risk Assessment

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Product lifecycle data on the timeline

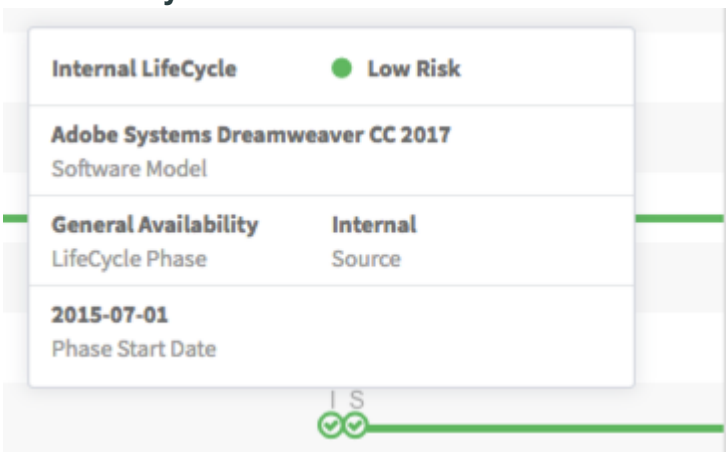
The lifecycle data of software models (of each full version) and hardware models depend on its type, phase, source, dates, and the associated risk. Understand the conditions and considerations applied to denote the software model risks on the timeline. This knowledge enables you to decode the characters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

Lifecycle phases on the timeline

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

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

Internal lifecycle information



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

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

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

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

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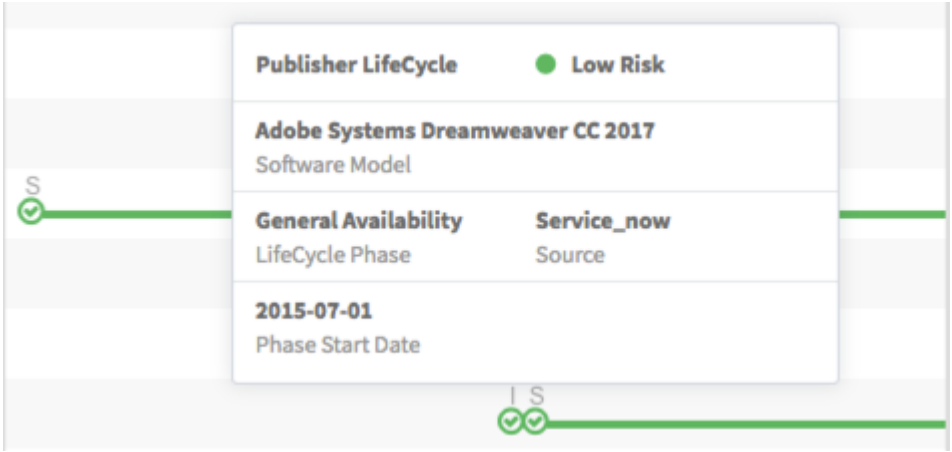
Lifecycle sources on the timeline

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

Publisher lifecycle information



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

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

Date range configuration for the lifecycle phases

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

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

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

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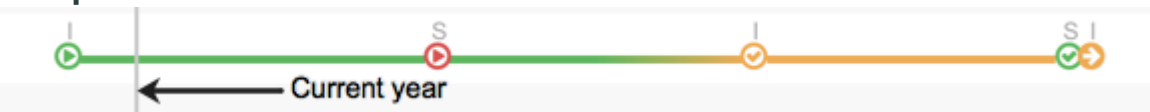
Color-coded timeline to identify product model risks

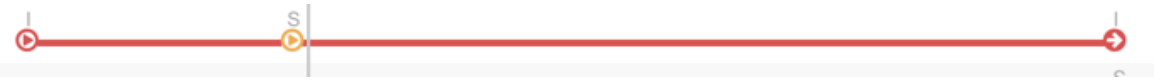
- If there are internal as well as publisher records for a phase, then internal overrides the publisher for that phase.

Example of timeline where internal overrides external



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

Example of last phase acquiring the risk color of the previous phase that is not overridden



Assessment form for risk and control information

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

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

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

Information portfolio

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

Information portfolio data model

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

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

Application Portfolio Management (APM) integrates with information portfolio by relating a business application with the database. The database provides the information to the application using an intermediary cmdb CI class called information object [cmdb_ci_information_object] table.

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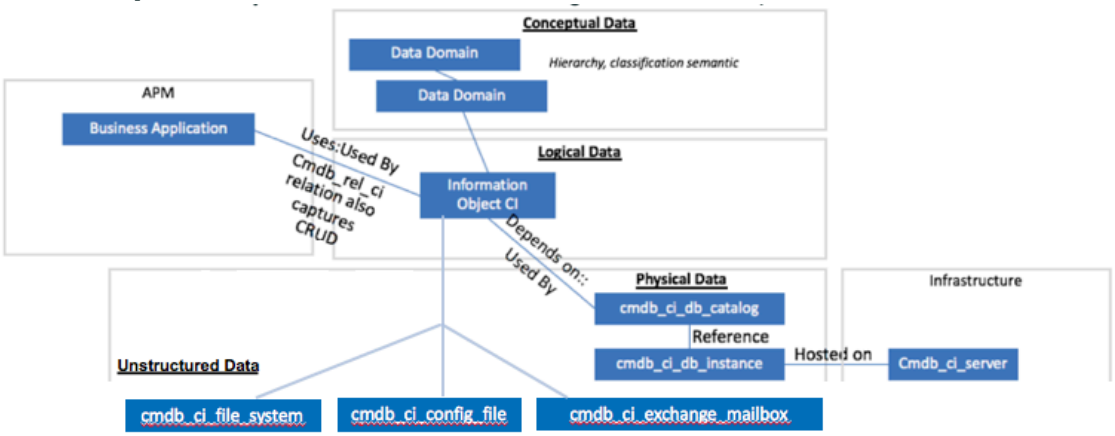
The business application is related with the information object by establishing Uses::Used by cmdb CI relationship. The information object, in turn, is linked to the database catalog and instances by establishing Depends on::Used by cmdb CI relationship.

Information portfolio data model



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

Plugin activation procedure

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

Related topics

- Create a data domain
- Create an information object referencing data domain
- Relate a business application to an information object
- Relate the information object to the database catalog
- Relate a business application to another business application

Domain separation and Application Portfolio Management

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

Support level: Basic

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

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

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

How domain separation works in Application Portfolio Management

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

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

Related topics

Set up domain separation for APM users

Application Portfolio Management Platform Analytics Solutions

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

Platform Analytics Solutions

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

Important:
Set up and test Platform Analytics Solutions on a non-production instance before enabling them in production.

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

Related topics

Platform Analytics Solutions

Activate your Performance Analytics subscription

Predictive Intelligence for Application Portfolio Management

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

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

Predictive Intelligence for Application Portfolio Management has the following benefits:

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

Solution definitions for Predictive Intelligence of Application Portfolio Management

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

Solution definition for Application Portfolio Management

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

Maintaining prediction accuracy

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

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

APM Predictive Intelligence Workbench

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

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

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

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

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

Activation information

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

Exporting Application Portfolio Management data to Microsoft PowerPoint

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

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

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

You can export the following Application Portfolio Status data:

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

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

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plugin, creating templates, and report types, see Export to PowerPoint for Strategic Portfolio Management.

Related topics

Export data to Microsoft PowerPoint

Configuring Application Portfolio Management

Learn about the process required to set up Application Portfolio Management to gain a comprehensive understanding of the applications used in your organization.

Activate Application Portfolio Management

An administrator can activate the Application Portfolio Management plugin (com.snc.apm).

Before you begin

Role required: admin

About this task

The Application Portfolio Management (com.snc.apm) plugin is the basic plugin for the application.

The Application Portfolio Management plugin activates the following related plugins if they are not already active:

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

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

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

Application Portfolio Management – ATF Tests plugin (com.snc.apm.atf) plugin

To validate Application Portfolio Management and that it works after you make any configuration change such as apply an upgrade or develop an application.

Read only roles for Application Portfolio Management plugin (com.snc.apm_read_roles)

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

Application Portfolio Management Core plugin (com.snc.apm_core)

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

Domain Support – Domain Extensions Installer system plugin

To enable the domain separation feature for APM.

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

To retrieve historic data that are older than six months.

Activate the following plugins for additional features:

PPM Standard (com.snc.financial_planning_pmo)

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

Financial Management For APM (com.snc.financial_management_for_apm)

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

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

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

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Procedure

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

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

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

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

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

What to do next

Use the **APM Guided Setup** to set up the Application Portfolio Management.

Application portfolio administration

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

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

Application Portfolio Management product view

Use APM to gain a comprehensive understanding of your organization's applications so you can identify redundancies and decrease budgetary costs. The goal of this product view is to help you to understand how APM key entities work with the core CSDM framework.

Note:
If you do not use CSDM 4.0 or later versions, see the Rome documentation for CSDM. For implementing CSDM framework, see Implementing the CSDM framework in stages.

APM home page

The APM home page organizes many of the CSDM tables used by APM.

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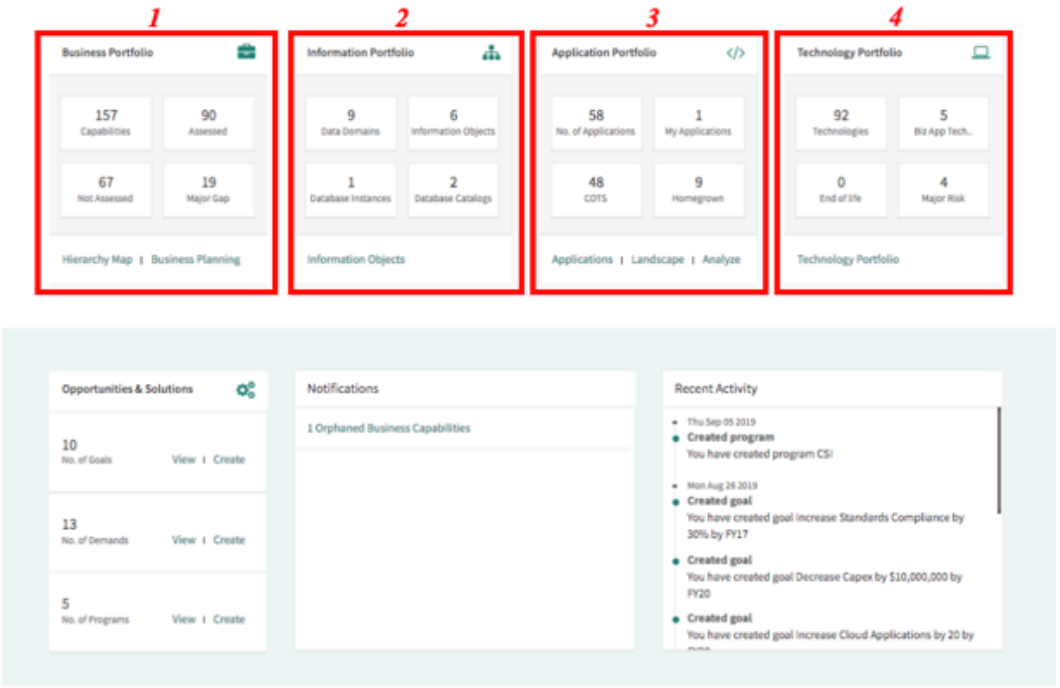

Business Portfolio

View the number of defined business capabilities that have been or will be assessed, and the number of business applications that support capabilities but are at-risk.

For more information about using capability mapping to establish a configuration item (CI) relationship between the business capability and the business applications, see [product].

Information Portfolio

Capture the asset information as information objects. You can connect the information object to your business applications to create an application portfolio that you can use at any time.

The information portfolio links to the following data:

- Data Domains: Total number of records in the Data Domain table [sn_apm_data_domain].
- Information Objects: Total number of records in the Information Object table [cmdb_ci_information_object].
- Database Instances: Total number of records in the Database Instance table [cmdb_ci_db_instance].
- Database Catalogs: Total number of records in the Database Catalog table [cmdb_ci_db_catalog].

For more information about the information portfolio and the information portfolio model, see [product].

Application Portfolio

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

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Select **Applications** to navigate to the list view of business applications in your organization.

For more information about measuring the usability, cost, quality, performance, and risk of applications, see [product].

Technology Portfolio

Use metrics to measure the usability, cost, quality, performance, and risk of applications.

For more information about technology portfolio management and how it relates to business applications, see [product].

Application Portfolio Management and CSDM tables

Application Portfolio Management manages and uses CSDM tables. Several ServiceNow products benefit from and add value to APM.

CSDM tables managed by APM

1. Business Capability table [cmdb_ci_business_capability]
2. Business Application table [cmdb_ci_business_app].

Note:

APM uses the **Platform** and **Platform App** fields on the Business Application table to establish the relationship between a business application and the underlying application service. APM manages the Platform Host / Platform App relationship using a reference on the APM form, not through a CI relationship.

The relationship connects the record of the business application that is used in planning and design with where and how it's realized operationally, represented by application services. The relationship accounts for each use of a business application in the development, test, and production environments (dev, test, and prod application service instances). Often there are multiple production deployments. For example, a large retailer uses a business application that runs a cash register in each of its 1,000 stores. There are therefore 1,000 production instances of the application service — one per store — for that one business application. See the "CSDM in a nutshell" video for additional discussion of the relationship.

3. Information Object table [cmdb_ci_information_object]

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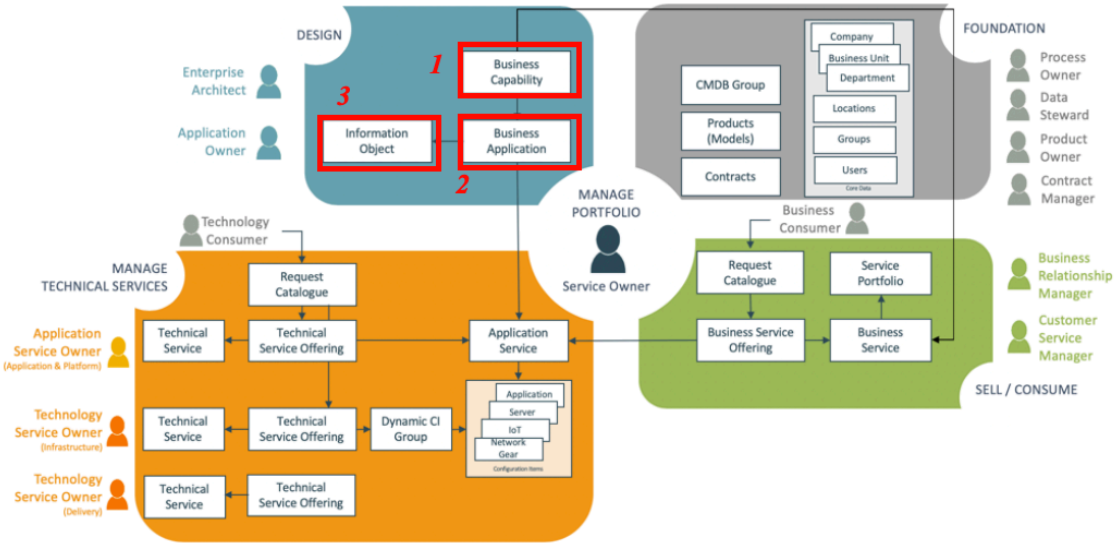

CSDM tables used by APM

- Mapped Application Service table [cmdb_ci_service_discovered]
- Business Capability table [cmdb_ci_business_capability]
- Business Application table [cmdb_ci_business_app]
- Information object table [cmdb_ci_information_object]
- SDLC Component table [cmdb_ci_sdlc_component]

Products that add value to APM

When you use APM with any of the following ServiceNow products, you increase the value you get from APM:

- Discovery provides details about the hardware and software CIs you are using.
- Service Mapping provides details about the application instance service in the [cmdb_ci_service_discovered] table, relating infrastructure and application [cmdb_ci_appl] CIs.
- Asset Management provides the related product model. Software Asset Management (SAM Foundation) and Hardware Asset Management (HAM) provide life-cycle data for Technology Portfolio Management.
- Project Portfolio Management views the business application roadmaps. Includes demands, projects, sprints and epics.
- Agile Development views the backlog stories and epics of each business application in the application roadmap.

Products that benefit from APM

The following ServiceNow products gain value from APM:

- IT Service Management (ITSM): Services have the context of the business and applications, along with the information and technologies layered beneath them.
- Information Technology Operations Management (ITOM): Understands the business context for the application services along with the hardware and software being managed.

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- Governance, Risk, and Compliance (GRC): Auditors can leverage the business applications and related information objects. This helps auditors understand the design-time data sensitivity for scoping audits, measuring risks, and managing audit activities.
- Asset Management: Manages the software and hardware life cycles for business applications and business services.

Application Portfolio Management use case

APM lets you define a single, version-agnostic entity that represents all instances, technologies, and data used for planning and reporting.

APM use case

You can use a business application for planning and governance activities, such as funding, road mapping, and risk reporting. Rationalizing business applications is a continuous process, and is critically important to reducing costs and planning technology transformations. Rationalizing business applications is also critical for completing mergers, divestitures, or other broad-impact business-led changes.

Key features of the APM use case

The CMDB, when used by the CSDM framework, provides value to APM in the following ways:

- Application life cycle management. This includes:
  - Registering a new business application (included in the base system).
  - Updating a business application
  - Decommissioning a business application, including all the related application services and infrastructure. Because application services are logical in nature, they should use the Logical life cycle states. Application services follow the same life cycle guidance as any other logical CI.
- Business application portfolio assessments based on metrics or related impacts.
- Roadmap planning and creating new ideas, demands and projects.
- Data certification process
- Total cost of ownership (TCO) calculations (using the Financial Management module)
- Manage the following related entities:
  - Information objects table [cmdb_ci_information_object]
  - Business capabilities table [cmdb_ci_business_capability]

Results of the APM use case

With this use case, CSDM provides APM a consistent way to model business applications and relate critical data. The use case ensures that the application services (instances) are defined as required for automating the technology risk scores, costs, and other metrics used for analysis.

TPM use case

TPM gives you a better understanding of the risks associated with using software and hardware that is at the end-of-life (EOL) date. You can use the details provided by the CSDM framework to determine the risk of using software and hardware that is at EOL. Each product life cycle EOL date is calculated, then combined following the CSDM framework to provide a score at the Business Application level.

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Results of the TPM use case

The CSDM framework provides a consistent data structure. This consistent data structure makes it easier for you to manage the life cycles of your technology and analyze the combined technology risks.

Because of the way the CSDM framework is structured, you can leverage many products from ITOM, Service Management (Service Portfolio Management), and IT Application Management (ITAM).

The risks of using EOL technologies are calculated based on the life cycle of each software and hardware product model identified in the CMDB, and matched with a software and hardware product model.

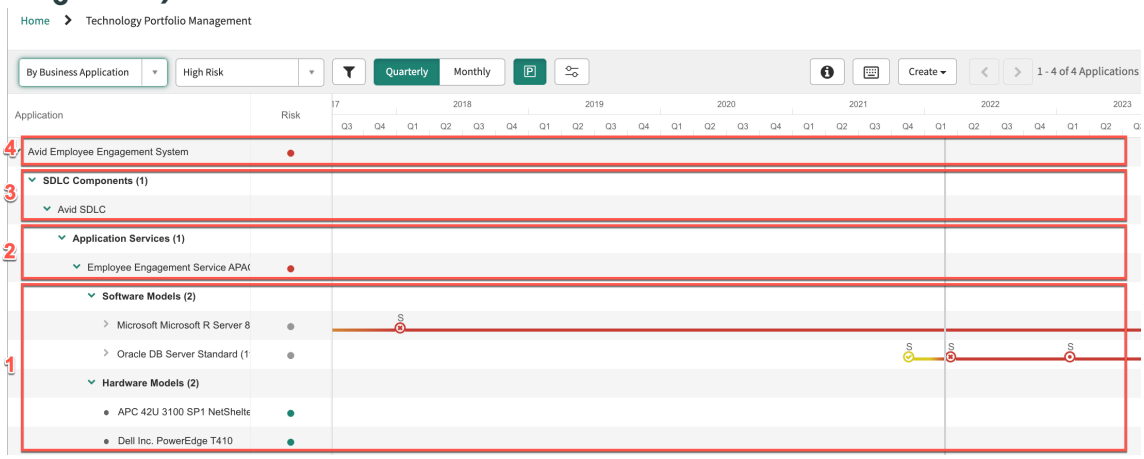
You can enter the life-cycle data manually, import it from an external source, or use the data provided with your Software Asset Management Professional or Hardware Asset Management license.

The risks are calculated and displayed in a hierarchy. Business application is at the top level, SDLC Components are under the business application, then Application Services indicate each deployment (instance), and software and product models are at the lowest level. Risks are calculated in the order shown below, and are based on the time span between the current date and the EOL date.

Note:
Configuring SDLC component is optional. Even without SDLC component configuration, you can connect business applications with the application services directly.

1. Hardware and software product model — Displays the current life-cycle phases, sources, and indicates the specific models at-risk
2. Application Service level — Displays the combined risk status of all underlying hardware and software product models used in the Application Service (Instance).
3. SDLC Component — Displays the SDLC components along with the associated application services and business applications
4. Business application level — Combines all the underlying Application Service (Instances) to determine the overall risk rating at a portfolio level.

Technology Portfolio Management home page (with the SDLC Component configuration)



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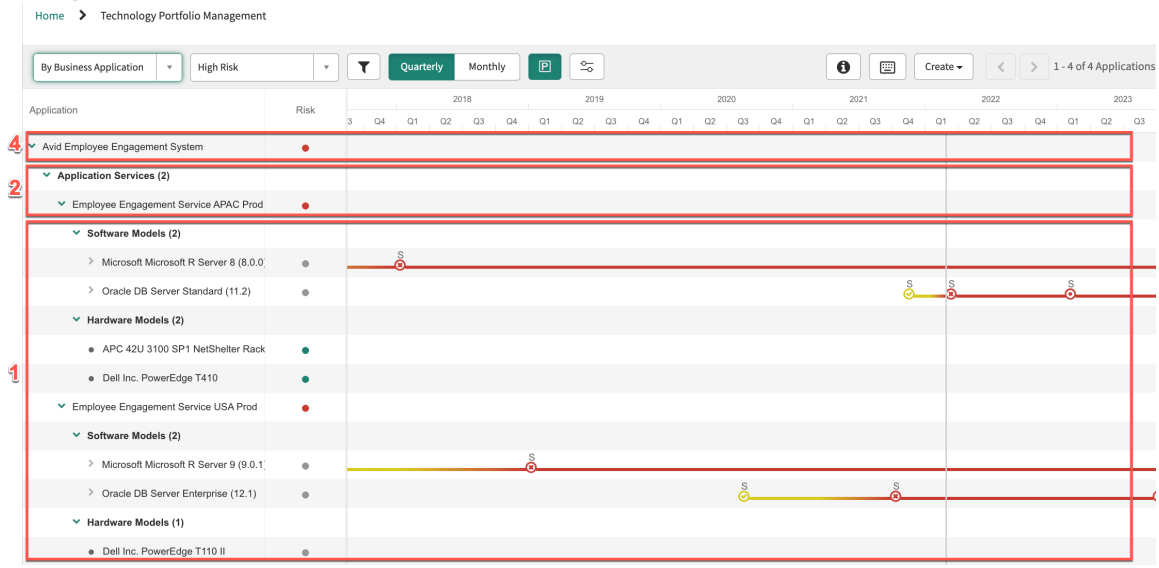
Technology Portfolio Management home page (without SDLC Component configuration)



The following information is used to determine the EOL impact to business applications and their installed application services (instances):

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

  The name of the Application Service Software model table is [sn_apm_tpm_service_software_model].

- The software model has a sequence of life-cycle stages. The life-cycle stages range from the installation date to the retirement date.

  Some business organizations set an internal date based on the life-cycle phase of the software models. These software model phases can be Early Adopter, Mainstream, Declining use, and Retired.

  Similarly, the software vendors might also set a date for the software based on the vendor life-cycle phases, such as Pre-release, General Availability, End of Life, and Obsolete. Vendor support might vary depending on the phase of the technology. For example, when the software model reaches the Obsolete phase, the vendor might stop supporting the technology.

  The Software Model Life cycle table is named [sam_sw_model_lifecycle].

Application Portfolio Management considerations

Consider these points while implementing the CSDM framework.

- Business services are what IT provides to the customer. A business service is a service type that is published to business users. A business service typically implements one or more business capabilities.

  Usually, business users order business services. Business users can select the desired offering and service commitment levels via the Service Catalog. For example, procurement, shipping, and finance.

  - A business service is an operational CI.
  - A business service must be a one-level service and not a hierarchy of business services.

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- A business service can be used for impact in Incident, Problem, and Change and for approvals for Change.
- A business service must be focused on the consumer or seller.

- A business capability is a high-level capability that supports a business model or fulfills a mission for your organization.

  A business capability typically describes a specific task that achieves one or more business outcomes. Business capabilities are often listed as verbs (for example, manage financials or provide IT support services). You can use business capabilities to rationalize and prioritize the cost of business applications and business services.

- Using Technology Portfolio Management: The Software Asset Management Foundation plugin provides life-cycle data that Technology Portfolio Management uses. However, you can manage that data manually or get it from another source. Both products share the underlying tables, but are independent and you can use them separately.
- For information about managing your application portfolio, see Application Portfolio Management - Inventory Best Practices.
- Applications and business applications use different tables and represent different elements.

  Business application

  - Uses the Business Application table [cmdb_ci_Business_App].
  - Represents the single, logical, construct of the application that comprises application service, environment, software, and hardware in use.

  Application

  - Uses the Application table [cmdb_ci_appl].
  - Represents the specific version of software in use on a server (often populated by Discovery or System Center Configuration Manager (SCCM)).

For additional information about APM, see APM: Application Inventory - Most common questions.

Application classification

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

Set up these attributes for classifying and grouping applications:

Application category

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

Category group

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

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Application family

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

Business Process

This attribute is an optional attribute that is primarily used for filtering and reporting. Level one (L1) of a business process is a high-level representation that outlines the business operations of an organization. Ideally L1 business process can be tagged. For example, Oracle Order Management can be tagged to the business process 'Quote to Cash'. The detailed mapping between the application and the business processes can be created using the CI relationship.

Software Model

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

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

Add or edit an application category group

An application category group is a collection of application categories. Category groups help with filtering and reporting of the application categories. You can create an application category group or edit an existing one to align it with your business requirements.

Before you begin

Role required: sn_apm.apm_admin

Procedure

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

Add or edit an application category

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

Before you begin

Role required: sn_apm.apm_admin

About this task

Each application should have an application category defined. This field is used to describe the purpose of the application, and the key business function this application supports. You can keep the categorization at a high level, like a business function. For example, Sales, HR, Marketing, and Manufacturing. **Application category** field is used to filter Analysis dashboards (2x2 matrix plotting business value versus technical risk).

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Procedure

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

Add or edit an application family

An application family is an attribute to group a set of related applications based on manufacturer classification of their products into product suites. You can create an application family or modify an existing one to align it with your business requirements.

Before you begin
Role required: sn_apm.apm_admin

Procedure

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

Add or edit an application business process

A business process is a structured sequence of tasks. You can create a business process to group a sequence of tasks that help accomplish specific outcomes.

Before you begin
Role required: sn_apm.apm_admin

About this task
You can create a business process or modify an existing one to align it with your business requirements.

Business process or capability hierarchy is an ordered grouping of business processes in a hierarchical fashion. For example, L0 and L1 processes.

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

Procedure

1. Navigate to **All** > **Application Portfolio Management** > **Administration** > **Business Processes**.
2. Click **New** to create a new business process or click the name of an existing process that you want to edit.
3. Fill in the fields.
   For field information, see Business Process Form.

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4. Right-click the form header and select **Save**.
5. If you want to add items to this business process, use the Related Items CI relations formatter.
6. Click **Submit** or **Update**.

Create an application portfolio

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

Before you begin
Role required: sn_apm.apm_admin

Procedure

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

Add a strategy for managing applications

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

Before you begin
Role required: sn_apm.apm_admin

About this task
Create demand actions that are aligned to the application strategy.

Procedure

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

Manage the life cycle of a business application

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

Before you begin
Role required: sn_apm.apm_analyst and sn_apm.apm_user

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

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Starting from the Vancouver release, the application model is automatically created, and the Model ID is added to the business application while adding the business application.

For existing business applications, you can run the *CSDM Product Model Assignment* script to generate the Model ID.

Procedure

1. Navigate to **All** > **Application Portfolio Management** > **Application Portfolio** > **All Business Applications**.
2. Select the name of the business application to open the business application form.
3. In the Related Links section, select the **Application Model Lifecycle** tab.
   A list of life cycles associated with the business application is displayed.
4. Create or edit a life cycle.
   - To create a life cycle, select **New**.
   - To edit and existing life cycle, select **Edit**.
5. On the Application Model Lifecycle form, fill in the fields.

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

Related topics

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

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

Execute a script to generate the application model for existing business applications. An application model is a structured representation of a business application's components and their relationships and interactions within your application landscape.

Before you begin

Role required: admin

About this task

In Enterprise Architecture, the application model is denoted by **Model ID** field for a business application. This model is important for creating the application model life cycle for a business application. For existing business applications, you can run the *CSDM Product Model Assignment* script to generate the Model ID.

Procedure

1. Navigate to **All** > **#System Definition** > **#Scheduled Jobs**.
2. Find and open the# scheduled job*CSDM Product Model Assignment*.
3. Select#**#Execute Now**.

Result

After executing the script, the system automatically creates models IDs for the existing business applications for which the **Model ID** field is empty.

Add a data classification group

Create a data classification group to categorize data classifications.

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Before you begin
Role required: sn_apm.apm_admin

Procedure

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

Add a data classification

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

Before you begin
Role required: sn_apm.apm_admin

Procedure

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

Apply classification tags to an information object

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

Before you begin
Role required: sn_apm.apm_user

Procedure

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

Schedule a data certification task

Keep your business applications inventory up-to-date by certifying the data in the business applications table periodically. Keeping your business application data current helps you to assess your business applications precisely as there are indicators that are dependent on these business applications.

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Before you begin
Role required: sn_apm.apm_admin

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

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

The Application Portfolio Management (com.snc.apm) plugin installs the Data Certification (snc.certification_v2) plugin and requires no separate subscription.

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

- **Business Application Certification On Demand** / **Business Application Certification Quarterly**: Certifies the data in the Business Application [cmdb_ci_business_app] table. Use **Business Application Certification On Demand** to schedule as and when required, and **Business Application Certification Quarterly** for every quarter. Use either of the schedules as per the specified time interval or on demand.
- **Application Service Software Model Certification On Demand**: Certifies the software model and full version fields in the Application Service Software Model [sn_apm_tpm_service_software_model] table.
- **Software Product Lifecycle Internal Source Certification on Demand**: Certifies the full version field in the Custom Software Product Life cycle [sam_custom_sw_product_lifecycle] table.

Procedure
1. Navigate to **All** > **Application Portfolio Management** > **Administration** > **Certification Schedules**.
2. Click **New** to create a new record of certification schedule.

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

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

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

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

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

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

These email notifications are inactive by default, which you must activate by setting it to true.

5. To activate the email notifications, navigate to **Service Creator** > **Notifications**.
6. Click open the APM related notification record.
7. Enable the **Active** check box to activate the email notification.

What to do next

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

View and update the application certifications

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

Before you begin

Role required: sn_apm.apm_admin

Procedure

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

What to do next

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

Certify data in business applications table

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

Before you begin

Role required: certification_admin

Procedure

1. Navigate to **All** > **Data Certification** > **Tasks** > **My Tasks**.
2. Click the task number in the **Certification Tasks** list that requires your certification.
3. Click the check box to certify the fields.
   You can certify the data in the fields by any of the following methods:
   - Field wise by selecting the field level check box.
   - Column wise to certify the particular data element for all business applications by selecting the column level check box.

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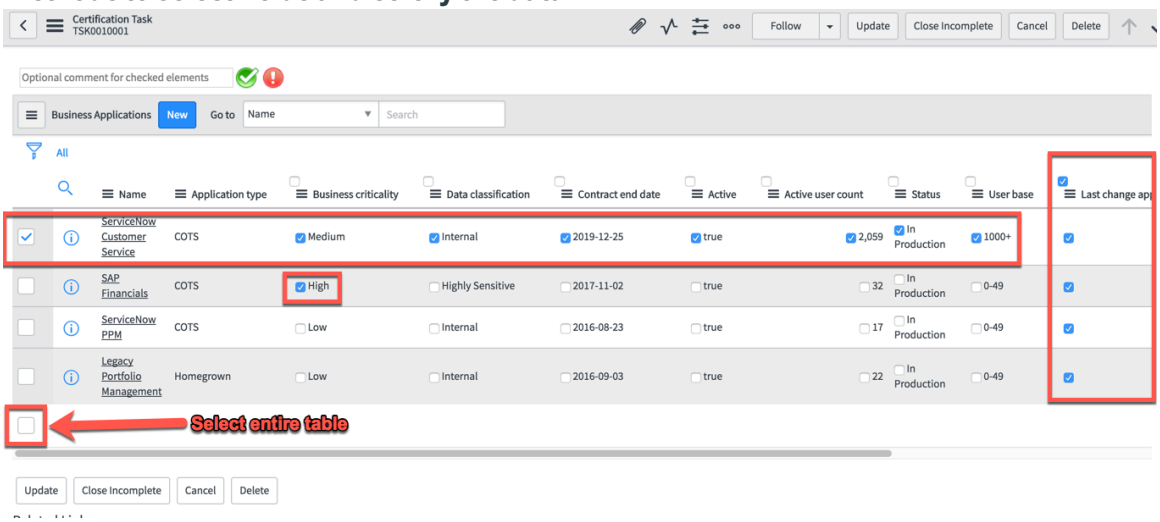
- Row wise to certify all data elements for a particular business application by selecting the row level check box.
- Entire table to certify all data elements for all business applications selecting the check box that selects all rows.

Methods to select fields and certify the data



4. Click the field to update the data if it is not current.
5. Enter your comment for the fields that you have certified and click the green check mark to certify the checked elements.

   A message appears to confirm your certification.

Run audits to determine invalid and missing configuration data

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

Before you begin

Role required: sn_apm.apm_admin

About this task

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

- between the business capability and the business application.
- between the business application and the software models.
- the software products with no life-cycle data.

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

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Procedure

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

   Running the audits help you to do the following:

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

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

   Hardware Models with no life-cycle data

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

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

   Software Products with no life-cycle data

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

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

   Orphaned business capabilities

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

   Business applications related to multiple business capabilities in the same hierarchy

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

   Business applications not related to any software model

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

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

Business applications not related to any business capability

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

Business Applications not related to any Information Objects

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

Business Application and Information Object relation not captured in relation attributes

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

CRUD information not captured for Business Application and Information Object relation

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

Information Objects not related to any Business Application

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

In addition, whenever a certification schedule either On Demand or Quarterly is executed, a notification is shown on the Application Portfolio Management home page. For each certification schedule that is executed, a corresponding notification entry appears on the home page. The notification shows open certification instances that are not 100% complete. Conversely, the home page section doesn't display certification instances that are 100% complete and have not been generated at all.

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

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

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Train the similarity solution for APM to categorize applications while registering

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

Before you begin

Ensure that the Application Portfolio Management – Predictive Intelligence plugin (com.snc.apm.predictive_intelligence) is activated.

Role required: ml_admin

Procedure

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

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

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

Similarity Definition form

Field	Definition
Label	Unique name for your similarity definition.
Word Corpus	Collection of words and phrases related to the name and description of the business application that functions as the vocabulary the system uses to compare your instance records based on their textual similarity.
Processing Language	Dominant language of the dataset that you are training on the solution definition. If the dataset language is Italian, choose Italian. **Note:** English processing is applied to all datasets by default.
Stopwords	Existing word corpus that is relevant to your solution. You can also add stopwords to the list, for example, words like Application.
Training Frequency	Option to retrain from once daily or every 30 days in three months increments up to 180 days.

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Field	Definition
Update Frequency	Frequency at which you want to refresh the data you use to retrieve your similarity results.

4. Click **Update & Retrain**.

What to do next

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

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

Suggest an application category based on similar business applications

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

Before you begin

Role required: piwb_manager

Procedure

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

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

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

Configure script to customize risk calculation

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

Before you begin

Role required: script_include_admin

About this task

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

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You can configure the script at the following levels:

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

Procedure

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

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

   Configure custom script to calculate risks, for example, sn_apm.AppBusinessServicesCustomRiskCalculation

```
var productModelCustomRiskCalculation = Class.create();
productModelCustomRiskCalculation.prototype = {
    initialize: function() {},

    useCustomRiskForProductModel: function(productModelSysID) {
        return false;
    },

    /*
    productModelJson formats is as follows:
        {
            'productType'      : 'software_model/hardware_model',

            'riskParamJson' : { 'riskParamSysID1' : 'riskValue',
                                'riskParamSysID2' : 'riskValue',
                                'riskParamSysID3' : 'riskValue',
                                'riskParamSysID4' : 'riskValue'
                              }
        }
    */
    getProductModelRisk: function(productModelSysID, productModelJson) {
    },

    type: 'productModelCustomRiskCalculation'
};
```

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

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

8. Click **Update**.

Run scheduled job to generate risk values

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

Before you begin

Role required: admin

About this task

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

Procedure

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

   Note:

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

3. Click **Execute Now**.

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

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

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

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

   e. Click **Execute Now**.

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

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

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

The risk values are:

High

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

Medium

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

Low

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

Not Assessed

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

Result

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

What to do next

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

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

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

Install Application Portfolio Management (APM) Cloud Assessment Application

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

Before you begin

Role required: admin

Procedure

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

You can view detailed information about the application.

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

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

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

What to do next

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

Schedule a job to compute application scores

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

Before you begin

Role required: admin

About this task

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

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

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

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

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

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Procedure

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

What to do next

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

Set up domain separation for APM users

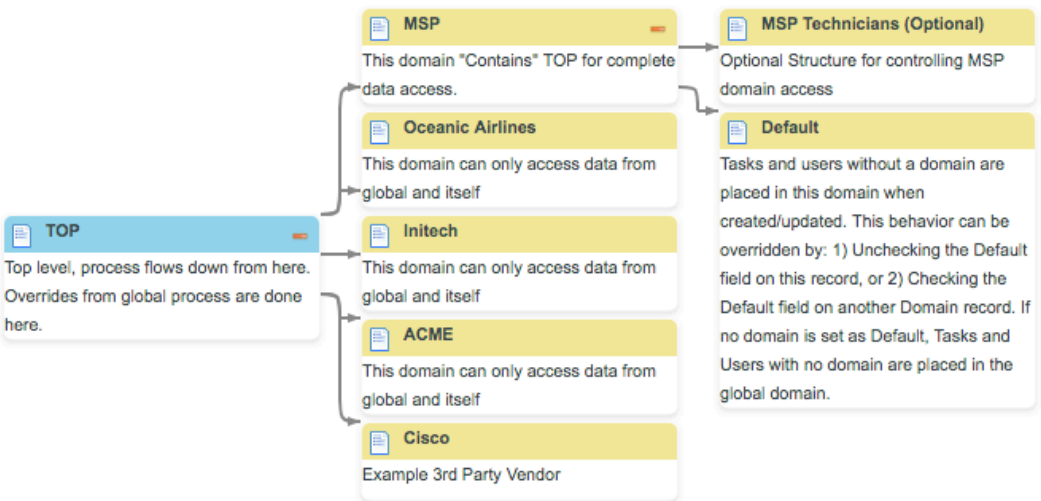
Application Portfolio Management supports domain separation for managed service providers (MSPs) to protect the sensitive data of each customer. The protection also ensures inability to view business application data of one customer by another customer and also secures the data within the domain.

Before you begin

Role required: admin

About this task

Illustration of a sample domain map



Procedure

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

   The administrator can only configure and run the scheduled jobs.

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

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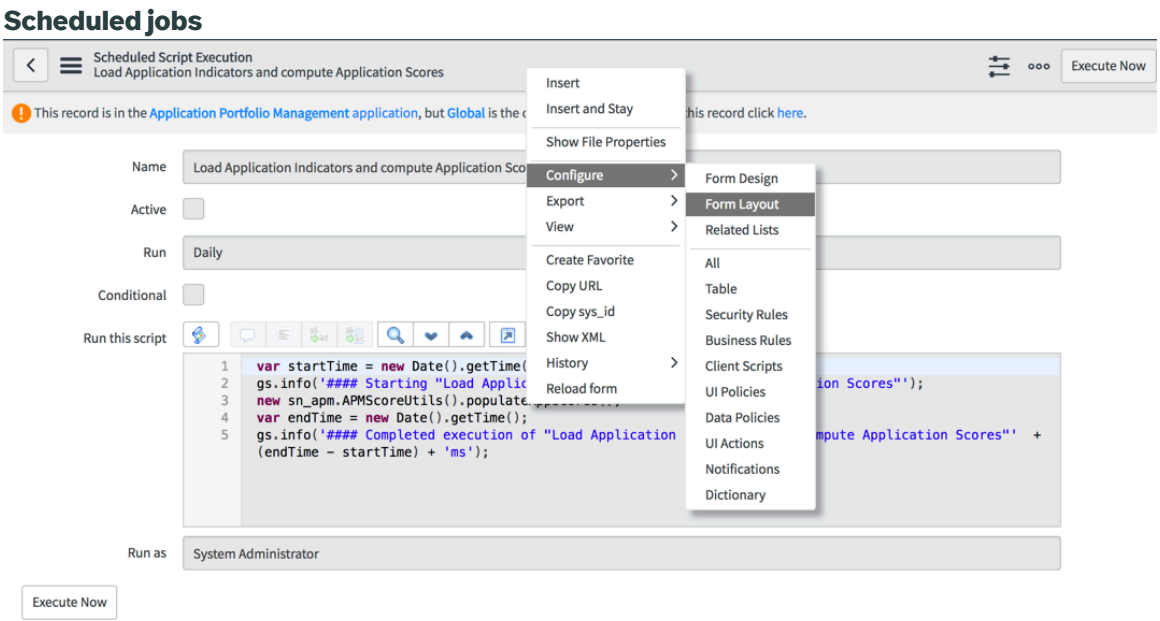
4. Create indicators at the domain level.

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

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

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



Run scheduled jobs for CMDB Query Builder reports

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

Before you begin

Role required: sys_admin

Procedure

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

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

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

- Business Capabilities provided by Business Application
- Application Services consumed by Business Application

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

Schedule a job to generate TPM lifecycle data

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

Before you begin

Role required: admin

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

Procedure

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

Result

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

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

Run a scheduled job to generate TPM lifecycle data

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

Before you begin

Role required: admin

About this task

The scheduled job *Populate TPM Discovered Technologies and Lifecycles* is created to fetch the technology lifecycle data for your technology portfolio. This job can be run on-demand to calculate the technology lifecycle risk. The scheduled job executes the script generating the lifecycle risk dates, including end of support date, end of extended support date, and end of life date for your software and hardware models.

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

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Procedure

1. Navigate to **All** > **#System Definition** > **#Scheduled Jobs**.
2. Find and open the# scheduled job*Populate TPM Discovered Technologies and Lifecycles*.
3. Select#**#Execute Now**.

Result

After executing the scheduled job, the engine automatically stores the technologies and lifecycle values in the TPM Technology Lifecycle [sn_apm_tpm_technology_lifecycle] table. It updates the values in the table each time after you run the job.

What to do next

To know the status of the scheduled job, refer to the TPM Discovered Technology Run Logs [sn_apm_tpm_discovered_technology_run_log] table. To view the technology lifecycle information, refer to the TPM Technology Lifecycle [sn_apm_tpm_technology_lifecycle] table. You can view the results in the Portfolio > Technology Portfolio Management > Logs page.

Schedule a job to generate TPM technology risk

Execute the#*Populate Technology Lifecycle Risks* scheduled job to generate the TPM technology lifecycle risks and populate the result in the TPM Technology Lifecycle Risks [sn_apm_tpm_technology_risk] table.

Before you begin

Role required: admin

About this task

The scheduled job populates the risk scores for business applications (BA), application services (AS), software products, and hardware models for a fiscal period of type month in the Technology lifecycle risks (sn_apm_tpm_technology_risk) table.

The scores of software products and hardware models are calculated based on their lifecycle dates (EOS, EOES, EOL), where 100 is the maximum score. The sum of the related software and hardware risk score is the risk score of an application service. And, the sum of the related application service risk score is considered as the risk score of a business application.

These risk scores are displayed in the risk column of a TPM Gantt chart. The same scores for a business application is served as an application weight for calculating Technology Lifecycle Risk indicator score for a fiscal period.

Procedure

1. Navigate to **All** > **System Scheduler** > **#Scheduled Jobs** > **#Scheduled Jobs**.
2. Find and select the#*Populate Technology Lifecycle Risks* scheduled job.
3. Select#**Execute Now**.

Using Application Portfolio Management

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

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Add or edit a business application

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

Before you begin

If you have an APM user role (sn_apm.apm_user), use the Business Application Life-cycle Management services to request, add, or retire a business application.

Role required: sn_apm.apm_analyst

Procedure

1. Navigate to **All** > **Application Portfolio Management** > **Application Portfolio** > **All Business Applications**.
2. Select **New** to add a new application or select the name of an existing application that you want to edit.
3. On the form, fill in the fields.
   For field information, see Business Application Form.
4. Select **Submit** or **Update**.
5. To relate a business application to an application service using the CI relationship editor, select the Add CI relationship (+) icon in the **Related Items** section.
6. To view the roadmap of the business application and its related data, select **View Application Roadmap**.
   You have to activate the PPM Standard (com.snc.financial_planning_pmo) plugin to view the business application roadmap.
7. To get all the available and significant information of a business application, select Application 360.
8. To know the application cost in the last period, manage application cost as a percentage of total spend, determine its future trend, and provide a cost-effective business application, select **Application TCO**.

   For more information, see Application TCO .

   Note:

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

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

9. To raise a demand for the business application, select **Create Demand**.
   The Demand form that opens up populates the related business application in the **Business Applications** field.
10. To retrieve software models associated to the business application, select **Manage Technology Models**.

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It also retrieves the log of software models that the software models suggestion engine retrieved when the scheduled job was last executed.

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

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

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

What to do next

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

View business application roadmap

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

Before you begin

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

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

Role required: it_project_manager and sn_apm.apm_user

About this task

The application roadmap takes you to an investment portal of the business application. The portal is exclusive to Application Portfolio Management.

Procedure

1. Navigate to the Application Roadmap using one of the following options:

   - To view the roadmap of any specific business application, navigate to **Application Portfolio Management** > **Application Portfolio** > **All Business Applications**.

     a. Click the name of the business application to open it in form view.

     b. Click the **View Application Roadmap** button to open the business application record within a portal with all its investment details.

   - To view the roadmap of the applications that you own, navigate to **Application Portfolio Management** > **Application Portfolio** > **My Applications Roadmap**.

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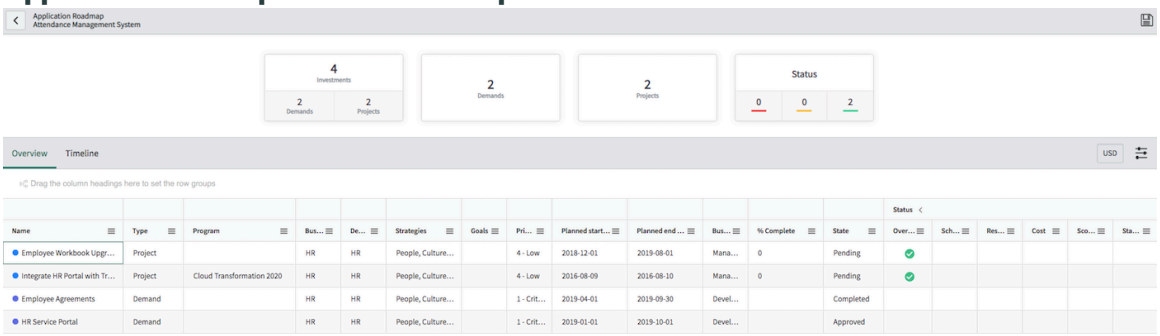
Application roadmap in an investment portal



2. Use the widgets on the top panel to view the following details:
   - The total number of investments planned on the business application, which also indicates the number of projects and demands separately.
   - The total number of projects and demands that impact the business application in the current and future fiscal years.
   - The color-coded status of the projects and demands indicating high, medium, and low risks correspond to the colors red, yellow, and green, respectively.
3. To configure the view in the portal, click the configuration widget ( ).
   a. Select the check box in the ITEM COLUMNS to add the columns that you require. Clear the check box to remove columns from the portal view.
4. To save your configurations, click the save icon ( ).
   Your preferences are set when you open the investment portal the next time to view the application roadmap. The settings are retained not only for the original business application for which you configured, but also for any other business application that you open.
5. Use the **Overview** tab to view the:
   - Names of the projects and demands the application is tied to.
   - Program that the projects and demands are part of. Projects and demands may or may not be associated to a project.
   - Business units to which the projects and demands are attached.
   - Business capabilities to which the projects and demands render support.
   - Strategies and goals of the projects and demands.
   - Planned start and completion dates.
   - Overall status of the projects and demands.
6. Use the **Timeline** tab of the portal to view the timeline in a:
   - Grid view that shows start and end dates, possible risks, and issues.
   - Gantt view that indicates the schedule of the projects and demands.

Related topics

Add or edit a business application

Monitor business applications with the application landscape dashboard

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Associate suggested technology models to an application service

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

Before you begin

Role required: sn_apm.apm_user

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

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

Procedure

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

   Note:

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

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

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

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

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The engine retrieves different application instances for that business application.

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

7. Click **OK**.

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

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

8. Check the **Status** for the selected application service.

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

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

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

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

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

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

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

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

11. Click the **Application Service Software Models** tab to view the list of software models associated to the application service.
    To delete an application service software model record, select the record to mark for deletion and click delete in the **Action on selected rows** list. To associate an application service to a software model, see Associate an application service to a software model.

12. Click the **Application Service Hardware Models** tab to view the hardware product models that are associated to the application service.
    The Application Service Hardware Models [sn_apm_tpm_app_service_hardware_model] mapping table stores the data. To associate an application service to a hardware model, see Associate an application service to hardware model.

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Assess business capability

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

Before you begin

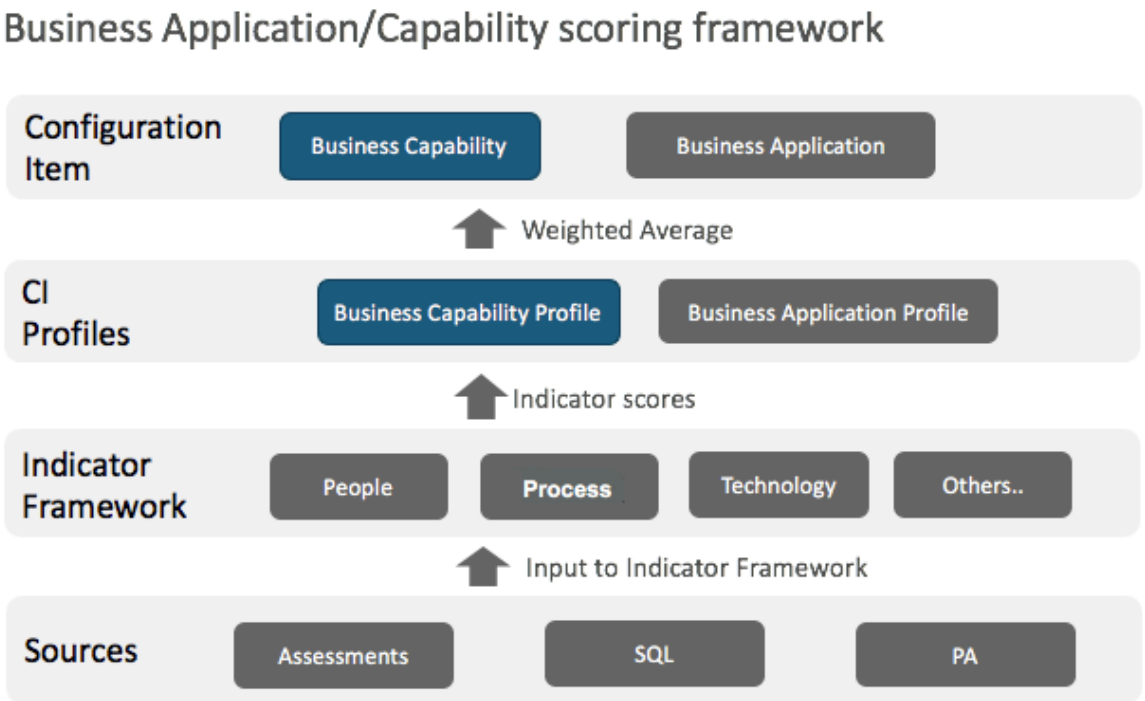
Role required: sn_apm.apm_admin

About this task

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

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

Business capability scoring framework



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

Procedure

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

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Relationship types

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

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

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

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

Create business capability and relate the capability with an application

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

Before you begin
Role required: sn_apm.apm_admin

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

Following are the conditions to update or delete a capability:

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

Procedure
1. Navigate to **All** > **Application Portfolio Management** > **Administration** > **Business Capabilities**.

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

2. Select **New**.

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

   If a root or a level-0 capability is created or if the parent field of a capability is rendered null, then a message prompts you to run the business capability update levels job to recalculate the hierarchy IDs.
5. To make the **Hierarchy ID** field editable, navigate to **System Properties** > **All Properties**.

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

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

   c. Select **Update**.

   Note:
   Since the hierarchy ID is customized, the system doesn't check for any conflicts in the number or value that you set.
6. To create child capabilities for the capability that you created, open the record and select **New** button in the **Capabilities** related list of the Business Capability form.
7. In the related links, select **Update Capability Level and HierarchyID** to update the levels in the hierarchy.
   Selecting the **Update Capability Level and HierarchyID** link executes the **Update Capability Level and HierarchyID** scheduled script. You can view the updated hierarchy in the capability map.

   If you had navigated to the Capability Hierarchy Map after updating the parent, order, or hierarchy ID but without running the update capability levels job, then a message prompts you to run the Update Capability Levels job and relaunch the page to render the capability hierarchy map with the latest change.
8. To relate the capability with an application, select open the business capability.
9. In the Related Items section of the business capability form, select the Add CI relationship (+) icon to launch the relationship editor and create the CI relationship.
10. Select the **Provided by (Parent)** from the Suggested relationship types section.
    The filter is automatically applied on the business application.
11. In the Configuration Items section, select the relevant business application.
12. In the Relationships section, select the CI relationship icon + to create a new relationship with selected configuration items.

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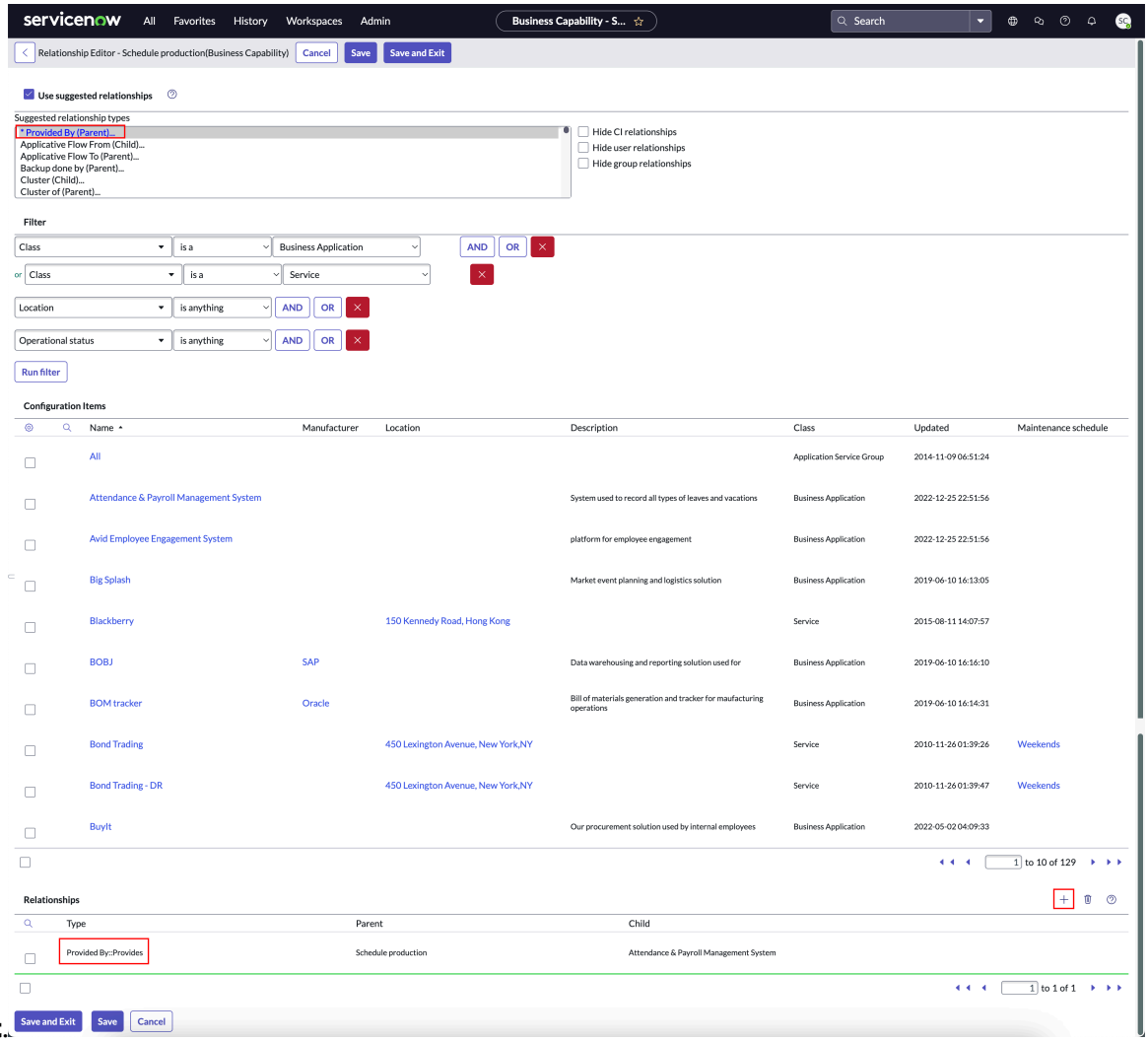
The Provided by::Provides relationship is added in the Relationships section.

13. Select **Save and**



Exit.

What to do next

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

Use capability map for planning

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

Before you begin

Role required: sn_apm.apm_analyst

About this task

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

The capabilities are color coded which enables you to identify, in a glimpse, those capabilities that have major, medium, and minor gaps. Since you have visibility of the business applications

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that support the capabilities, you can create goals, demands, or programs to improve the performance of the applications.

Procedure

1. Navigate to **All** > **Application Portfolio Management** > **Capability Ratings** > **Capability Map**.

   The left pane lists all parent capabilities in the hierarchy. By default, the first business capability in the hierarchy at level 0 expands to display its immediate child capabilities at level

   1. For subsequent business capabilities and child capabilities, click the icon to expand and view its sub-capabilities at each level. This view is similar across Business Capability, Technology Risk, and also in Manage Capability Hierarchy views.

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

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

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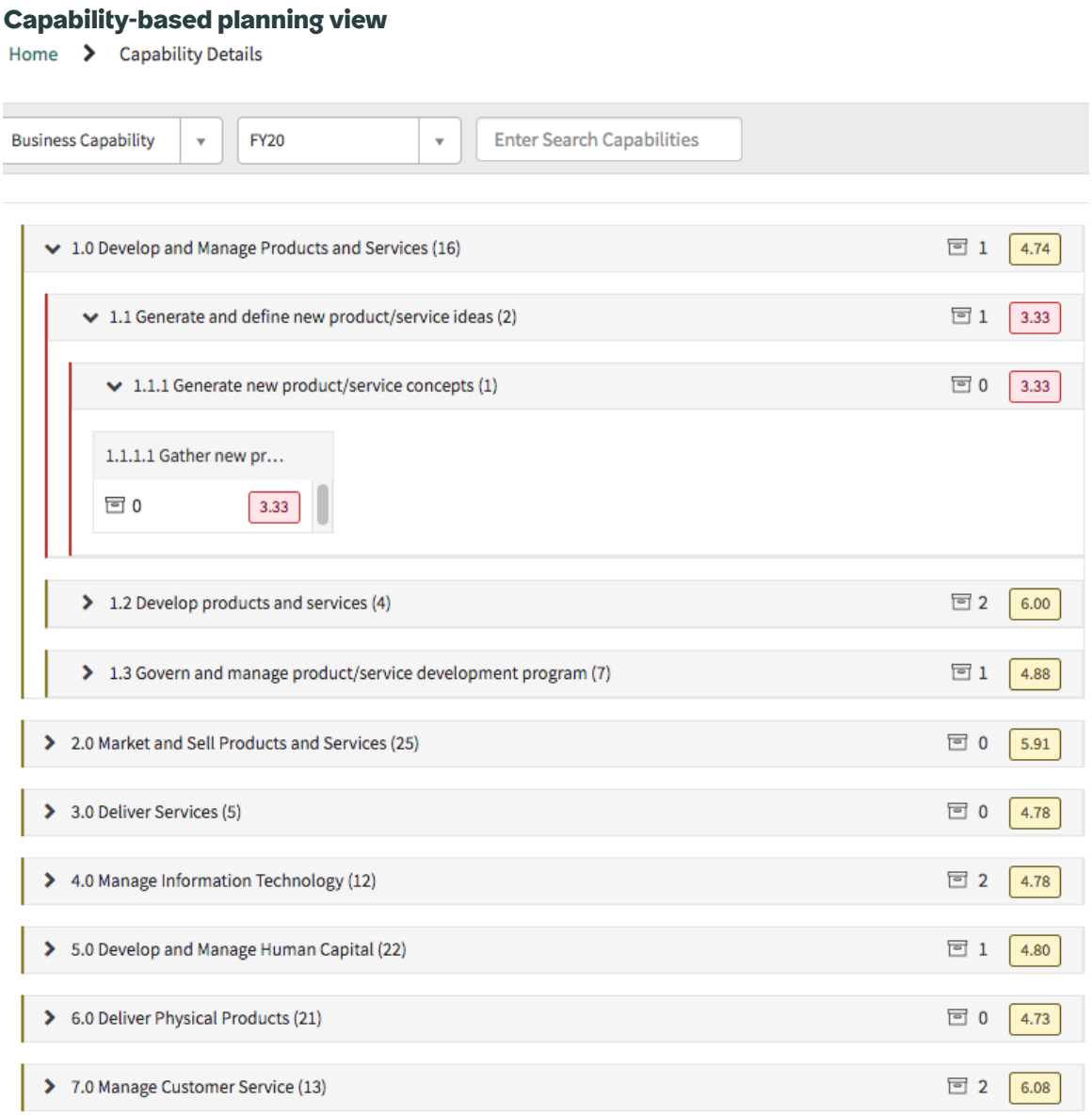

Capabilities

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

Leaf Capabilities

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

Assessed

Total number of assessed business capabilities.

Not Assessed

Total number of capabilities that have not been assessed.

Major Gap

Total number of capabilities whose score fall within the range of 1-4.

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

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Medium Gap

Total number of capabilities whose score fall within the range of 4-7.

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

No Gap

Total number of capabilities whose score fall within the range of 7-10.

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

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

     With this view, you have the following search option:

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

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

     Enter Search Capabilities

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

     Legend ( )

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

     Create

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

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

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

     Manage Capability Hierarchy

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

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

View business capability details in capability map

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

Before you begin

Role required: sn_apm.apm_analyst

Procedure

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

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

Number of sub-capabilities

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

Number of applications linked to the capability

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

Capability score

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

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

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

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

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

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

Capability levels and assessment

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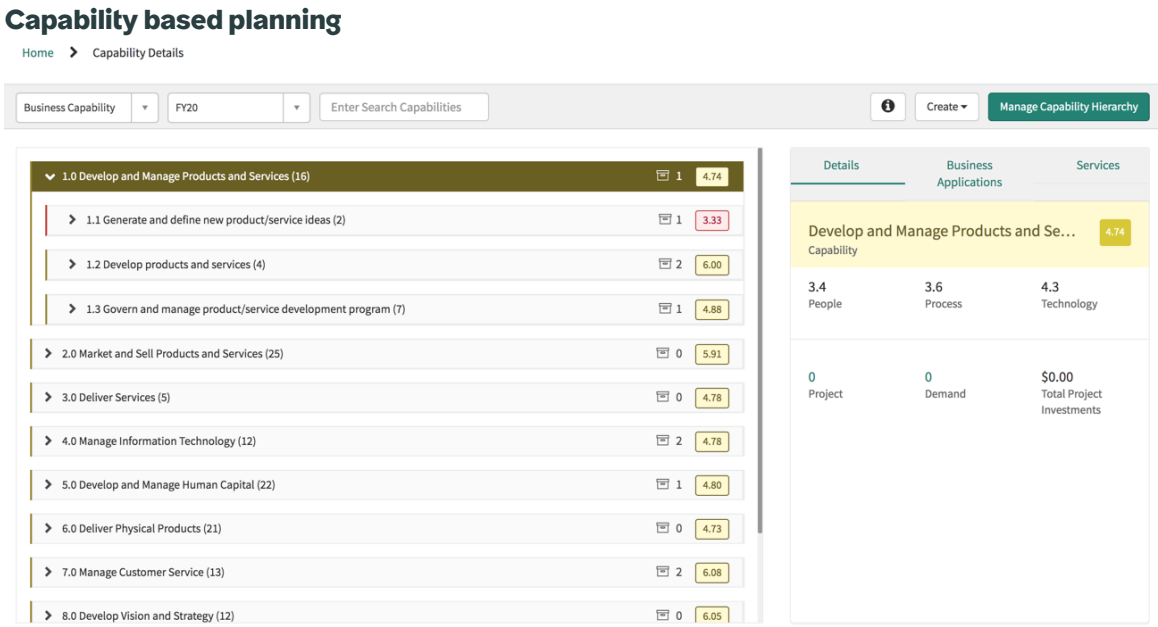
The map displays capabilities up to six levels. The capability that is at the lowest level or the capability that does not have a child is called the **leaf** level. Only the leaf level capabilities are assessed on the dimensions of people, process, and technology. The capability in the hierarchy that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

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

Details

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



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

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

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

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

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

- **Demand**: Displays the total number of demands created for the selected business capability. The demand created for a sub-capability rolls up to its parent. Like manner, the demands attached to all the sub-capabilities in a hierarchy rolls up to its root, level 0, capability in the hierarchy.

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

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

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

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

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

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

Business Applications

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

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

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

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

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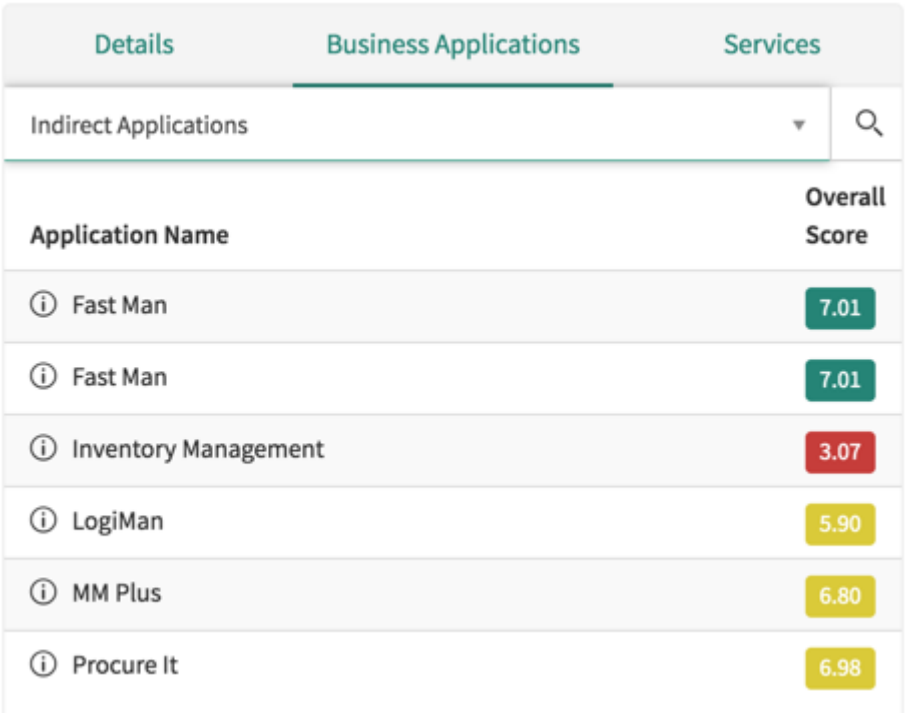
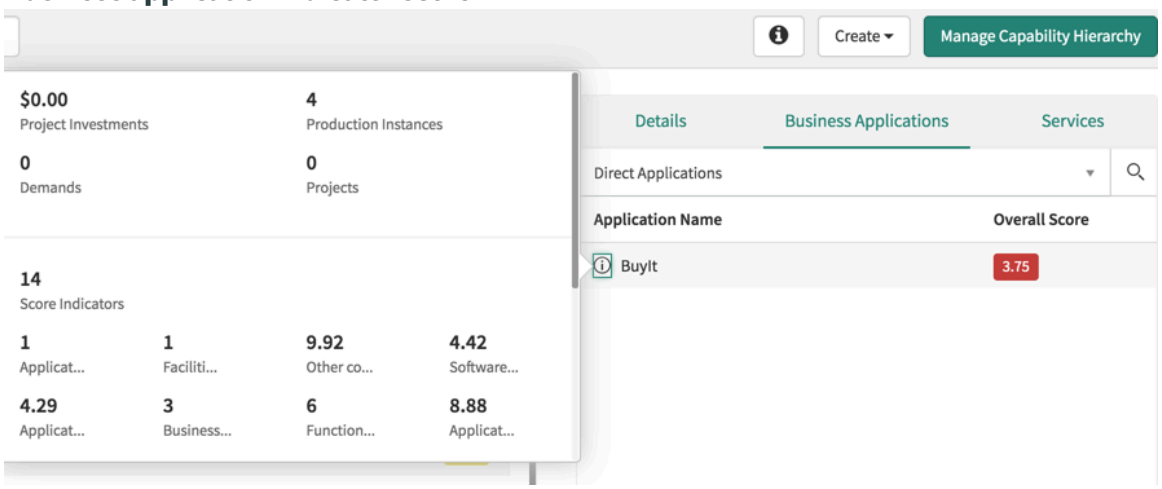
Business application overall score view



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

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

Business application indicator score



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

  If a project impacts one or more business applications, then the **Total planned cost** of the cost plans attached to the project is split equally among the business applications. For example, if $100 is invested on project P1, which impacts business applications, BA1 and BA2, then the invested amount of $100

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is split equally as $50 each between BA1 and BA2, respectively. Similarly, you can invest in one or more projects that can be tied to one business application (BA1). The invested amount is split equally among the applications tied to each of these projects. The resultant consolidated amount from different projects is the project investment of the business application (BA1).

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

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

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

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

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

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

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

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

Services

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

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

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What to do next
View technology risk details in capability map

Related topics
Create business capability and relate the capability with an application

View technology risk details in capability map

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

Before you begin
Role required: sn_apm.apm_analyst

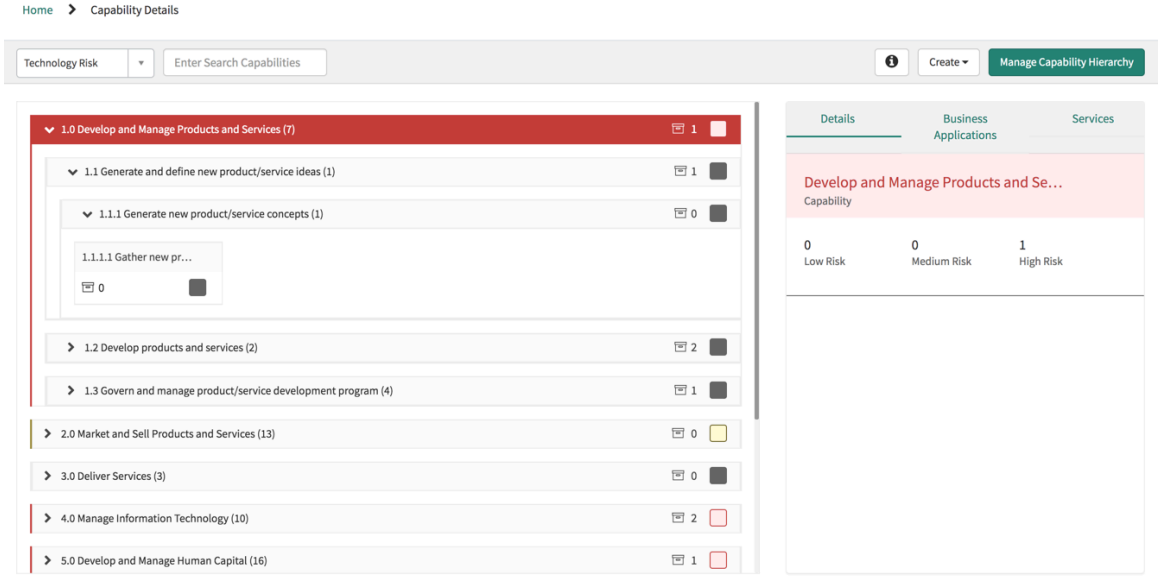
About this task
Enabling the **Technology Risk** view displays the number of underlying technologies of the selected business capability that are at low, medium, and high risks.

Procedure
1. Navigate to **All** > **Application Portfolio Management** > **Capability Ratings** > **Capability Map**.
2. Select the **Technology Risk** view.

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

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

Technology risk profile of a business capability



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

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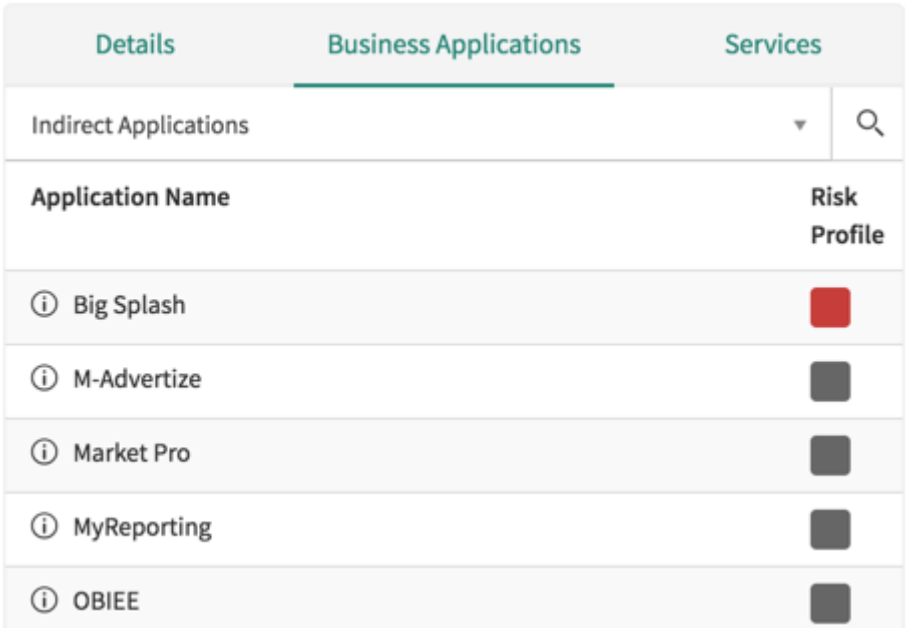
Business application risk profile



- Click the information icon (ⓘ) of an application to view the number of capabilities the business application supports and the names of the capabilities.
- To view the application record details, click the business application hypertext and navigate to the Business Application form.
- Click the view list of related technologies icon (■) to navigate to the Technology Portfolio Management timeline view to view the risk profile of the business application. Filter the applications to take an active measure on the underlying technologies that are at risk.

Services

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

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

Manage capability hierarchy in the capability map

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

Before you begin

Role required: sn_apm.apm_user

About this task

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

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executed to update the order and hierarchy of the capabilities in the map. Updating your business capabilities in the capability map saves your time and gives quick access to the updated data in the map.

Procedure

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

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

8. Click **Submit**.
9. To edit a capability, click the icon adjacent to the root-level business capability.
10. Click the **Edit Capability** button and fill in the Edit Business Capability form fields.

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

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

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

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

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

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14. Click **Delete**.

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

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

View technology risks in timeline

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

Before you begin

To view your data in the TPM timeline view:

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

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

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

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

Role required: sn_apm.apm_user

Procedure

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

   See views in TPM timeline.

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

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

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

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

Showing all lifecycle data sources helps in displaying all the publisher data sources for the product model as separate timelines instead of one with the least sequence number. The life-cycle information for each of the sources, whether internal or external, are shown separately. In the presence of more than one external publisher source, the sources displayed are in alphabetical order. As the life-cycle phase information is not merged or collated, the phase details for each source are comprehensible on the timeline.

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

   Note:

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

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

   See Perform application-related tasks from timeline.

   Note:

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

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

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

Risk information is retrieved from the business application risk table.

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

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

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

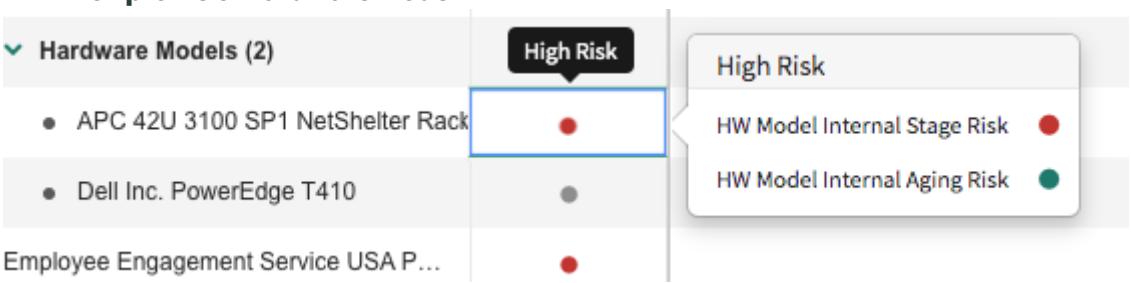
10. Click the risk bubble of a software model to view the scores at the risk parameter level.

TPM risk profile of software model

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

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

TPM risk profile of hardware model



12. Use the pagination option to populate the first 15 business applications, along with their related application services and software models.
As a maintenance user, you can configure it to load up to 20 or 25 business applications in the Application column.

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a. Navigate to **System Properties** > **All Properties**.

b. Click *sn_apm.noOfBusinessAppsPerTPMPage* to update the value.

c. Click **Update**.

13. Click the life-cycle phase icon ( ) on the hardware or software timeline to view the life-cycle information of the hardware or software model in a pop-up.

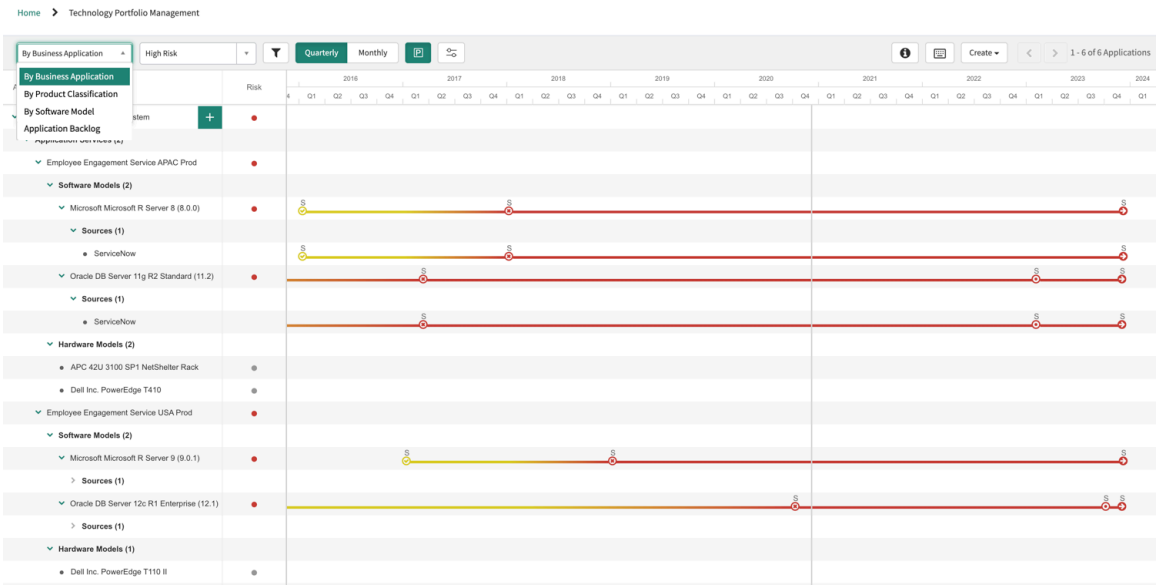
    The vertical line on the timeline indicates the current quarter that you are in. See Software product lifecycle data on the timeline.

Multiple views in TPM

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

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

Technology Portfolio Management timeline view



By Business Application view

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

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

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

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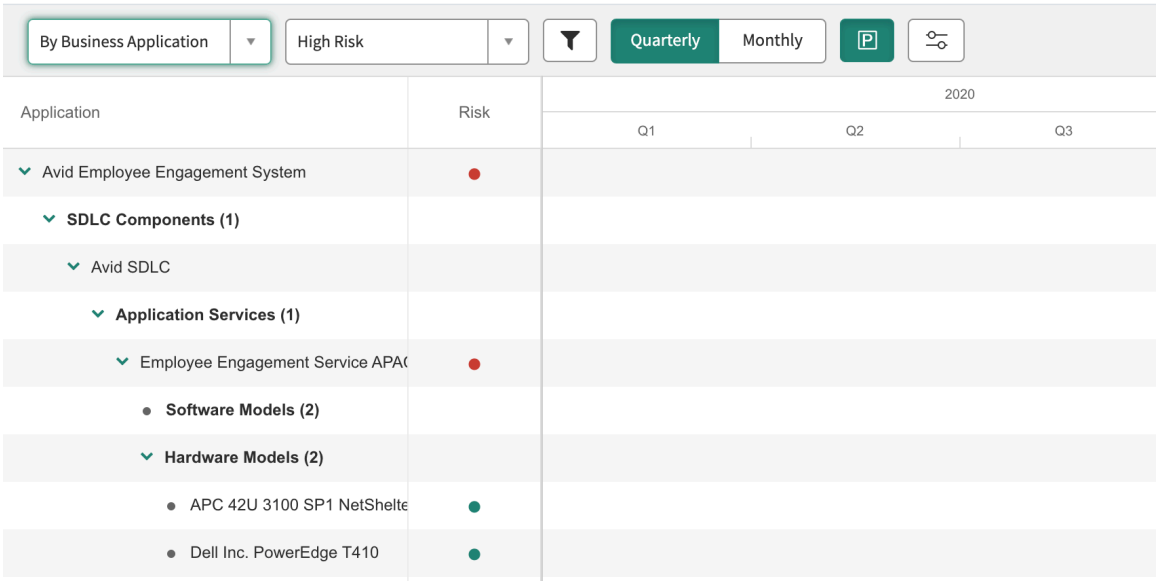
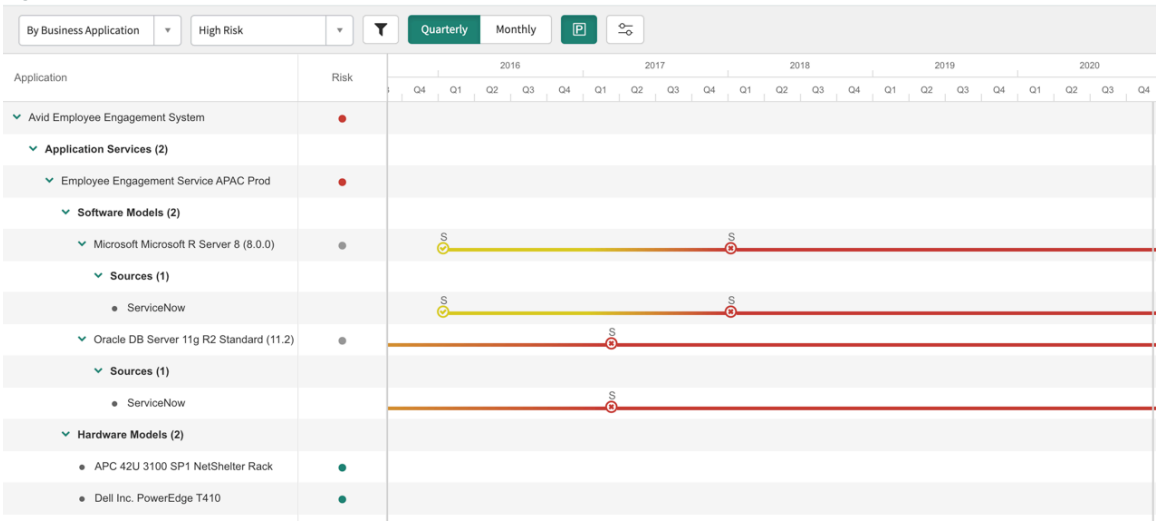
By Business Application view (with the implementation of CSDM v4.0)



By Business Application view (without implementation of CSDM v4.0)



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

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

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

By Product Classification view

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

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

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

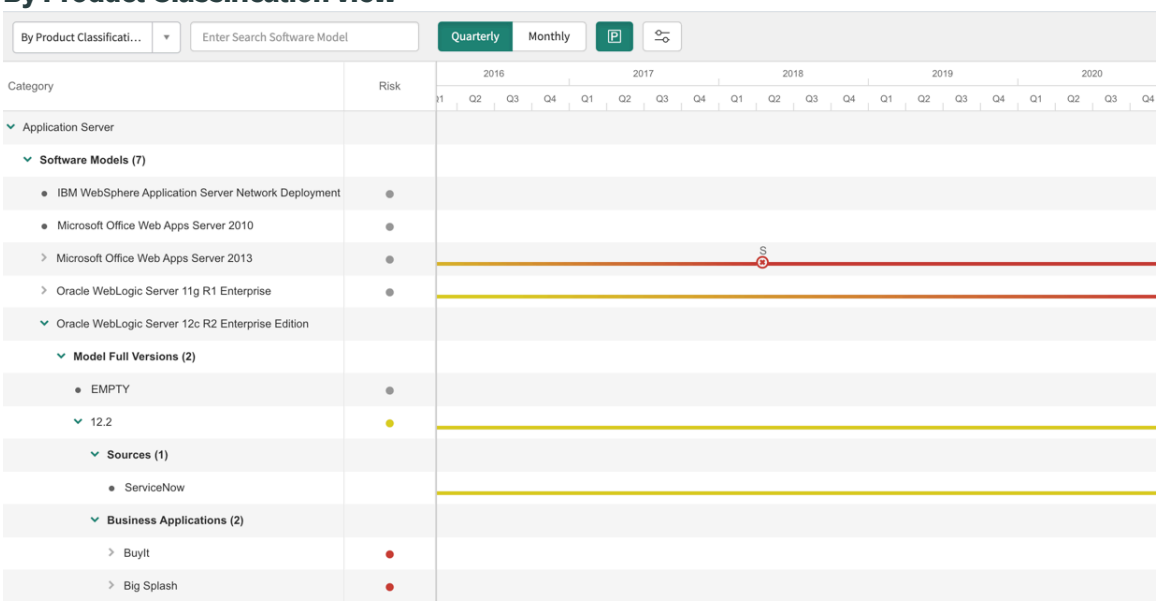
You can select this view to dynamically load all technology categories. Expand a technology category to load all the software models associated to the category. Similarly, expand a software model to view its full versions, expand a version to view its associated business applications, and expand a business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

Note:

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

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

By Product Classification view



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

By Software Model view

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

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

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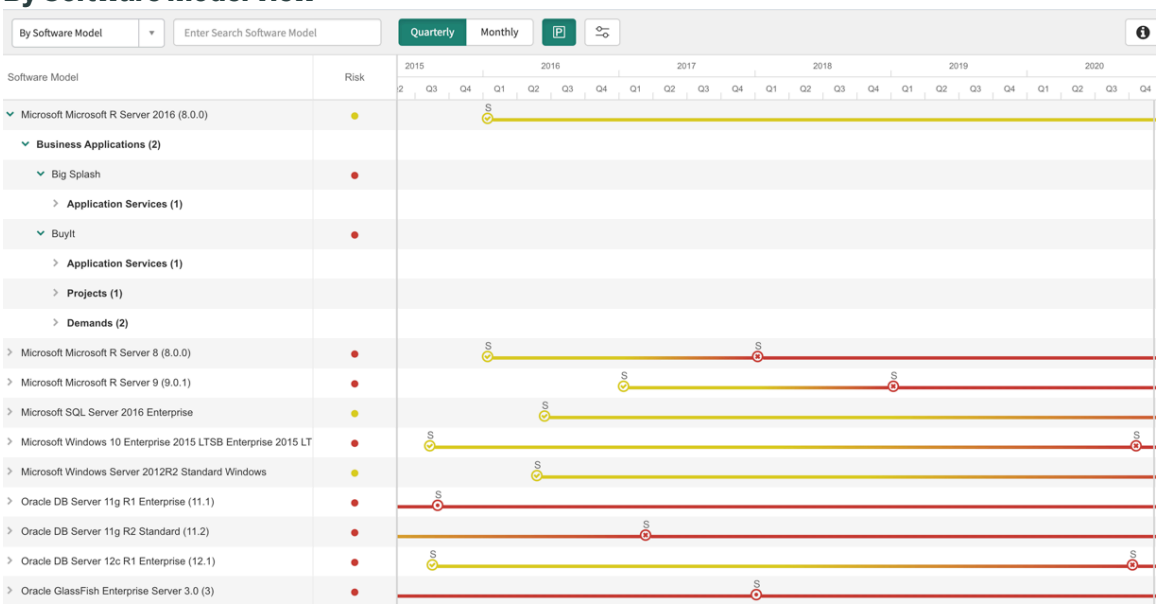
that software model. On further expansion of the business application, you can view all the application services that the business applications support.

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

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

By Software Model view



You can also do the following:

- Search the software models.
- Set conditions to filter the software models.
- Display a selected number of software model records using the incremental pagination option.
- Add a demand or project to the software model. Point to the software model and click the icon that appears next to the software model name. The demand or the project form that opens has the names of the business applications that run on the selected software model, populated in the **Business Application** field.

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

Application Backlog view

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

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

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

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

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

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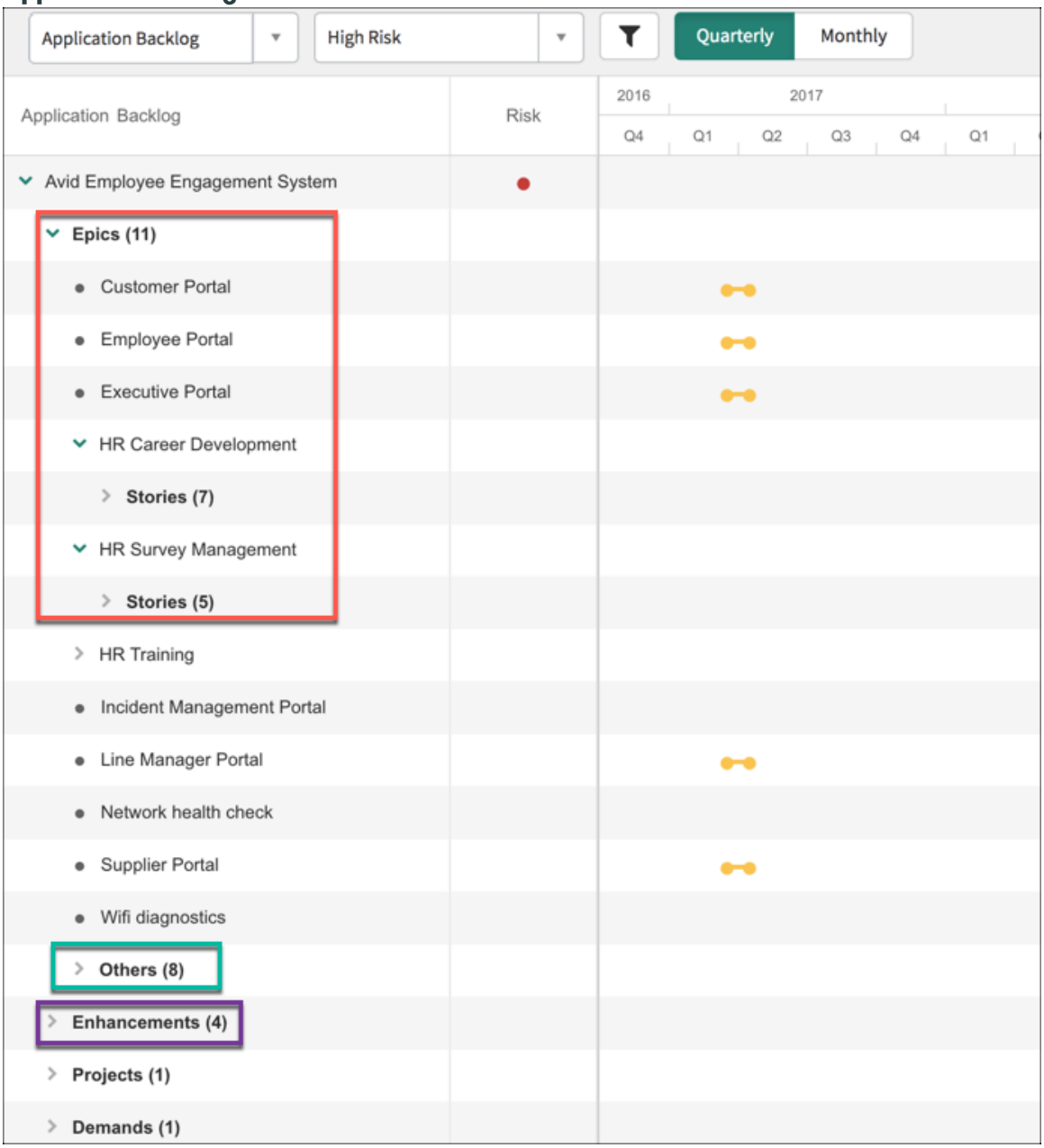
Application Backlog view of the timeline



Epics

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

Stories

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

Others

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

Enhancements

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

Projects

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

Demands

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

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

Application column

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

Risk column

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

Timeline column

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

Associate epic to business application for Application Backlog view

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

Before you begin

Role required: admin, scrum_user, or scrum_admin

Procedure

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

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6. Click the **Save** icon.

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

By SDLC Component view

The By SDLC Component view displays the#**SDLC Components** > **Application Services** > **Hardware Models** and#**Software Models** structure in a succession. Also, the business applications are shown with the same indentation level of application services in the Business Application section.

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

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

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

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

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

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

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

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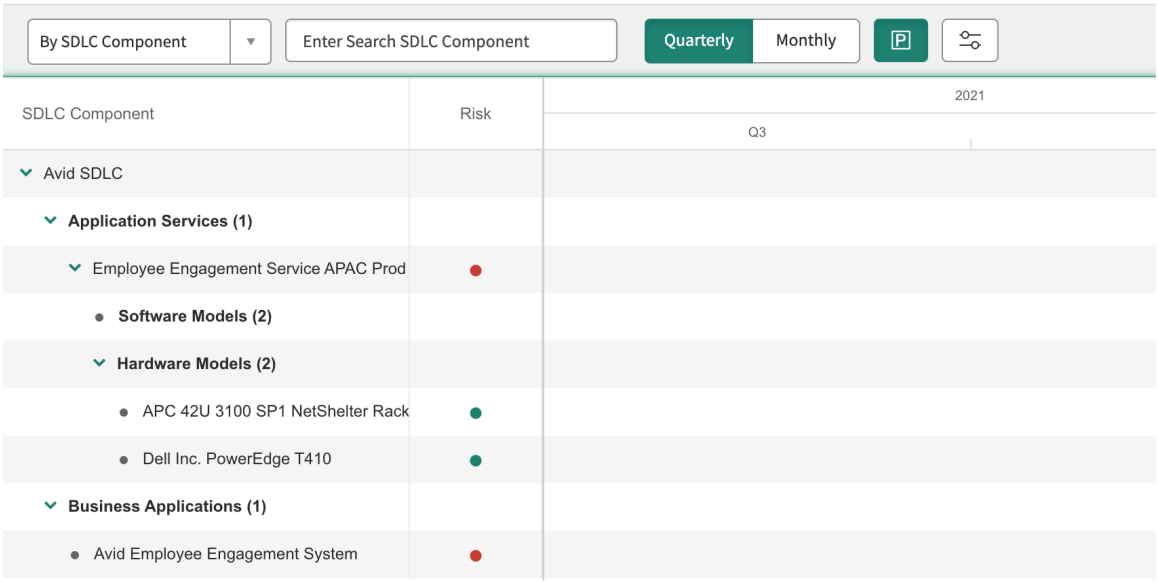
By SDLC Component view



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

Use timeline to execute your application strategy

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

Before you begin

Role required: sn_apm.apm_user

About this task

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

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

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

Procedure

1. To navigate to the Business Application form and view the record details and update, click the business application label.
2. To navigate to the Application Service form and update the record details, click the application service label.
3. To navigate to the Software Model form directly from the TPM timeline, click the software model label.
   You can modify the lifecycle details of the software product (product models of each full version) in the form.

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4. To navigate to the Hardware form and to add or update the hardware lifecycle details in the Hardware Model Lifecycles related list, click the hardware label.
5. To add a demand or project to a particular business application (in the By Business Application view) or to a software model (in the By Software Model view), point to the application or the software model and click the add new project or demand icon ( ) that appears next to the application or software model name.

Note:

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

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

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

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

a. Navigate to **Application Portfolio Management** > **Application Portfolio Analysis** > **Demands**.
b. Click open the demand.
c. Select the business application in the **Business Applications** choice list of the Demand form to which you want the demand to be added.
d. **Save** or **Update** the record.
e. Navigate to **Application Portfolio Management** > **Technology Portfolio Management (TPM)** > **Technology Lifecycles** and refresh the timeline view of the TPM page.

You can view the number of demands that are added to the business application. Click the arrow to expand and view the demand names.

Note:
The start and end date of the demand that is attached to a business application is plotted on the demand timeline. If only one date of the demand is present, either the start or end date, then that date is plotted as a point.

Relate business application to application service using CI relationship editor

Business applications can have multiple instances. Application instances are nothing but application services. Relate business applications to instances by relating business applications to application services. Business application and application service are two different configuration items which must be related through a CI relationship.

Before you begin

Role required: sn_apm.apm_user

Procedure

1. Navigate to **All** > **Application Portfolio Management** > **All Business Applications** > **Business Applications**.
2. To relate the business application with an application service, click open a business application.

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3. Click the Add CI relationship (+) icon in the **Related Items** section of the business application form to launch the relationship editor and create the CI relationship.
4. Select one or more application services from the **Configuration Items** section.

   Integration with Service Mapping is through the CI relationship editor creating direct relationship between the configuration items.

5. Click the (+) icon in the **Relationships** section.
   By default **Consumes::Consumed by** relationship type is selected.

   You can relate two configuration items using the suggested relationship type of CMDB. It not only selects the relationship type automatically but also ensures consistency in the relationship. The suggested relationship is established between capability and application AND between application and service.

6. Click **Save and Exit**.

What to do next
You have created a relationship between a business application and an application service, you can now associate the application service to a software model.

Associate an application service to hardware model

Track your equipment assets such as computers and servers using hardware models.

Before you begin
Role required: sn_apm.apm_user

About this task
Hardware models are configuration items with specifications for a given device model. Specifications can be size, depth, image, model, and power of the device.

> **Note:**
> In Application Portfolio Management, only computers and servers are tracked as hardware or hardware models. Other types of hardware such as printers, network gear, peripherals, or UPS are not tracked for an application service.

Your business applications may run on multiple application services, which in turn can be installed on different types of hardware. Therefore associating application services with hardware models helps to know the risk on the Application Service due to underlying hardware.

When you run the Fetch Product Models job, the application service is automatically associated with a hardware model. The application service and the hardware product model are mapped and a record is created in the Application Service Hardware Models [sn_apm_tpm_app_service_hardware_model] table. However, you can also manually associate an application service to all hardware models, including the hardware.

After the Load TPM Risk Parameters and compute Application Service Risks scheduled job is executed, the technology risk data of the hardware model are generated and stored in Hardware Model Risks [sn_apm_tpm_hardware_model_risk] table.

> **Note:**
> As an APM user, your access to the hardware product model risk table is limited to read-only. However, if you are an APM administrator you can create, modify, and delete the hardware model risks in the table. Access is also read-only to Hardware [cmdb_ci_hardware], Hardware Model [cmdb_hardware_product_model], and Hardware Model Lifecycle [cmdb_hardware_model_lifecycle] tables.

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Procedure

1. Navigate to **All** > **Application Portfolio Management** > **Technology Portfolio Management (TPM)** > **Application Services**.
2. Click the service record, which is the application service, to which you want to associate a hardware model.
3. Click the **Application Service Hardware Models** related list.
4. Click **New**.

   The Application service hardware models database table stores the application service hardware model information. You can also navigate directly to the Application Service Hardware Models table from the application navigator.

5. On the form, fill in the fields.
   For field information, see Application Service Hardware Models form.
6. Click **Submit**.

Associate an application service to a software model

Business applications have multiple instances such as development, QA, and production. Instances are nothing but application services. Application services must be associated with software models (to the respective full versions) to know the risk of the application service.

Before you begin

Role required: sn_apm.apm_user

Procedure

1. Navigate to **All** > **Application Portfolio Management** > **Technology Portfolio Management (TPM)** > **Application Services**.
2. Select the service record, which is the application service, to which you want to associate the software models.
3. Select the **Application Service Software Models** related list.
4. Select **New**.

   The Application Service Software Models [sn_apm_tpm_service_software_model] database table stores the application service software model information. You can also navigate directly to the Application Service Software Models table from the application navigator. Data from this table is rendered as the software model timeline in the By Software Model view of the TPM screen.

5. On the form, fill in the fields.
   For field information, see Application Service Software Model form.
6. Select **Submit**.

What to do next

Create risk parameter scores to evaluate the risk of the software model. Based on the risk of the software model you can calculate the risk of the application service. Finally, based on the risk of the application service you can evaluate the risk of the business application.

Create a risk parameter

The risk on a software model is calculated based on four preconfigured parameters such as external aging risk, internal aging risk, external stage risk, and internal stage risk.

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Before you begin
Role required: sn_apm.apm_admin

About this task
In addition to the preconfigured parameters, you can also create risk parameters as per your business application requirements and the software models that it is based on. However, if you create a parameter, then you must also write a script with the logic to calculate that parameter risk.

Procedure
1. Navigate to **All** > **Application Portfolio Management** > **Administration** > **TPM Risk Parameters**.
2. Click **New** or open a record.
3. Fill in the form fields.
   For field information, see Risk Parameter form.
4. Click **Submit** or **Update**.

What to do next
After creating the risk parameters run the TPM risk engine to load the risk parameters and compute the application service risks.

Create or edit an architectural artifact

Create or edit an architectural artifact to align it with your business requirements.

Before you begin
Role required: sn_apm.apm_user

Procedure
1. Navigate to **All** > **Application Portfolio Management** > **#Architectural Artifacts** > **Artifacts**.
2. Create or edit an artifact.
   - To create an artifact, click **New**.
   - To edit an existing artifact, click the name of that artifact.
3. On the form, fill in the fields.
   For field information, see Architectural artifact form.
4. Click **Submit** or **Update**.

Associate an artifact to a business entity

Associate an architectural artifact to existing elements in the ServiceNow AI Platform, such as business capabilities or business applications. The association creates a relationship between the artifact and related entities.

Before you begin
Role required: sn_apm.apm_user

Procedure
1. Navigate to **All** > **Application Portfolio Management** > **#Architectural Artifacts** > **Artifacts**.
2. Click the name of the artifact for which you want to add a related entity.
3. In the displayed details form, click the#**Related Entities** tab.

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4. Click **New**.
5. On the form, fill in the fields.
   For field information, see Related Entities form.
6. Click **Submit**.

Manage the artifacts of a business capability

View and manage the artifacts that are associated with a business capability.

Before you begin
Role required: sn_apm.apm_analyst

Procedure

1. Navigate to **All** > **Application Portfolio Management** > **Administration** > **Business Capabilities**.
2. Click the name of the business capability to view the associated artifacts.
3. In the Related Links section, select the **Architectural Artifacts** tab.
   A list of artifacts associated with the business capability is displayed.
4. Create or edit an existing artifact.
   - To create an artifact, click **New**.
   - To edit an existing artifact, click **Edit**.

   You can also download or remove the selected artifact as per your requirement.

Manage the artifacts of a business application

View and manage the artifacts that are associated with a business application.

Before you begin
Role required: sn_apm.apm_analyst

Procedure

1. Navigate to **All** > **Application Portfolio Management** > **Application Portfolio** > **All Business Applications**.
2. Click the name of the business application to view the associated artifacts.
3. In the Related Links section, select the **Architectural Artifacts** tab.
   A list of artifacts associated with the business application is displayed.
4. Create or edit an artifact.
   - To create an artifact, click **New**.
   - To edit an existing artifact, click **Edit**.

   You can also download or remove the selected artifact as per your requirement.

Create or edit an artifact category

Create#or edit an artifact category. Assign the category to an architectural artifact. Categories enable you to categorize and manage artifacts more efficiently.

Before you begin
Role required: sn_apm.apm_user

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Procedure

1. Navigate to **All** > **Application Portfolio Management** > **#Architectural Artifacts** > **Categories**.
2. Create or edit an architectural category.
   - To create a new architectural category, click#**New**.
   - To modify an existing category, click the name of the category.
3. On the form, fill in the fields.
   For field information, see Architectural category form.
4. Click **Submit** or **Update**.

Create an artifact version

Create multiple versions of the architectural artifacts and send for approval. There can be only one approved version for each artifact.

Before you begin

Role required: sn_apm.apm_user

Procedure

1. Navigate to **All** > **Application Portfolio Management** > **#Architectural Artifacts** > **Artifacts**.
2. Select an architectural artifact for which you want to create an artifact version.
3. Select the **Architectural Artifacts Versions** tab.
4. Click **New**.
5. On the form, fill in the fields.
   For field information, see Architectural artifacts version form.
6. Click **Submit**.

Download an artifact version

Download an approved artifact version to view the architectural diagram in it.

Before you begin

Role required: sn_apm.apm_user

Procedure

1. Navigate to **All** > **Architectural Artifacts** > **Versions**.
2. Select the architectural artifact version that you want to download.
3. Click **Download Artifact**.

> **Note:**
> You cannot download an unapproved artifact version or an artifact version that is a URL. If you try to download these, you get an error message.

Result

An approved version of the document is downloaded.

Request approval for an artifact version

Send an architectural artifact version for approval to an Enterprise Architect user. The user reviews and approves the request.

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Before you begin
Role required: sn_apm.apm_user

Procedure

1. Navigate to **All** > **#Architectural Artifacts** > **Artifacts**.
2. Select the architectural artifact for which you want to send the artifact version for approval.
3. Select the **Architectural Artifacts Versions** tab.
4. Click the version number of the record to open it.
5. Select **Request Approval**.

Result
The record version is submitted for the approval to an Enterprise Architect. An email notification is sent to the approver.

Approve or reject an artifact version request

As an Enterprise Architect, create, edit, and approve or reject architectural artifacts version requests that are submitted by other users.

Before you begin
Role required: sn_apm.apm_analyst

About this task
When a user requests an artifact, an email notification is received by the approver.

Procedure

1. Navigate to **All** > **Service Desk** > **My Approvals**.
2. Select the artifact request that you want approve or reject.
3. Select **Approve** or **Reject**.

Result
The requester receives an email notification for the approval or rejection.

Approve architecture review requests

You can approve an architecture review request if you are part of the Enterprise Architect Group.

Before you begin
Role required: sn_apm.apm_analyst

About this task
An approver in the group need not necessarily be an APM user nor have an APM role. However, the approver must be a user listed in the user table [sys_user]. Any approver from the Enterprise Architect Group can approve the architecture review request.

To add or modify the members in the group, navigate to **Application Portfolio Management** > **Administration** > **Services Approval Group**.

Procedure

1. Navigate to **Application Portfolio Management** > **Business Application Lifecycle Management** > **Service Requests**.
2. Click the task number.

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3. Scroll down to the Approvers related list and click the state of the approval.
4. Select **Approved** or **Rejected** in the **State** field.
5. Click **Update**.

   The requester receives an email notification once you approve or reject an ARB request. An automated flow designer process is also created. You can navigate to **Application Portfolio Management** > **Administration** > **Services Flow Designer** to see the flow.

Create a diagram for a business application

Create a diagram in for your business application hierarchy and associate it with an architectural artifact. Use the ServiceNow Enterprise Modeling and Visualization or Lucidchart to create a diagram for your business hierarchy.

Before you begin

For creating the diagram using the ServiceNow Enterprise Modeling and Visualization, you must activate the following ServiceNow Store applications. For more information, see Enterprise Modeling and Visualization in the EA Workspace.

- Enterprise Modeling and Visualization (app-modelling-tool)
- Diagram Builder (app-diagram-builder)
- APM Modelling tool Common (app-modelling-tool-common)

For creating the diagram using the Lucidchart, you must activate the following ServiceNow Store applications and establish a connection with Lucid:

- Lucidchart Diagramming Spoke
- Lucidchart Integration

To establish a connection with Lucid, see Create OAuth 2.0 Client in Lucidchart and Create a connection and credential alias for the Lucidchart diagramming spoke.

Role required: Member of the Enterprise Architect group

Procedure

1. Navigate to the Business Application diagrams.
   - Navigate to **All** > **Application Portfolio Management** > **#Architectural Artifacts** > **#Diagrams**.
   - Navigate to **All** > **Application Portfolio Management** > **Application Portfolio** > **All Business Applications** and select a Business Application.
2. Click **Create Diagram**.
3. On the form, fill in the fields.
   For field information, see Create diagram form for business application.

   Note:
   For Lucidchart, use the authorization link on the Create Diagram window, to generate an authentication token and fetch your Lucid folders to save the diagram.

4. Click **Create Diagram**.

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Result

After a successful submission, a link to the newly created diagram appears on top of the screen. You can select the link to navigate to the diagram. The Architectural Artifacts page shows the link to the diagram and an artifact name associated with it. You can select the respective link to access the artifact or diagram.

Create a Lucid diagram for a business capability

Create a diagram in Lucidchart for your business capability maps and associate it with an architectural artifact.

Before you begin

Install the following store apps:

- Lucidchart Diagramming Spoke
- Lucidchart Integration

Ensure a connection is established with Lucid. For details, see Create OAuth 2.0 Client in Lucidchart and Create a connection and credential alias for the Lucidchart diagramming spoke.

Role required: Member of the Enterprise Architect group

Procedure

1. Navigate to the Business Capabilities diagrams in one of the following ways:
   - Navigate to **All** > **Application Portfolio Management** > **#Architectural Artifacts** > **#Diagrams**.
   - Navigate to **All** > **Organization** > **Business Capabilities** and select a Business Capability.
2. Click **Create Diagram**.
3. On the form, fill in the fields.

   Note:
   Use the authorization link on the Create Diagram window, to generate an authentication token and fetch your Lucid folders to save the diagram.

   For field information, see Create diagram for a business capability.
4. Click **Create Diagram**.

Result

After a successful submission, a link to the newly created Lucid diagram appears on top of the screen. You can select the link to navigate to the diagram. The Architectural Artifacts page shows the link to the Lucidchart diagram and an artifact name associated with it. You can select the respective link to access the artifact or diagram.

Use Business Application Lifecycle Management to request or retire an application

If you are an APM user, you should use the Business Application Lifecycle Management services to request or register a new business application for your business. You can request a business application like you place an order for any other service catalog item.

Before you begin

Role required: sn_apm.apm_user

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About this task

The base system also offers **Register a Business Application** as a service to all ServiceNow AI Platform customers. The Application Portfolio Management Core plugin (com.snc.apm_core) provides this service and the plugin is available on new and restarted instances. Customers who do not have the Application Portfolio Management application can avail this service to request a new business application. However, activating the Application Portfolio Management plugin (com.snc.apm) enhances this service to predict and set application category using the machine-learning solution.

For more information on the plugin, see Activate Application Portfolio Management. See Predictive Intelligence for Application Portfolio Management to know more about machine-learning solution for business applications.

Procedure

1. Navigate to **All** > **Application Portfolio Management** > **Business Application Lifecycle Management** > **Business Application Catalog**.

   Business Application Lifecycle Management Services opens in a service catalog page.

2. Click the **Register a Business Application** card or click **View Details** in the Register a Business Application card to register a new business application.
3. Enter the details in the Register a Business Application form.

   Name of the business application is mandatory. Mandatory fields have a red asterisk (*) beside them.

4. Click **Submit**.

   The system validates your request to check if a business application with the same name exists. If yes, then an error message is displayed. If no, then a flow is triggered and a request to register a business application is created.

   The approval request is sent to the Business Application Registration Approval Group. After a member of the group approves your request, the business application gets created as a record in the business application table. You will receive an email notification for the same.

5. To retire a business application that you no longer require, click the **Retire a Business Application** card or click **View Details** in the Retire a Business Application card.

   a. Select the name of the application from the list of values in the Retire a Business Application form.
   Conditions to retire a business application:
   - Only if you are an IT owner of the application, business owner, or a user who supports the application, you can request to retire an application.
   - You require sn_apm.apm_user or sn_apm.apm_analyst role to retire a business application.
   - As an APM user, you cannot delete a business application record or mark the application as **Inactive**. However, you can raise a new request to decommission an application.
   - The business application that you choose to retire must not be in **Retired** status nor the application record **False** (inactive) in the **Active** field.

   b. Click **Submit**.

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Manage Business Application Lifecycle Management service requests

You can approve requests raised by an APM user either for a new business application or retire an application that the user no longer requires.

Before you begin

Role required: sn_apm.apm_analyst

The approver (apm_analyst) must also be a part of the Enterprise Architect Group. To add or modify the members in the group, navigate to **Application Portfolio Management** > **Administration** > **Services Approval Group**.

Procedure

1. Navigate to **Application Portfolio Management** > **Business Application Lifecycle Management** > **Service Requests**.

   All requests related to the Business Application Lifecycle Management services are stored as tasks in the Business Application Requests table [business_app_request].

   Note the tasks that are in your queue for your approval.

2. Select the task number.
3. Scroll down to the Approvers related items.
4. Select the state of the approval task.
5. Select the appropriate state from the list in the **State** field.
6. Enter a comment if required.
7. Select **Update**.

   Once you approve or reject a request, a corresponding flow is triggered. Select the **Show flow engine context** related link to view the flow engine context of the request. You can also navigate to **Application Portfolio Management** > **Administration** > **Services Flow Designer** to see the flow in the flow designer.

   If you approve a Register a Business Application request

   - The approved business application is created as a record with an identification number in the business applications table [cmdb_ci_business_app]. The status of the application is in the **Implementing** state.
   - An email is sent to the requester notifying the approval of the business application.

   If you approve a Retire a Business Application request

   - Based on the value selected in the system property, *sn_apm.retireBusinessApplicationTaskType*, a project, or demand is created. If the value is set as project, then a project template defined in the system property, *sn_apm.retireBusinessAppProjectTemplate*, is applied.

     Note:
     If the value is set to project in the system property *sn_apm.retireBusinessApplicationTaskType*, you require Strategic Portfolio Management (SPM) subscription to approve requests to retire business applications and create a project.

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The base system of Application Portfolio Management offers a project template called **Retire Business Application** with eight different pre-defined project template tasks for proper decommissioning of the application.

After the project is created and a project manager is assigned to the project, the project manager can review, edit, or add tasks as required. For more information on project templates, see Project templates. To understand the project tasks, see Project tasks.

- If the value in the *sn_apm.retireBusinessApplocationTaskType* system property is set as demand, then a demand is created.

  Unlike a project, APM doesn't generate a demand from a template with pre-configured demand tasks. Instead the demand is created with certain values auto-populated in mandatory fields.

  To view the demand that is created to retire an application, navigate to **Application Portfolio Management** > **Application Portfolio Analysis** > **Demands**.

  For field information, see Demand form to retire an application.

- If you approve a request for which a project or demand is already in place, then another project or demand will not be created for the request.
- If the request to retire an application is rejected, then an email notification is sent to the requester. However, the status of the business application isn't updated irrespective of it being approved or rejected.
- You can delete a business application record or mark an application as **Inactive** as an APM admin or analyst.

Use Business Application Lifecycle Management to request an architecture review

You can request a review of your new architecture design proposal on the technology of a business application by presenting it to the architecture review board.

Before you begin

Role required: sn_apm.apm_user

About this task

As an application owner you can propose a modification to the underlying technology of a business application, modification to network design, or propose a new service, solution, or hardware standard.

Your design proposal is reviewed by a team of enterprise architects forming an Architecture Review Board with goals to:

- Align development with IT strategies.
- Improve the product quality through the design review process.
- Provide guidance on recommended practices for specific design questions.
- Act as a referral team for security, performance, UI design to review upcoming features that may be impacted.

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Procedure

1. Navigate to **All** > **Application Portfolio Management** > **Business Application Lifecycle Management** > **Business Application Catalog**.
2. Click the **Request Architecture Review** link or **View Details** in the Request Architecture Review card to request an architecture review.
3. On the form, fill in the fields.

   Name of the business application is mandatory. Mandatory fields have a red asterisk (*) beside them.

   Note:

   You must be the business owner, IT Application owner, or one who supports the application to request an architecture review.

   For field information, see Request Architecture Review form.
4. Click **Submit**.

   On submission, an approval request is sent to the members of the Enterprise Architect Group. An email notification is sent to you as soon as your request is approved by the review board. You shall be notified even if your request is rejected.

Create or edit an indicator to assess an application

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

Before you begin

Role required: sn_apm.apm_admin

About this task

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

Procedure

1. Navigate to **All** > **Application Portfolio Management** > **Administration** > **Application Indicators**.
2. Click **New** or click an existing application indicator to edit.
3. On the form, fill in the fields.
   For field information, see Indicator form.
4. Click **Submit**.
5. To regenerate the indicator score of an application, click open an indicator.

   a. Click the **Regenerate indicator score** option in the context menu.

      The action deletes the existing scores and generates new scores instead of just updating the existing scores for that indicator. This indicator may be attached to one or more scoring profiles, and therefore recalculates the scores of all business applications that are associated to this scoring profile.

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b. Select the Fiscal Period in the Regenerate application indicator scores dialog box.

c. Click **OK**.

d. Click **Update**.

6. To create a dependent indicator, click open the indicator.
   If you had selected Indicators in the **Data source** field, then when you open that indicator record, the Indicator Dependencies related list is displayed.

   Note:
   An indicator which has its data source as indicator cannot be added as a dependent child indicator.

   a. Click **New** in the Indicator Dependencies related list.
   The parent indicator auto-populates in the Parent Indicator field.

   b. Select a dependent indicator in the **Child Indicator** field.

   c. Click **Submit**.

7. To assess the business application, click **Generate Assessments**.

What to do next
Use the preconfigured indicators to assess the applications based on cost, quality, and risk.

Generate survey assessments and view results within APM

Within APM you can assign an assessment questionnaire to a user who uses a business application and get the feedback about the application.

Before you begin
Role required: sn_apm.apm_admin

About this task
APM integrates with Assessments and Surveys to evaluate business applications and business capabilities based on assessment metric types. Application indicators that are sourced from assessments can only be assessed using the assessment metric.

An **assessment metric** is a trait or value that is used to evaluate a business application. Related metrics are grouped under an **assessment metric category**, which can be used to evaluate business applications for that category only. Whereas a **metric type** can comprise many metric categories that define a set of criteria an organization uses to evaluate its business applications.

For example, an organization may employ assessment metric types such as customer satisfaction, business value, technical risk, and functional fit to evaluate its business applications. Further, the organization can assess a group of business applications based on one assessment metric category, such as CSAT category for customer satisfaction. Within this CSAT category, you can define an actual assessment metric such as a question in an assessment questionnaire, *How likely is it that you would recommend this application to others?*

Your business application is the assessable record and it is linked to a metric type. Use the custom UI to set conditions based on the columns of the business application table that meet your criteria and filter the applications. Select either a user group or selective users as target

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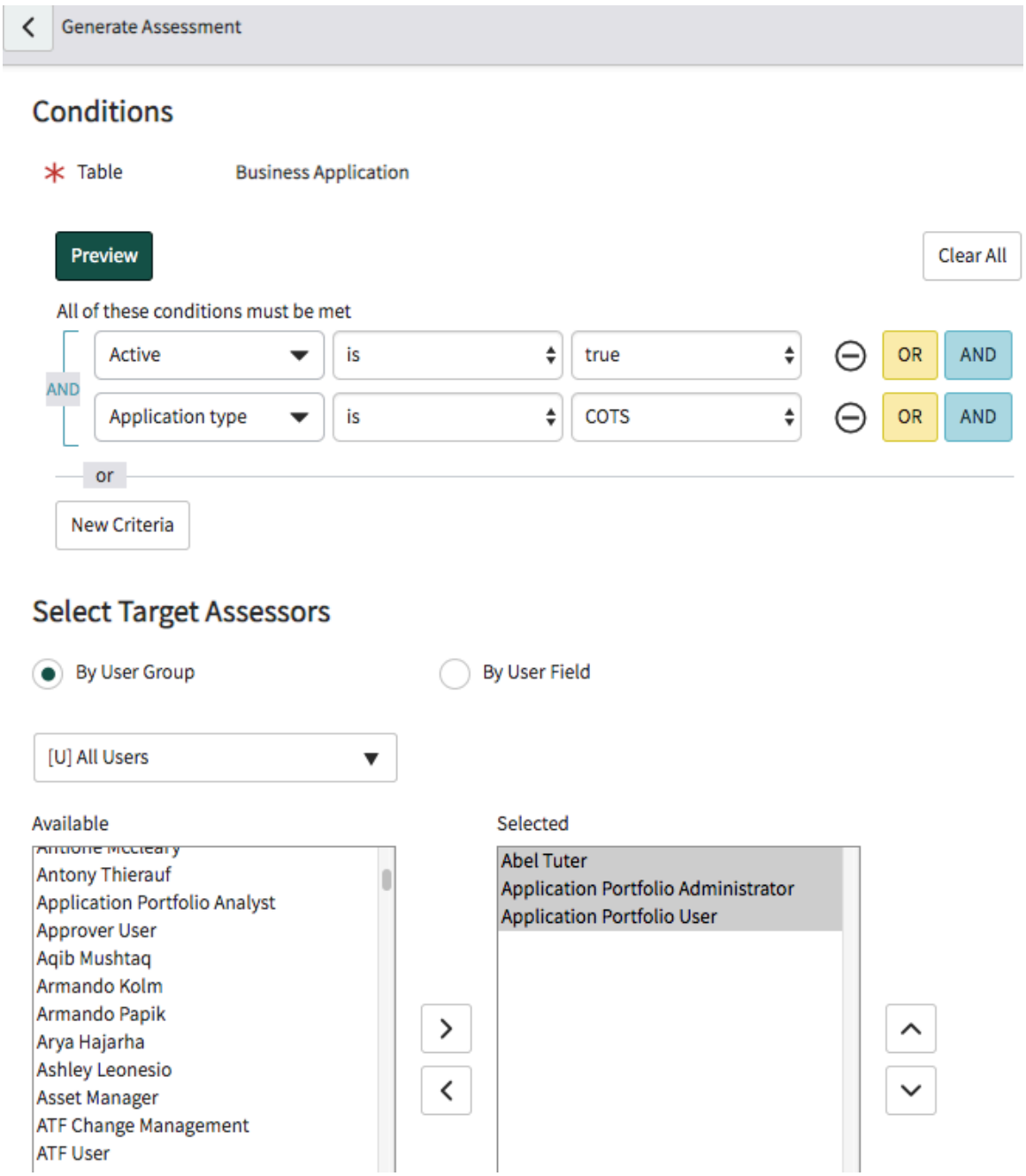
assessors and send out the questionnaires for them to take the survey. View the assessments and their status in the **Assessment Instances**, and the results in the **Metric Category Results** tabs of the **Indicator** related lists.

Procedure

1. Navigate to **All** > **Application Portfolio Management** > **Administration** > **Application Indicators**.
2. Click open an indicator whose data source is assessments.
3. Click the **Generate Assessments** button.
4. To filter the business applications that should be assessed, set your conditions in the **Field**, **Operator**, and **Value** fields of the condition builder in the Generate Assessment UI that opens up.

Generate Assessment UI



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Your filter criteria are applied on all records in the business application [cmdb_ci_business_app] table and you can filter applications by any column of the table.

5. To add dependent condition, click **AND** or **OR** next to the condition.
6. To add a top-level condition or multiple filter criteria, click the **New Criteria** button.
7. To clear existing filter conditions and set a new condition, click the **Clear All** button.
8. Select users in the **Select Target Assessors** region to send the assessment questions.

   You can either select a user group or move individual application users to the Assessors list.
9. Click **Send Assessments**.
10. Click **OK** to confirm in the Send Assessment dialog box.

    The user can view and take the assigned assessments by navigating to **Self-Service** > **My Assessments & Surveys**.

    For more information, see Take a survey.

    After the user submits the assessments, the **State** of the assessment instance in the **Assessments Instances** tab changes to **Complete**.
11. Click the **Assessments Instances** tab to view the instances of assessments that have been created, the total number of assessments that have been sent out to users who fit in the filter criteria, and the status of the assessment instances.

    Each occurrence of a questionnaire assigned to one user is an assessments instance.

    Note:

    Indicator score and the corresponding application score are calculated only when all the users in the assessment group have completed the assessment.
12. Click the **Metric Category Results** tab to view the weight, rating, and normalized value of each business application that was assessed by the user or the user group.
    For more information, see View an assessment category result to know how the assessment results are calculated.

Create an application score profile and attach profile indicators

You can create an application score profile and update the default application profile with new profile indicators per your requirements. After you create a score profile, you have to associate it with indicators.

Before you begin

Role required: sn_apm.apm_admin

About this task

You can create or update the scoring profile with new indicators and associate it with the business application. You can also use the same indicators within many scoring profiles, which generate indicator scores unique to that scoring profile.

Procedure

1. Navigate to **All** > **Application Portfolio Management** > **Administration** > **Scoring Profiles**.
2. Click **New**.

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3. On the form, fill in the fields.
   For field information, see Scoring Profile form.
4. Right-click the form header and click **Save**.

   After creating a score profile, you must associate a profile indicator to the score profile.

5. In the Profile Indicators related list, add indicators.

   a. Click **New**.

   b. On the form, fill in the fields.

Profile Indicator form

Field	Description
Profile	Name of the application profile.
Indicator	Name of the application indicator.
Evaluate within Application Scoring Profile	Option for considering the business applications tied to the selected scoring profile in the evaluation of scores. Clearing the check box entails evaluation of all business applications within the enterprise or across all scoring profiles.
Domain	The domain to which this indicator belongs.
Used in CI score calculation	Option for using the application indicator in calculating the application score.
Weightage	Numeral for the indicator. Weightage provided in the application score profile for an indicator contributes to the total score of the application.

   An indicator that is added to the profile can be a parent indicator with dependent child indicators. When such a parent indicator is added to a scoring profile, then all its dependent child indicators are also added with weightage 0, if they are not already present in the scoring profile.

   For more information on how to create a dependent indicator, see Create or edit an indicator to assess an application.

   c. Click **Submit**.

What to do next

Regenerate scores: Click the **Regenerate scores** button to regenerate the scores of all the indicators attached to the scoring profile. This action deletes the existing scores and generates new scores instead of just updating the existing scores. Therefore, the scores of all the business applications that are associated to this scoring profile are also recalculated.

You can schedule a job to calculate application scores periodically.

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View application indicator scores

View the application indicator scores that are sourced and computed based on the sourcing setup defined for the application indicators. The assessment framework calculates the score only for those indicators which are attached to at least one scoring profile. The indicator scores help you to evaluate the applications and make strategic decisions on them.

Before you begin

Role required: sn_apm.apm_analyst

About this task

You can view the application indicator score details of the business applications for a fiscal period.

Procedure

1. Navigate to **All** > **Application Portfolio Management** > **Application Ratings** > **Indicator Scores**.
   The applications are listed showing the indicators, indicator scores, normalized value, application weight, and total weight for each fiscal period. The normalized value, indicator score, application weight, target maximum, target minimum, and total weight are all rounded to two decimal places.
2. Click a business application in the list to view the details of the application.

Related topics

Create or edit an indicator to assess an application

View all application scores

View the application scores that are computed as a weighted sum of the application indicators on the application scoring profile. The application scores help to evaluate the applications and make strategic decisions on them.

Before you begin

You can create the scores manually, but it is recommended that the assessment framework computes the scores.

Role required: sn_apm.apm_analyst

About this task

You can view the application score for a particular business application in a fiscal period.

Procedure

1. Navigate to **All** > **Application Portfolio Management** > **Application Ratings** > **All Application Scores**.
   The applications are listed with their respective scores for each fiscal period. The scores are rounded to two decimal places.
2. Click a business application in the list to have a detailed view of the application.

Related topics

Normalization of application scores

Analyze application scores in a bubble chart

Bubble charts are interactive graphs that help you identify strategies by plotting application indicator scores. You can evaluate applications for a category and decide whether to invest,

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sustain, or to replace an application by configuring multiple combinations of indicators in the bubble chart.

Before you begin

Role required: sn_apm.apm_analyst

About this task

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

Procedure

1. Navigate to **All** > **Application Portfolio Management** > **Application Portfolio Analysis** > **Analyze**.

   The Group Analysis page is displayed.

   The Group Analysis page has the following sections:

   Assessment Period

   The fiscal period for which the analysis of applications is done.

   Filter Apps

   Helps filter the application categories based on the criteria set on the application indicator scores.

   Categories drop-down

   Helps to filter application by groups such as Application Family, Application Category, and Capability.

2. Select **Application Category** from the Category drop-down list.

   List of capabilities is displayed.

3. Click an application category to open it.

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

   Use the **Application Analysis** section to compare applications with the selected indicators. It shows the total score of the application rounded to two decimals, along with contract renewal details, its life-time details, and the different costs associated with the application. You can analyze to know which applications to invest further and that which are not really useful. To view the business application record details in the Business Application form, click the name of an application in the list. To view the application details in a dashboard view, click the Application 360 tab in the Business Application form.

4. To change the configurations of the bubble chart, click the configuration icon ( ) icon and then fill in the fields on the Select Chart Dimensions form.
   For field information, see Select Chart Dimensions form.

What to do next

Point to the bubble in the chart and click the application or right-click the bubble and select **Create Demand** to create a demand for the application.

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Create or edit a bubble chart for application strategies

Set up a bubble chart to compare and evaluate the relative standing of applications in selected categories. The chart helps you determine which applications to invest more in, keep, replace, or eliminate.

Before you begin

Role required: sn_apm.apm_admin
If you require new indicators, create the application indicators before you create the application bubble chart for which the application framework calculates the scores.

About this task

You can configure existing application bubble charts or create them to align with your business needs.

Procedure

1. Navigate to **All** > **Application Portfolio Management** > **Administration** > **Bubble chart**.
2. Click **New** to create a new chart or click the name of an existing chart that you want to edit.
3. On the form, fill in the fields.
   For field information, see Application bubble chart form.
4. Click **Submit**.

What to do next

To view the bubble chart, go to the Group Analysis page.

Monitor performance, costs, and workloads in Application 360

Application 360 dashboard performs as a reporting tool and uses Performance Analytics to provide a decision-making approach to Application Portfolio Management by identifying which business application requires focus and attention. The dashboard helps you to analyze the indicator scores and execute effective decisions.

Before you begin

In the Business Application choice list, select an application to monitor its performance, costs, and workload in the following tabs and sections within the application 360 dashboard:

- **Overview**: Review the overall application score for the fiscal period.
  - **Application Indicator Scores**: View the trend and distribution for the different indicators of the selected fiscal period.
- **Costs**:
  - **Total Costs Fiscal Quarterly**: View the details of the total cost incurred in the quarterly fiscal period.
  - **Scorecard**: Ascertain the cost details and ratings over time, comparing them over different quarters.
- **Workload**: View the graphical illustration of the number of new incidents, problems, and changes over the selected fiscal period and the workload trend.

Role required: sn_apm.apm_analyst

Procedure

Navigate to **All** > **Application Portfolio Management** > **Application Portfolio Analysis** > **Application 360**.

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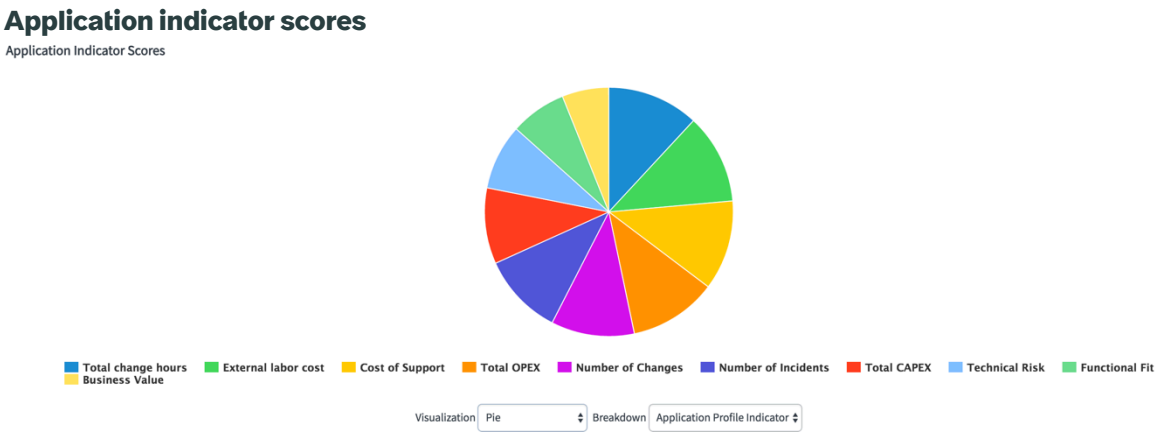

Related topics

Getting started with reports

Create and use dashboards

Assess the performance of applications in the dashboard

Use the Application Assessments dashboard for an overview of reports on the performance of the business applications. The spline chart gives you a trend of the application indicators against the normalized value over different quarters in a fiscal period.

Before you begin

You must have the Performance Analytics – Content Pack – Application Portfolio Management (com.snc.pa.apm) plugin activated before you can use the Application assessments dashboard. The plugin gives you access to the APM application indicator scores used in Performance Analytics (PA) reports and dashboards.

Role required: sn_apm.apm_user

About this task

Application Portfolio Management provides preconfigured reports in the Application Assessments dashboard. You can configure these reports using dashboards. You can also filter data on the dashboard.

The Application Assessments dashboard is a responsive dashboard that provides a complete view of applications. You can share widgets with different indicators and indicator scores. The PA widgets on the dashboard visualize data over time, helping you analyze business processes and identify areas for improvement.

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

- **Customer satisfaction trend**: Level of customer satisfaction over time with the various applications that belong to the application family. The normalized value is derived by computing the maximum and minimum application weight values.
- **Usage trend**: usage of applications over time.
- **Business value trend**: business value of the applications over time.
- **Cost of support trend**: cost of the applications over time.
- **Total changes trend**: total changes over time.
- **Technical Risk Trend**: Technical risk the applications may have over time.

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Procedure

1. Navigate to **All** > **Application Portfolio Management** > **Application Portfolio Analysis** > **Dashboard**.
2. To save a chart as a JPG or PNG file, point to the chart and click the menu icon that appears.
3. To filter the data in the spline charts, select options from the **Application Category**, **Portfolio**, **Business Process**, and **Business Unit** lists.

> **Note:**
> Activate PPM Standard (com.snc.financial_planning_pmo) plugin to apply the portfolio filter.

Related topics

Getting started with reports

Create and use dashboards

Create a goal for an application strategy

After assessing the applications and deciding on strategies, set concrete goals to maximize or minimize depending on the indicators for the selected fiscal period.

Before you begin

Role required: user_admin, pps_admin

About this task

To understand how your organizational strategies are performing, see the Strategic Spend Tracking for PPM dashboard topic. It provides comprehensive visualization to help you understand how the planned costs, actual costs, and benefits for projects aligned to your organization's strategies trend over time.

Procedure

1. Navigate to **All** > **Application Portfolio Management** > **Home** and click **Create** in the **Opportunities & Solutions**, Goals section.

   You can also navigate by any of the following steps:

   - **Application Portfolio Management** > **Application Portfolio Analysis** > **Goals** and click **New**.
   - **Organization** > **Goals** and click **New**.
2. Fill in the form fields.
   For field information, see New Goal form.
3. Click **Save**.
4. In the Recent Goals section, click the goal that you created and update the following fields:
   For field information, see Update Goal form.
5. Click **Save**.
   You can view all the goals from the list in the Recent Goals section of the portal by clicking **View all**.

What to do next

You can create a program to execute the goal.

Related topics

Allocate or modify the strategy and goal percentage for a project

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Create a demand towards achievement of goal

Use a demand as a step to identify cost saving opportunities on the applications and to meet the target. The strategy that you associate with the demand action decides the strategy for the application.

Before you begin

Role required: sn_apm.apm_analyst

About this task

Create a demand to capture details like action, start and target fiscal period, application, program, and so on.

Procedure

1. Navigate to **All** > **Application Portfolio Management** > **Application Portfolio Analysis** > **Demands** and click **New**.

   You can also navigate to the Demand form from any of the following portals:

   - Application Portfolio Management Home page
   - Capability Based Planning map
   - Bubble chart
   - Technology Portfolio Management timeline

2. On the form, fill in the fields.
   For field information, see Demand form.
3. To submit the record and go back to the list view, click **Submit**.
4. Click **Save** to save the record and remain on the same form to add more details to the demand.

Create a program for an application goal

Create a program, link it to the goal that you created, and associate a program manager to the program. After you create a goal, you should have a program to achieve the goal that you created.

Before you begin

Note:

You can create a program only when you activate PPM Standard (com.snc.financial_planning_pmo) plugin.

Role required: sn_apm.apm_analyst

Procedure

1. Navigate to **All** > **Application Portfolio Management** > **Home**.

   You can also navigate to **Application Portfolio Management** > **Application Portfolio Analysis** > **Programs** and click **New**.

2. Click **Create**.
3. On the form, fill in the fields.
   For field information, see New Program form.
4. Click **Save**.
   You can view all the programs in the Programs list section of the portal.

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What to do next
Learn about and create a guided plan to execute the program that you have created or any other program in the list.

Create a guided plan to execute a program

Create a guided plan by setting goals, identifying opportunities, creating demands, and tracking the projects. The guided plan helps you to implement the program that you created.

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

You should have created a program before you create a guided plan for the program.

Role required: sn_apm.apm_analyst

About this task
The Program Navigation page guides you in setting a goal target for the fiscal years to achieve the goal. You can also view the application rationalization roadmap at any stage of creating the program.

1. Navigate to **Application Portfolio Management** > **Home**.
2. Click **View** in the **No. of Programs** pane of the **Opportunities & Solutions** section.
3. Click a program in the Programs list.
4. Click the **Select Fiscal Period to start planning** choice list in the **Fiscal Period** section and select the financial year to start with the program steps.

Procedure
- **Step 1: Set Goal Contribution Target**

  1. Click **Set target**.
  2. On the form, fill in the fields.
     For field information, see Goal Contribution Target form.
  3. Click **Save**.
     The **Step 1: Set Goal Contribution Target** shows the percentage of the goal that you want to achieve in the selected fiscal period. For example, if your goal is to maximize cloud applications by 40% in FY18 and you set the **Target Goal Contribution %** as 50%, then the **Set Goal Contribution Target** displays 20%.

- **Step 2: Identify Opportunities**

  1. Click **Identify Opportunity** in the Program Navigation page.

     On the **Group Analysis** page, review the assessment period, analyze the application categories, and assess the number of applications against each category.
  2. Click the **Select Fiscal Period to start Analysis** choice list in the **Assessment Period** section and select a fiscal period for which you would like to analyze the applications.
  3. Use the **Filter Apps** pane to set your filter conditions based on the application indicators and scores.

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4. Compare and analyze the applications by category name in the **Application Categories** section.

5. Click an item in the **Category Name** column.

6. Right-click a bubble in the bubble chart and click the **Create Demand** prompt to create a demand.
   For example, if your goal is to invest more on a category, then click the invest bubble to achieve that goal.

   After you save the demand, the bulb icon on the top-right corner of the page displays the number of demands that are created.

- **Step 3: Track Project**

1. Click the projects link to track the status of the project anytime.
   The Program Workbench opens up, which is a central location for creating and managing projects. As the demand manager approves the demands and the projects are executed, you can navigate to the program workbench to track the status of the projects.

Add a TRM product

As an Enterprise Architect, you can add a new TRM product to the TRM library.

Before you begin

Role required: sn_apm_analyst

Procedure

1. Navigate to **All** > **Application Portfolio Management** > *Technology Reference Model* > **Products**.
2. Click **New**.
3. On the form, fill in the fields.
   For field information, see New TRM product form.
4. Click **Submit** or **Update**.

Add or edit a TRM product request

Add a new request or edit an existing request to include a new software or hardware product to the TRM library.

Before you begin

Role required: sn_apm.apm_user

Procedure

1. Navigate to **All** > **Application Portfolio Management** > *Technology Reference Model* > **Product Requests**.
2. Create or edit a request.
   - To create a TRM product request, click **New**.
   - To edit an existing TRM product request, click the name of the product request.
3. On the form, fill in the fields.

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For field information, see TRM Product Request form.

4. Click **Submit** or **Update**.

Add or edit a TRM product lifecycle request

Add a new request or edit an existing request to create a lifecycle for a TRM product.

Before you begin

Role required: sn_apm.apm_user

About this task

In the TRM library, each product is associated with a set of phases such as Approved, Approved with Constraints, Divest, Evaluation, and Unapproved.

Procedure

1. Navigate to **All** > **Application Portfolio Management** > **Technology Reference Model** > **Product Lifecycle Requests**.
2. Create or edit TRM product lifecycle.
   - To create a new TRM product lifecycle, click **New**.
   - To edit an existing TRM product lifecycle, click the name of the life cycle.
3. On the form, fill in the fields.
   For field information, see TRM Product Lifecycle Request form.
4. Click **Submit** or **Update**.

Request a TRM product using the TRM Catalog

Request a TRM product using the TRM catalog to add a new software to the TRM library.

Before you begin

Role required: sn_apm.apm_user

Procedure

1. Navigate to **All** > **Application Portfolio Management** > **Technology Reference Model** > **TRM Catalog**.
   The Technology Reference Model Management page opens in the Service Catalog page.
2. Click the **Request TRM Product** card.
3. On the Request TRM Product form, fill in the fields.
   For field information, see TRM Product Request using catalog form.
4. Click **Submit**.

Request a TRM product lifecycle using the TRM Catalog

Request a TRM product lifecycle using the TRM catalog to add the lifecycle for a TRM product.

Before you begin

Role required: sn_apm.apm_user

Procedure

1. Navigate to **All** > **Application Portfolio Management** > **Technology Reference Model** > **TRM Catalog**.
   The Technology Reference Model Management page opens in the Service Catalog page.

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2. Click the **Request TRM Product Lifecycle** card.
3. On the Request TRM Product Lifecycle form, fill in the fields.
   For field information, see TRM Product Lifecycle Request form
4. Click **Submit**.

Approve or reject a TRM product or product lifecycle request

As an Enterprise Architect, approve or reject a TRM product version request submitted by other users.

Before you begin

The user must be part of the Enterprise Architect Group.

Role required: sn_apm.apm_analyst

About this task

When an APM user requests for TRM product or TRM product lifecycle approval, an email notification is received by the approver. The approver belongs to the Enterprise Architect group.

Procedure

1. Navigate to **All** > **Service Desk** > **My Approvals**.
2. Select the TRM product or product lifecycle request for which you want to provide approval.
3. Select **Approve** or **Reject**.

Result

The requester receives an email notification for the approval or rejection.

Add or edit a TRM category

Add a new request or edit an existing request to create a TRM category.

Before you begin

The user must be part of the Enterprise Architect Group.

Role required: sn_apm.apm_analyst

Note:
The user (sn_apm.apm_analyst) must be part of the Enterprise Architecture Group.

About this task

A TRM category is a grouping of TRM software products by their purpose and function. The categorization helps you to consolidate TRM products and rationalize decisions. You can create a TRM category or edit an existing one to align it with your business requirements. You can define categories or rely on the Software Asset Management product classification.

Procedure

1. Navigate to **All** > **Application Portfolio Management** > **Technology Reference Model** > **Categories**.
2. Create or edit a category.
   - To create a category, click **New**.
   - To edit an existing category, click the name of the category.
3. On the form, fill in the fields.

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For field information, see TRM Category form.

4. Click **Submit** or **Update**.

View and edit your product requests

View all your product requests, track their statuses, and edit your existing requests. You can also manage the approvers for your request.

Before you begin

Role required: sn_apm.apm_user

Procedure

1. Navigate to **All** > **Application Portfolio Management** > **Technology Reference Model** > **My Product Requests**.
   You can see all your product requests and their approval status.
2. Click the name of an existing product request that you want to edit.
3. On the Request TRM Product form, fill in the details.
   For field information, see TRM Product Request form.
4. In the Approvers section, add or edit approvers for your request.
   - To add a new approver, click **New**.
   - To manage approvers for your request, click **Edit**.
5. Submit the changes by clicking **Update**.

View and edit your product lifecycle requests

View all your product lifecycle requests, track their status, and edit your existing requests. You can also manage the approvers for your request.

Before you begin

Role required: sn_apm.apm_user

Procedure

1. Navigate to **All** > **Application Portfolio Management** > **Technology Reference Model** > **My Product Lifecycle Requests**.
   You can see all your product life-cycle requests and their approval status.
2. Click the name of an existing product request that you want to edit.
3. On the Request TRM Product Lifecycle form, fill in the fields.
   For field information, see TRM Product Lifecycle Request form.
4. In the Approvers section, add or edit approvers for your request.
   - To add a new approver, click **New**.
   - To manage approvers for your request, click **Edit**.
5. Submit the changes by clicking **Update**.

Add or edit a TRM phase

Define your own TRM phase or edit an existing TRM phase.

Before you begin

The user must be part of the Enterprise Architect Group.

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Role required: sn_apm.apm_analyst

About this task
The color and shape of a phase are used to represent the phase of the TRM product.

Procedure
1. Navigate to **All** > **Application Portfolio Management** > **Technology Reference Model** > **Phases**.
2. Create or edit a TRM phase.
   - To create a TRM phase, click **New**.
   - To edit an existing TRM phase, click the name of the phase.

   The following TRM phases are available from the base system:

   - Approved: The technology is approved for use.
   - Approved with Constraints: The technology can be used within the specified constraints specified in the comments.
   - Divest: A decision was taken to divest from the use of the technology.
   - Evaluation: This technology is being evaluated and cannot be used to production purposes.
   - Unapproved: The technology is not permitted to be used.
3. On the form, fill in the fields.
   For field information, see TRM Phase form.
4. Click **Submit** or **Update**.

Review the TRM lifecycle status in the Technology Portfolio Management page

View the TRM lifecycle information along with the risk and technical debt information in the Technology Portfolio Management page.

Before you begin
Role required: sn_apm.apm_analyst

About this task
The lines in the TPM screen indicate the life cycles of the product versions. The lines are color coded, which indicates the stages of risk that the software model is in, at that month or quarter. The TPM page helps you to view the status of business applications and their technical debts.

Procedure
1. Navigate to **All** > **Application Portfolio Management** > **Technology Portfolio Management (TPM)** > **Technology Lifecycles**.
2. Select a view grouped by Business Application or Software Model.
3. View the timeline across all the months in a year by clicking the **Monthly** button.
   By default, the **Quarterly** button is enabled to show the timeline for the four quarters of a year. Instead, the monthly view helps you to track the risk stage of a business application or software model for any month in a year.
4. Click the production icon (P) and view the production instances that are liable to risks in the current quarter or month.
5. Display the life-cycle data sources of software models.

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- To display the life-cycle data sources of a particular software model, click the expand icon ( ) of the software model.
- To display the life-cycle data sources of all software models related to a business application, click show all life-cycle data sources icon ( ).

  Use the icon to toggle between show and hide the data sources.

Configure the business application form for risk management

Configure the business application form to enable application managers to provide risk and control information associated with a business application through a risk assessment questionnaire or a control attestation survey.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **Application Portfolio Management** > **Application Portfolio** > **All Business Applications**.
2. Open a business application.
3. Click the **Additional actions** icon and select **Configure > Related Lists**.
4. Add **Risk Questionnaire**, **Risk Summary**, **Risk Response Tasks**, **Control Attestations**, **GRC Issues**, and **GRC Issue Remediation Tasks** to the **Selected** list and click **Save**.
5. Add the Take attestation column to the **Risk Questionnaire** and **Control Attestations** related lists.
   a. Click either the **Risk Questionnaire** or **Control Attestations** tab to access the associated related list.
   b. Click any of the columns and select **Configure > List Layout**.
   c. Add **Take attestation** to the **Selected** list and click **Save**.
   d. Repeat the steps for the other related list.

What to do next

Respond to a risk assessment questionnaire or control attestation survey

Respond to a risk assessment questionnaire

Respond to a risk questionnaire to provide risk-related information for your business application to a risk manager.

Before you begin

Role required: grc_business_user

Procedure

1. Navigate to **All** > **Application Portfolio Management** > **Application Portfolio** > **All Business Applications**.
2. Open a business application.
3. Select the **Risk Questionnaire** related list.
4. Click the **Take assessment** link.

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5. Enter your responses in the form.
6. Click **Submit**

Take the control attestation survey

Return the control attestation survey to provide information to verify that a control is implemented for a business application.

Before you begin

Role required: grc_business_user

Procedure

1. Navigate to **All** > **Application Portfolio Management** > **Application Portfolio** > **All Business Applications**.
2. Open a business application.
3. Select the **Control Attestations** related list.
4. Click the **Take assessment** link.
5. Enter your responses in the form.
6. Click **Submit**

Create a data domain

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

Before you begin

Role required: sn_apm.apm_user

Although an Application Portfolio Management user (sn_apm.apm_user) can create a data domain, the access control on the Data Domain [sn_apm_data_domain] table is limited to its different users.

- The Application Portfolio Analyst and Application Portfolio Administrator with sn_apm.apm_admin role have create, write, and delete privileges.
- The Application Portfolio User with sn_apm.apm_user role has read access only.

Procedure

1. Navigate to **All** > **Application Portfolio Management** > **Information Portfolio** > **Data Domains**.
2. Click **New**.
3. On the form, fill in the fields.
   For field information, see Data Domain form.
4. Click **Submit**.

What to do next

Create an information object and link the data domain with the information object.

Create an information object referencing data domain

Create an information object to capture the logical data for the business application. This data becomes information when it is applied to the business application.

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Before you begin
Role required: sn_apm.apm_user

The Application Portfolio Analyst and Application Portfolio User can create information object, relate business application to information object, and relate information object to database catalog.

Procedure

1. Navigate to **All** > **Application Portfolio Management** > **Information Portfolio** > **Information objects**.
2. Click **New**.
3. On the form, fill in the fields.
   For field information, see Information Objects form.
4. Click **Submit**.

What to do next
After creating an information object, you must relate a business application to the information object with the cmdb CI suggested relationship.

Relate a business application to an information object

Relate a business application to an information object using the CI relationship [cmdb_rel_ci] table of type Uses::Used by. Use this suggested relationship to get the logical data of the information object, which can be used to leverage the business application.

Before you begin
Role required: sn_apm.apm_user

About this task
Note:

Use the custom-built Add Relationship UI to relate the business application with the information object because this UI also captures the attributes in the relationship between the two configuration items. You should not use the CMDB relationship editor to associate the two configuration items because the create, read, update, and delete (CRUD) attributes of the relationship cannot be captured in the relationship editor.

Procedure

1. Navigate to **All** > **Application Portfolio Management** > **Application Portfolio** > **All Business Applications**.
2. Open a business application record.
3. To relate the business application with an information object, click the Information Object Attributes related list.
4. To add an information object, click **Add**.
5. On the form, fill in the fields.
   For field information, see Add relationship form.

   By adding an information object to the business application, not only a record is created in the CI relationship [cmdb_ci_rel] table, but the CRUD attributes are also captured in the CI Relation Attributes [cmdb_rel_attributes] table.
6. Click **Save**.

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To edit the CRUD relationship of an information object, select the record and click **Edit**. In the Manage Relationship pop-up, update the CRUD details.

To delete the relationship between the business application and an information object record, select the record and click **Delete Relationship**. This action deletes the relationship record from the CI relationship table and also deletes the qualifier properties, if any, that are set in this relationship between the business application and the information object, which are captured in the CI Relation Attributes table.

To check for information objects that are not linked to any business applications, run the Information Objects not related to any Business Application desired state audit on demand. For more information, see Information Objects not related to any Business Application.

What to do next
Relate the information object to the database catalog.

Relate the information object to the database catalog

The information object draws the physical data from the database catalog, which references the database instances. Hence, create a relationship that is suggested between the information object and the database catalog.

Before you begin
Role required: sn_apm.apm_user

About this task
Suggested cmdb CI relationship, Depends on::Used by, relates the information object to the database catalog. The relationship works by drawing the physical data from the database and stores it as logical data in the information object table, which references the data domain.

For example, employee payroll details depends on Oracle database instance. If the relationship is reversed between the configuration items, then Oracle database instance is used by employee payroll.

- IT Operations Management Discovery discovers all servers, instances, and databases.
- Database Catalog is a list of all the databases.
- The Database Catalog (cmdb_ci_db_catalog) lists all the catalog objects or databases that are discovered from an instance of a database. For example, Oracle catalog and MySQL catalog are child tables of the database catalog.
- The Database Instance (cmdb_ci_db_instance) is the parent table. Oracle Instance (cmdb_ci_db_ora_instance) and MySQL instance are child tables of the Database Instance.
- The reference between a database instance and a database catalog is one to many.
- Since the database instance is hosted on the Server (cmdb_ci_server), it can access all the underlying configuration items.

Note:

You may have applications, the data of which are not stored in a conventional database. You can also track such unstructured data stored in configuration item tables such as configuration file (cmdb_ci_config_file), file system (cmdb_ci_file_system), and exchange mail box (cmdb_ci_exchange_mailbox). Use the same Depends On::Used by relationship type between the information object and the unstructured data sources to track the data.

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Procedure

1. Navigate to **All** > **Application Portfolio Management** > **Information Portfolio** > **Information Objects**.
2. To create a suggested relationship between the information object and the database catalog, open the information object record.
3. In the Related Items section of the Information Object form, click the add CI relationship icon (+) to launch the relationship editor and create the CI relationship.
   The filter is automatically applied on the database catalog.
4. Select the Depends on::Used By suggested relationship type.
5. In the Configuration Items section, select the record that is of a catalog class.
6. In the Relationships section, click the CI relationship icon (+).
7. Click **Save and Exit**.

   Ensure that the database catalog table has a reference of the database instance.

What to do next

Click the show dependency views icon ( ) in the **Information Object** related items to view the dependency of the business application that is using the information object, which is running on a database server.

Dependency view of the information object

Apply the information portfolio for auditing. Integrate with GRC (Governance, Risk, and Compliance) and use the information object as an entity. GRC uses any entity such as a database, server, or a business application to audit. Associating the information object as an audit entity gives you the complete profile of the business application that uses the information object and its source of data.

Relate a business application to another business application

Relate a business application to another business application using the CI relationship [cmdb_rel_ci] table of type Interfaced by::Interfaces. Use this suggested relationship to get the information of other business applications, which are interfaced with the business application.

Before you begin

Role required: sn_apm.apm_user

Procedure

1. Navigate to **All** > **Application Portfolio Management** > **Application Portfolio** > **All Business Applications**.
2. To create a suggested relationship between the business applications, open a business application record.
3. In the Related Items section of the Business Application form, click the add CI relationship icon (+) to launch the relationship editor and create the CI relationship.
4. Select the Interfaced by (Parent) from the Suggested relationship types section.
   The filter is automatically applied on the business application.
5. In the Configuration Items section, select the record that is of a business application.

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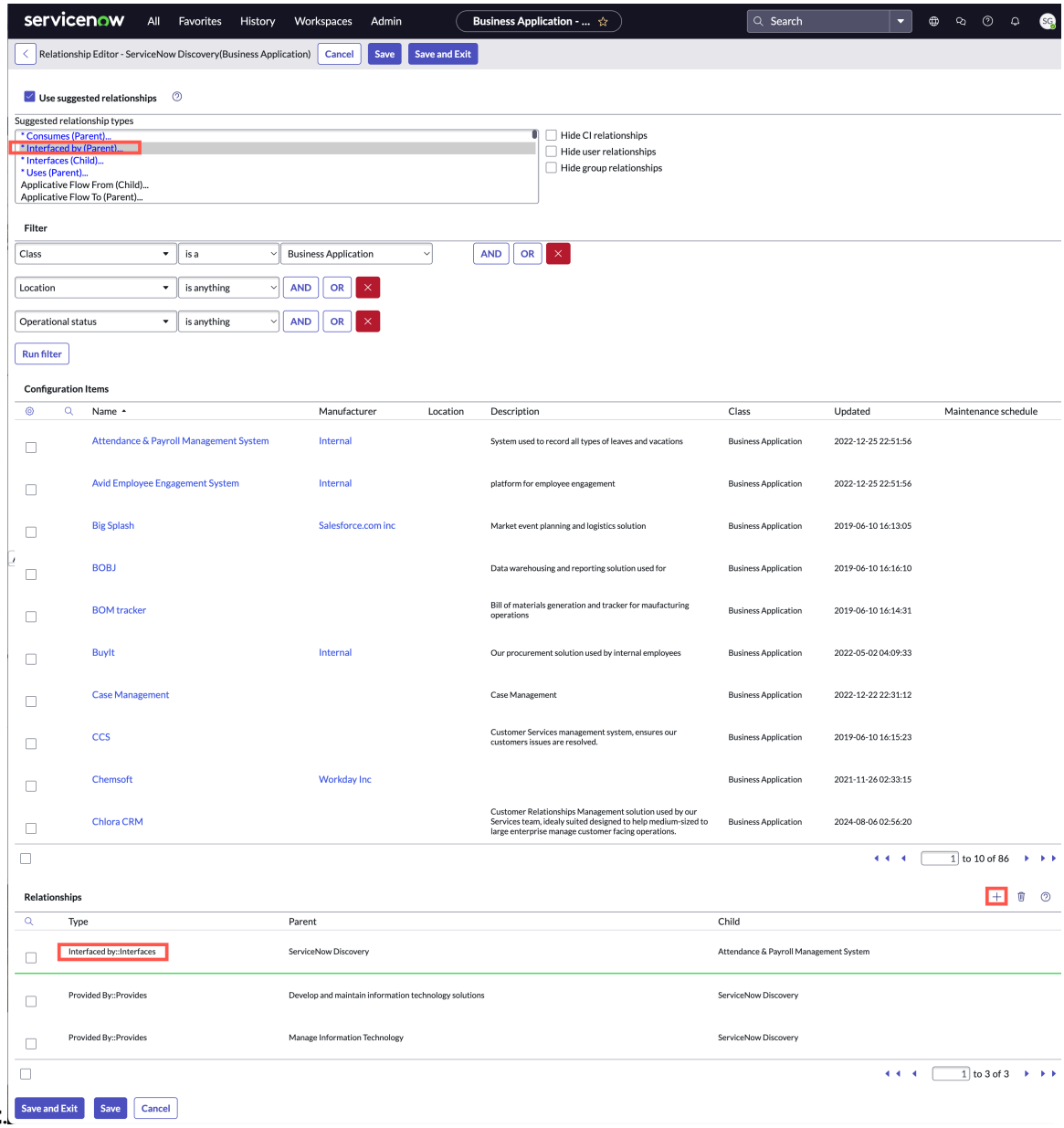
6. In the Relationships section, select the CI relationship icon (+) to create new relationship with selected configuration items.

   The Interfaced by::Interfaces relationship is added in the Relationships section.

7. Click **Save and Exit**.



What to do next

Click the show dependency views icon ( ) in the **Business Application** related items to view the dependency of this business application interfacing or interfaced by other business applications.

Visualize APM reports using CMDB Query Builder

APM uses CMDB Query Builder to query on a list of configuration items used in Application Portfolio Management and visualize them as reports.

Before you begin

Role required: sn_apm.apm_user

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About this task

APM takes advantage of CMDB Query Builder to build complex queries and retrieve data from CMDB CI classes, APM tables, and configuration items that are associated to each other by different CMDB CI relationships.

Before launching the reports that fetch data from the tables and CMDB CI classes, you must run the respective scheduled jobs. These jobs are set as active with frequency as **On Demand**. However, update the frequency as per your requirement to daily, weekly, monthly, periodically, once, on demand, Business Calendar – entry start, or entry end, based on how often the data for the report should be updated. Set the frequency of these scheduled jobs accordingly. For more information, see Run scheduled jobs for CMDB Query Builder reports.

Note:
Ensure to run these scheduled jobs from **Global** scope only. Only a system administrator can run these scheduled jobs from global scope. However, as an APM user you can view the reports.

Procedure

1. Navigate to **All** > **Application Portfolio Management** > **CMDB Query Builder**.
   All reports that the base system offers are provided as menu options in the application navigator under CMDB Query Builder.
2. Click the relevant CMDB query builder name for which you want to view the report.

   The report opens in a new tab and is rendered as a bar chart, by default. You can view and save the report for future use.

   Note:
   The data displayed on the report is retrieved from the latest execution of the scheduled job run on demand.

3. Click each option to view the respective report.

   Note:
   You must activate the PPM Standard plugin to generate Projects on a Business Application CMDB query builder report.

   APM base system provides the following list of queries to generate APM reports:

   Business Capabilities provided by Business Application

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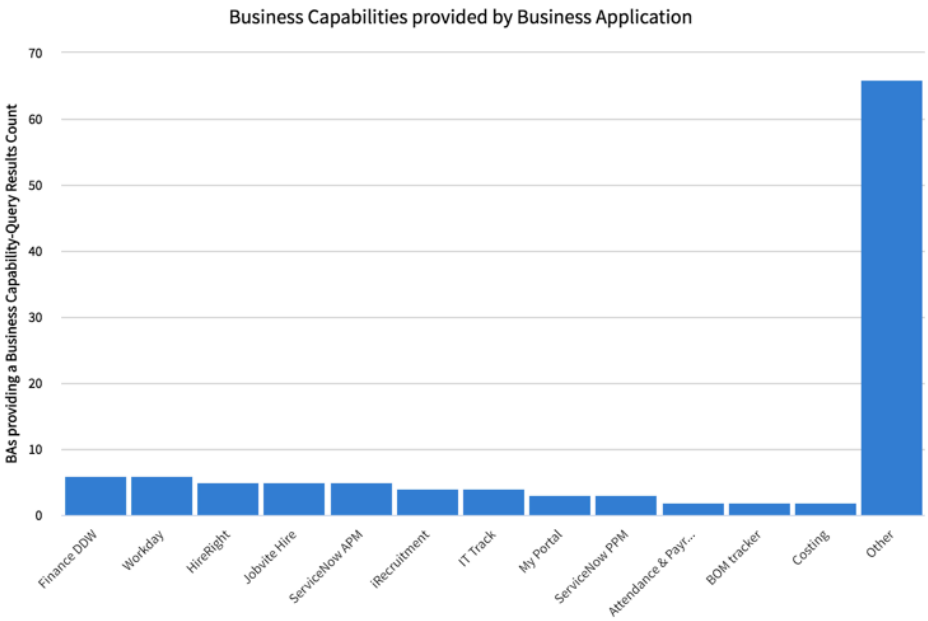
Report showing business capabilities provided by business application

Table: BAs providing a Business Capability-Query Results

All > Query Sys ID = 0a5e66b31b8810107a0bfd961a4bcbea

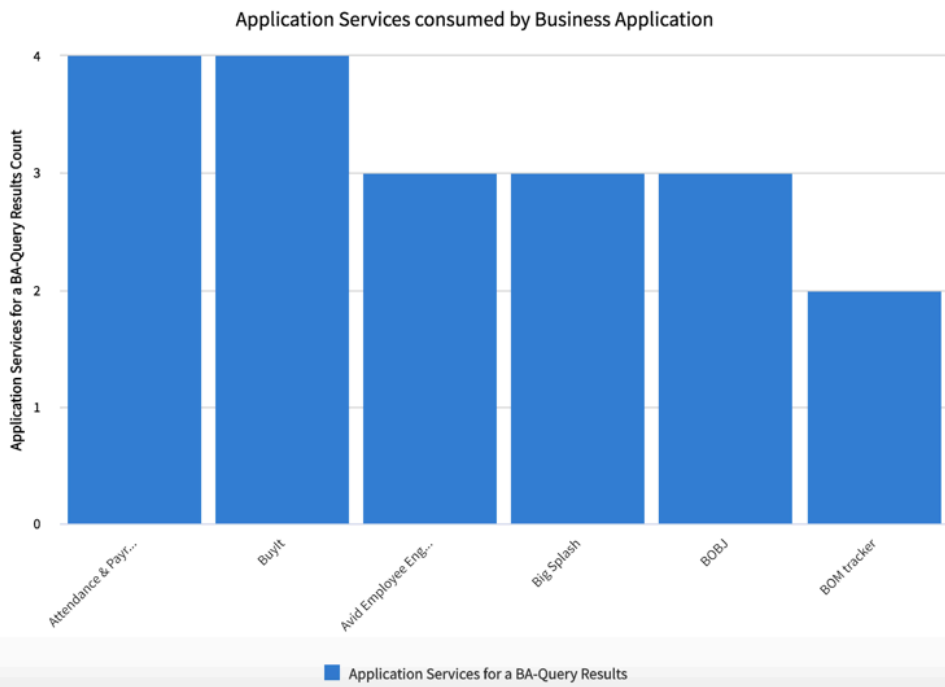


Application Services consumed by Business Application

Report showing application services consumed by business application

Table: Application Services for a BA-Query Results

All > Query Sys ID = 121eaab7db0810108979186c1396192f



Business Applications providing a Business Capability

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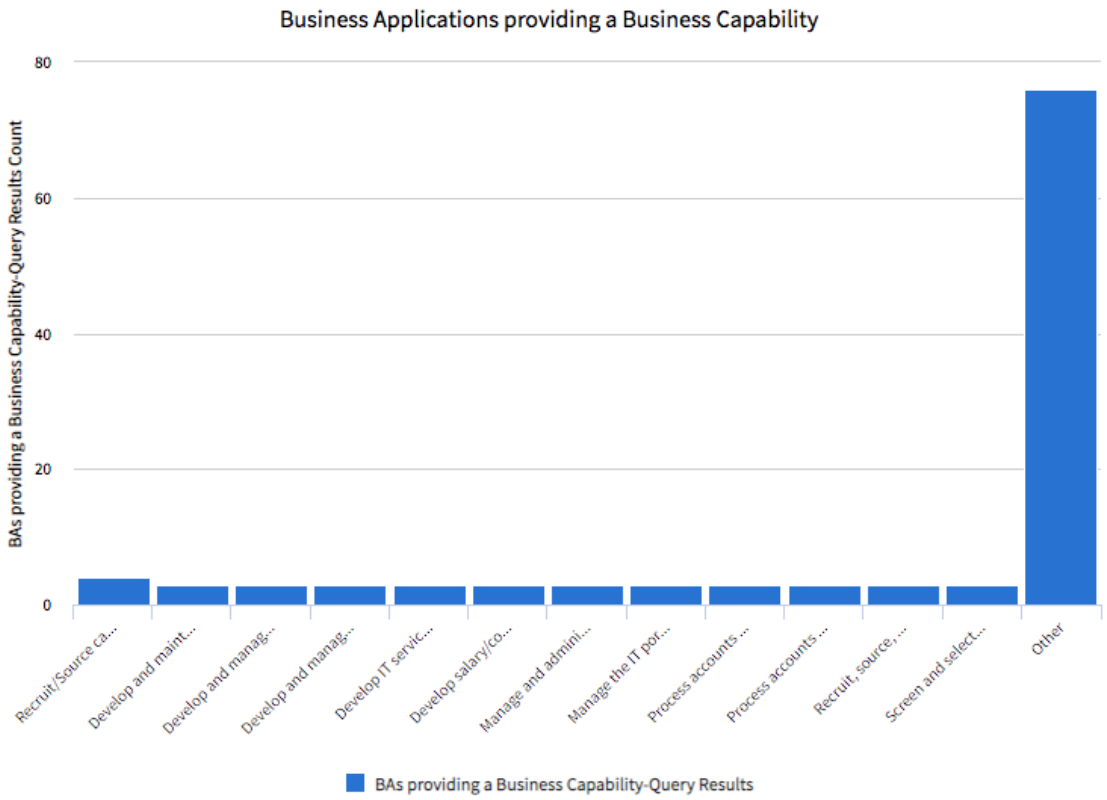
Report showing business applications providing a business capability

Table: BAs providing a Business Capability-Query Results

All > Query Sys ID = 0a5e66b31b8810107a0bfd961a4bcbea



Business Services provided by a Business Capability

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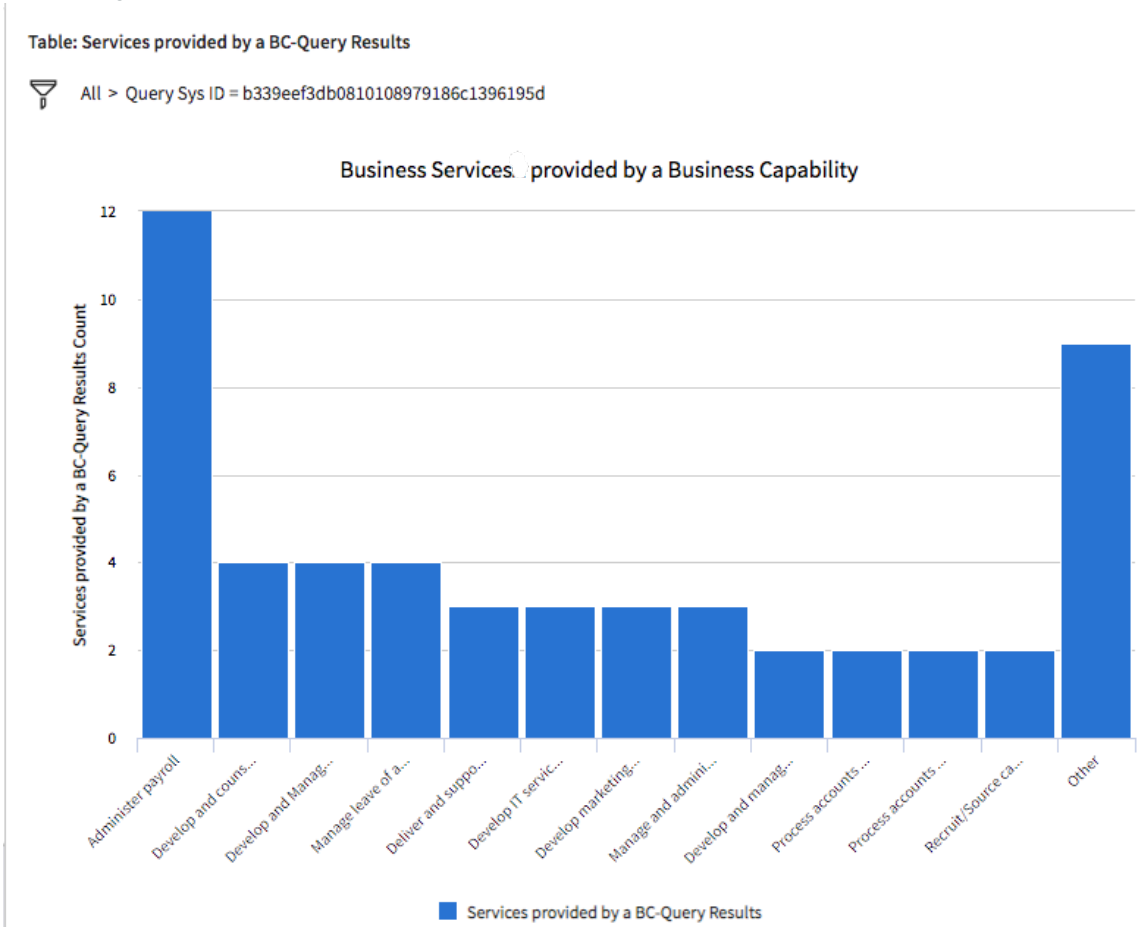
Report showing business services provided by a business capability



Business Applications using an Information Object

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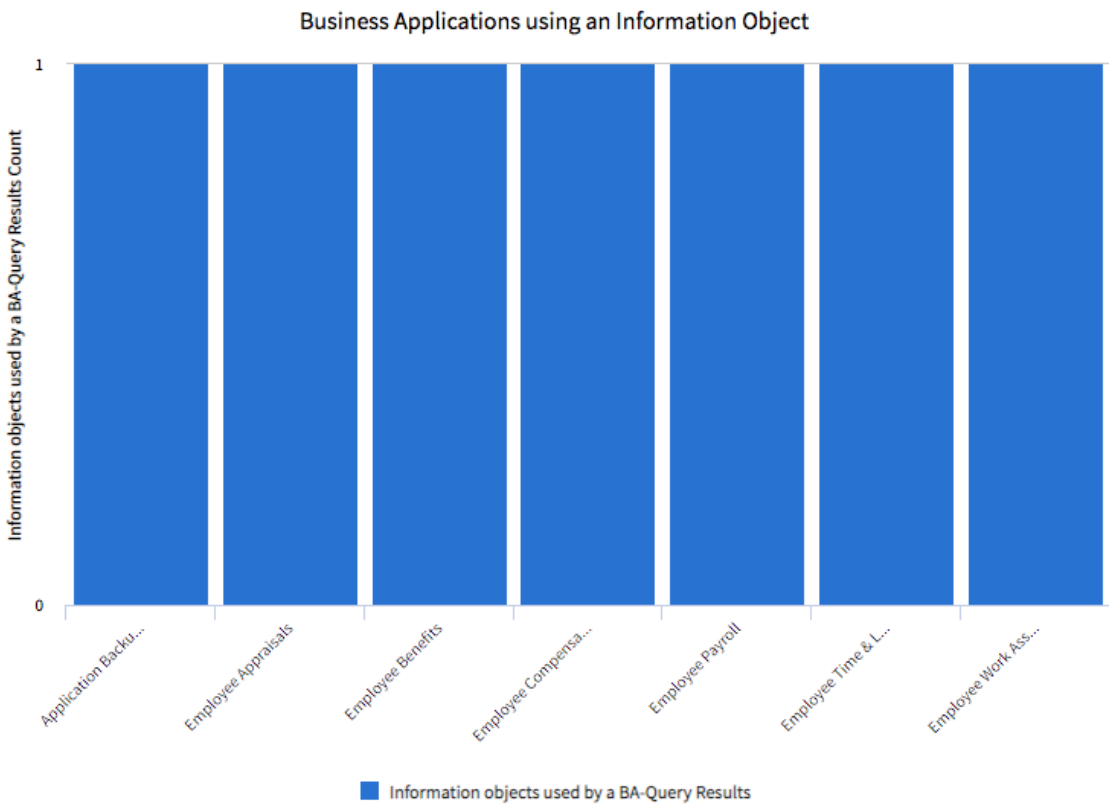
Report showing business applications using an information object

Table: Information objects used by a BA-Query Results

All > Query Sys ID = 3eaf6af7db0810108979186c1396194e



Information Objects used by a Business Application

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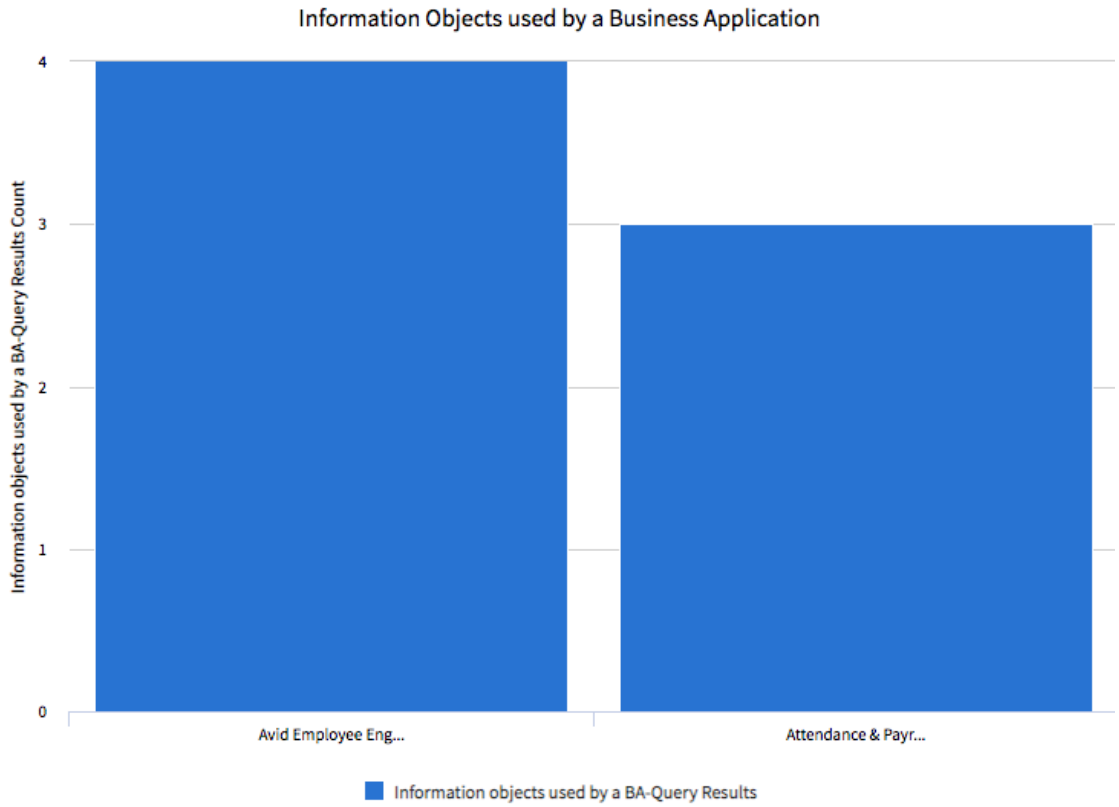
Report showing information objects used by a business application

Table: Information objects used by a BA-Query Results

All > Query Sys ID = 3eaf6af7db0810108979186c1396194e



Demands on a Business Application

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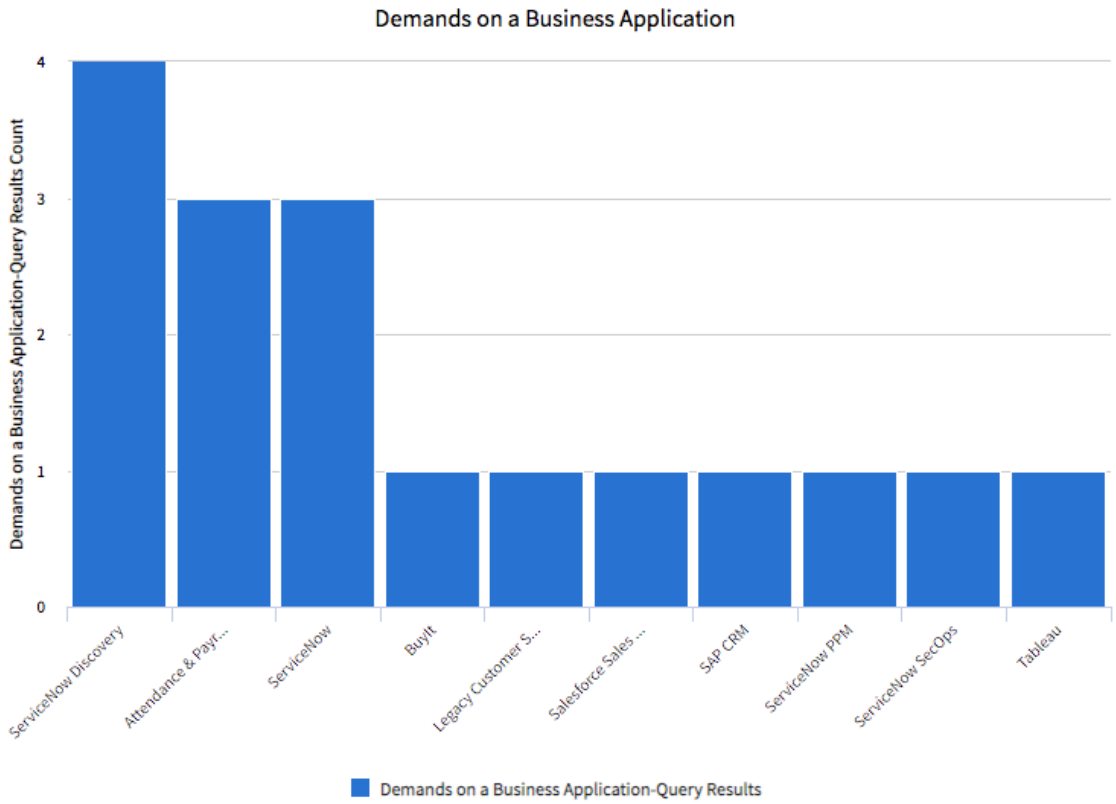
Report showing demands on a business application

Table: Demands on a Business Application-Query Results

All > Query Sys ID = 0eefe6f31b8810107a0bfd961a4bcbc6



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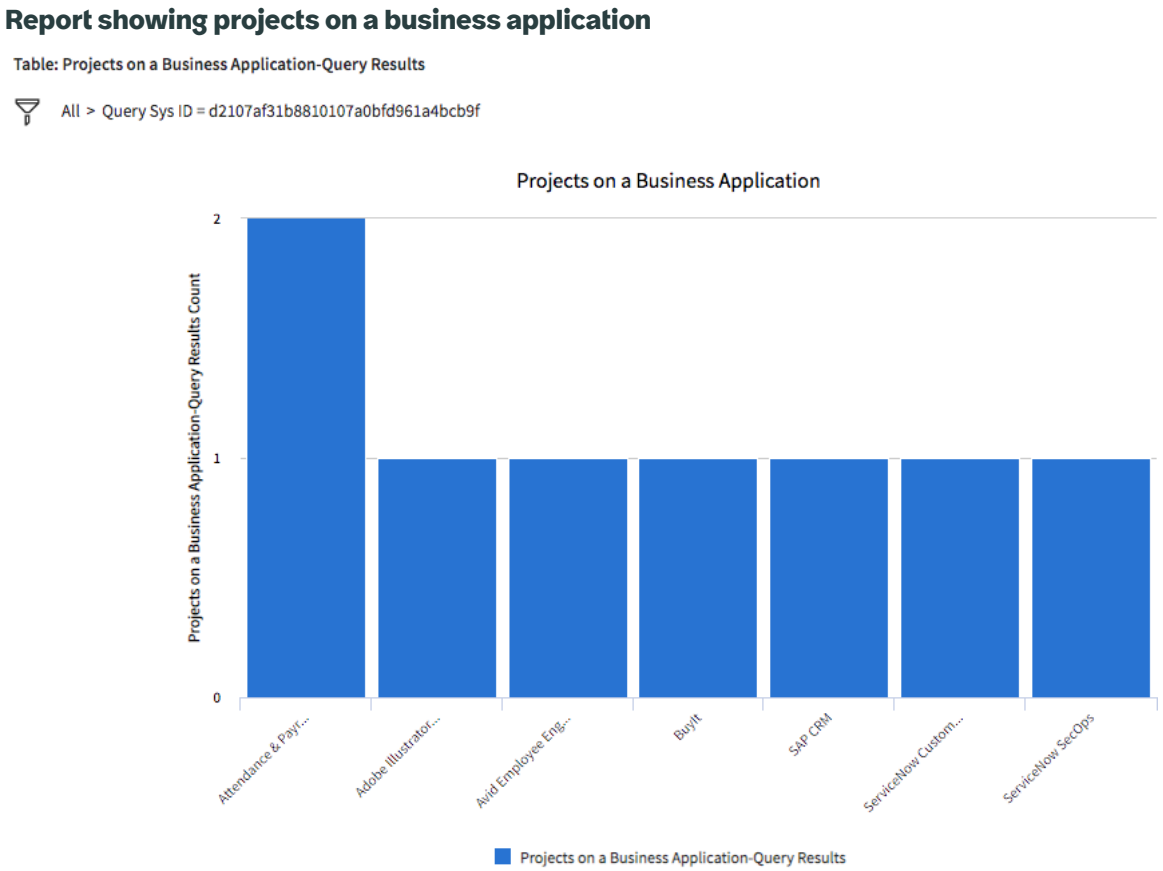
Projects on a Business Application



Related topics

Run scheduled jobs for CMDB Query Builder reports

Export data to Microsoft PowerPoint

Export the Application Portfolio Status data to Microsoft PowerPoint. Share the data with other stakeholders in the organization, like business owners, managers and solution architects.

Before you begin

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

Role required: sn_apm.apm_user

Procedure

1. Navigate to **All** > **Application Portfolio Management** > **Application Portfolio Analysis** > **Export to PowerPoint for APM**.
2. Select a template from the drop-down list.
   The APM Report template is provided from the base system.
3. Click **Download**.

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Result
A PowerPoint deck with the Application Portfolio Status details is downloaded.

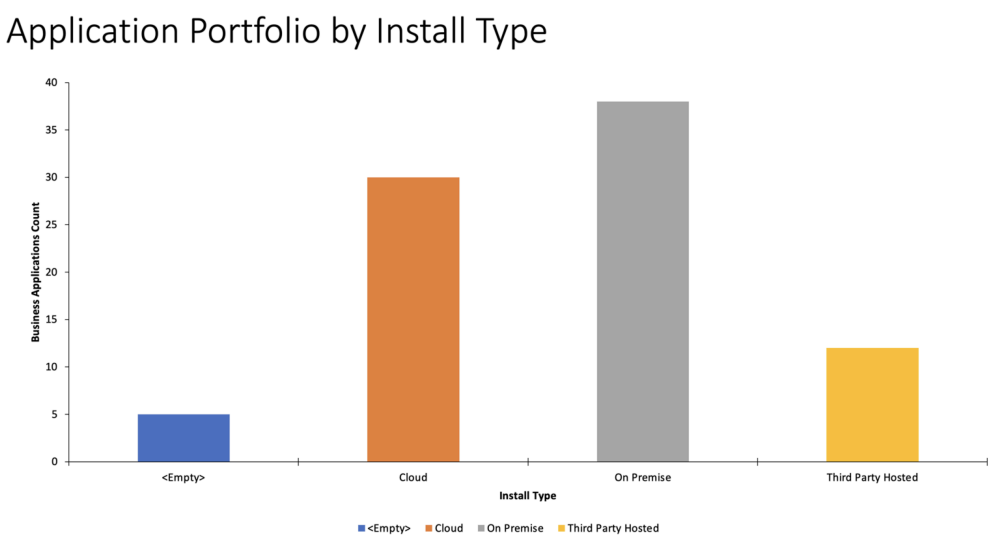
Application landscape reports

When you export the Application Portfolio Status data to Microsoft PowerPoint, the following Application Landscape report types are exported to the PowerPoint deck.

Application Portfolio by Install Type

The Application Portfolio by Install Type report shows a graphical representation of the number of applications installed and the type of installation, such as Cloud, On premise, and so on.

Application Portfolio by Install Type



Application Portfolio by Platform

The Application Portfolio by Platform report shows a graphical representation of the number of applications categorized by their platform type, such as AWS, Microsoft Azure, ServiceNow, and so on.

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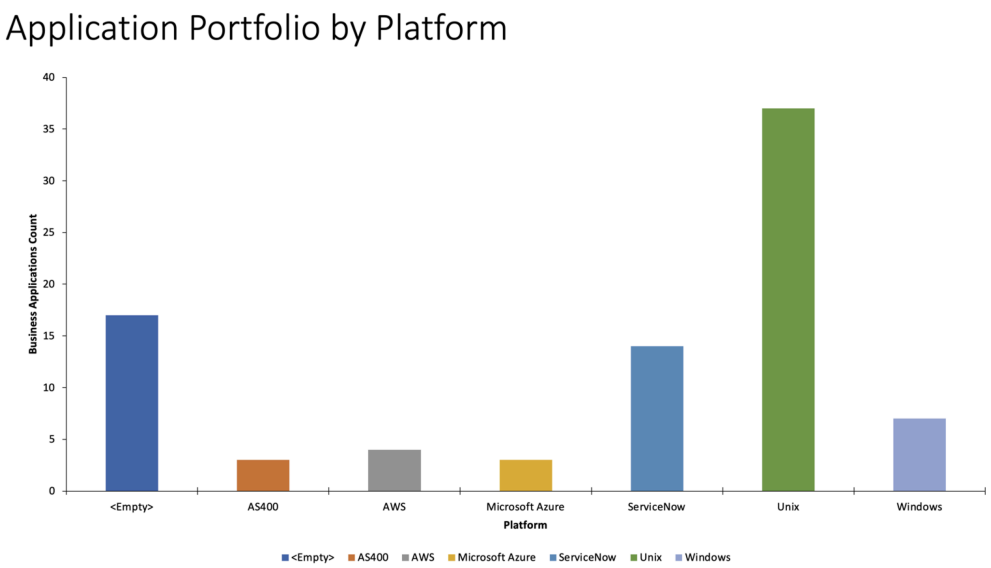
Application Portfolio by Platform

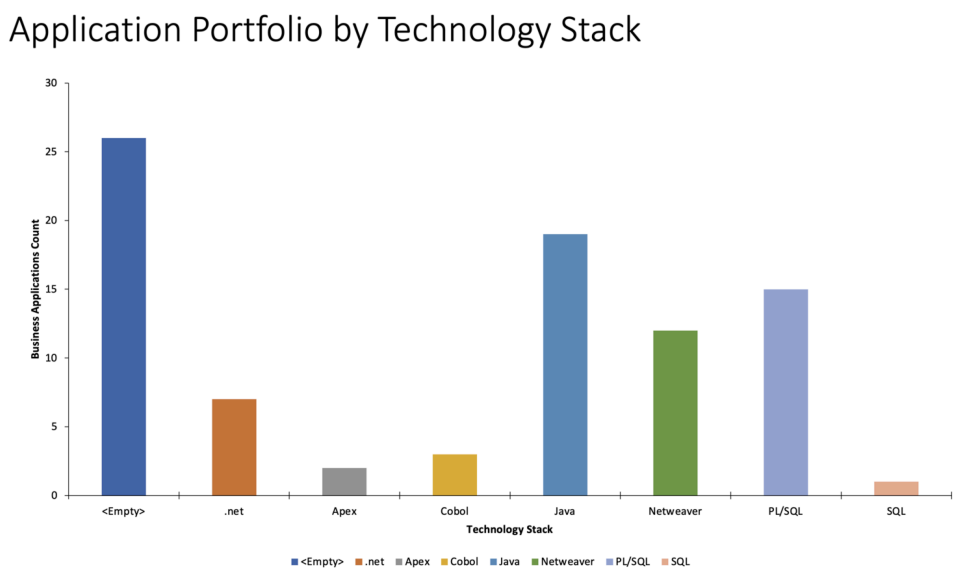


Application Portfolio by Technology Stack

The Application Portfolio by Technology Stack report shows a graphical representation of the number of applications categorized by their technology, such as Java, SQL, and so on.

Note:
The applications with no technology stack are displayed as <Empty>.

Application Portfolio by Technology Stack



Application Portfolio by Category

The Application Portfolio by Category report shows a graphical representation of the number of applications and their categories, such as Customer Support, Finance, Marketing, and so on.

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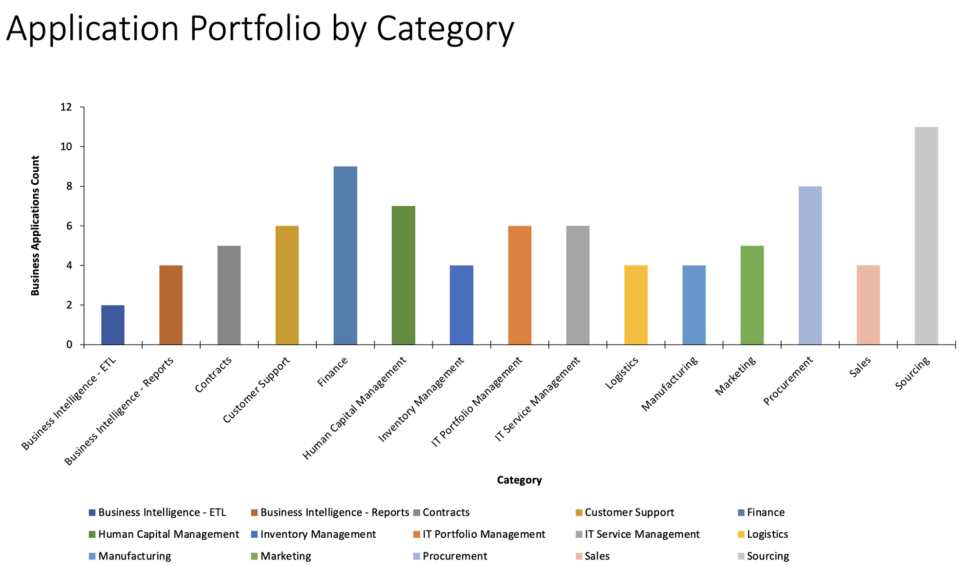
Application Portfolio by Category

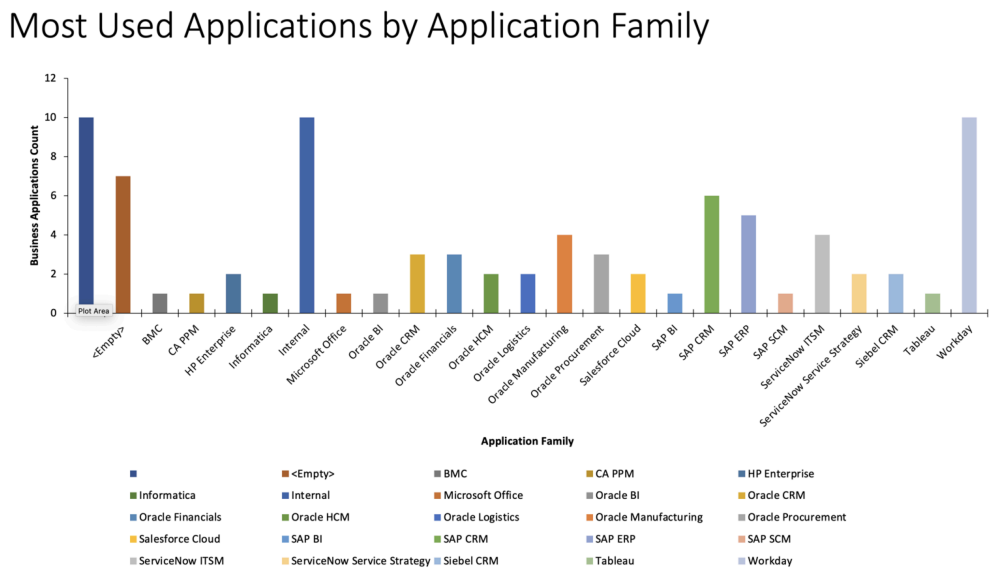


Most Used Applications by Application Family

The Most Used applications by Application Family report shows a graphical representation of the number of applications categorized by their organization, such as BMC, Microsoft Office, SAP BI and so on.

Note:
Currently, the Application Portfolio by Application Family report displays 30 categories. Out of these 30 categories, 29 stacks show category names, and 1 stack is displayed as others (cumulative of remaining applications).

Most Used applications by Application Family



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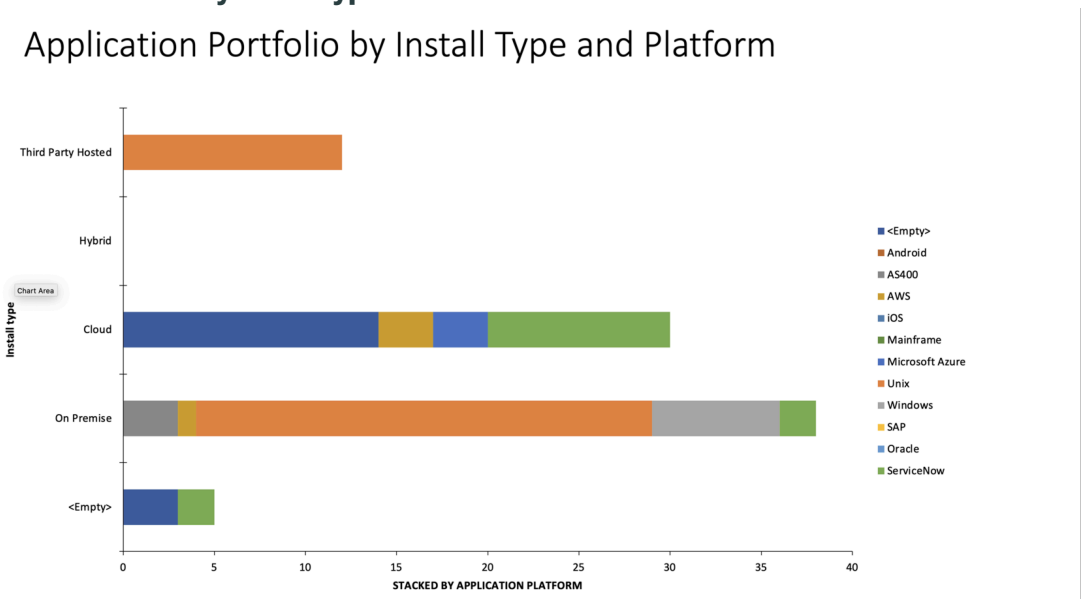
Application Portfolio by Install Type and Platform

The Application Portfolio by Install Type and Platform report shows a graphical representation of the number of applications and their install type, stacked by their platform.

Application Portfolio by Install type and Platform



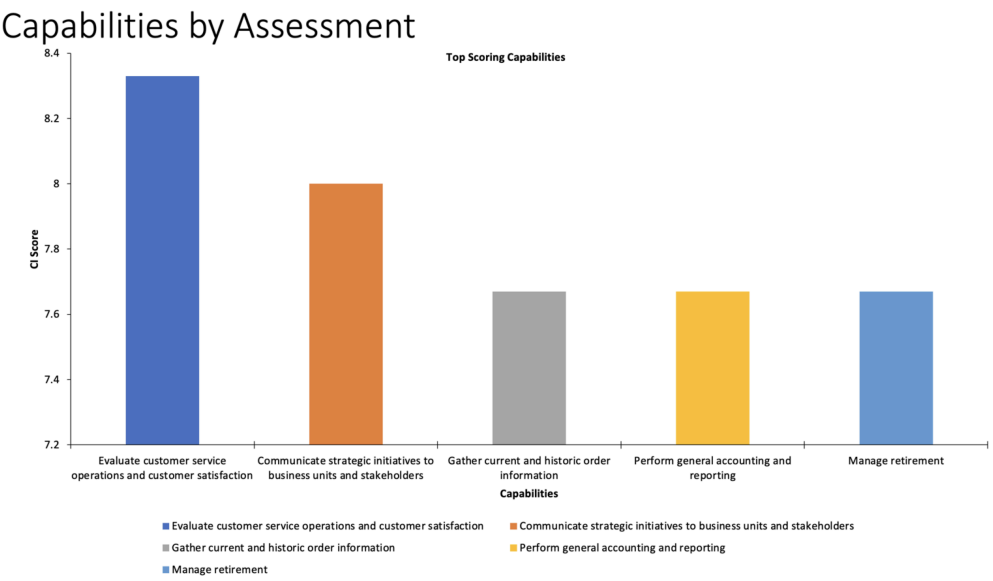
Capabilities landscape reports

When you export the Application Portfolio Status data to Microsoft PowerPoint, the following Capabilities Landscape report types are exported to the PowerPoint deck.

Capabilities by Assessment (Top Scoring Capabilities)

The Capabilities by Assessment (Top Scoring Capabilities) report shows a graphical representation of the five top scoring capabilities of the organization.

Capabilities by Assessment (Top Scoring Capabilities) graph



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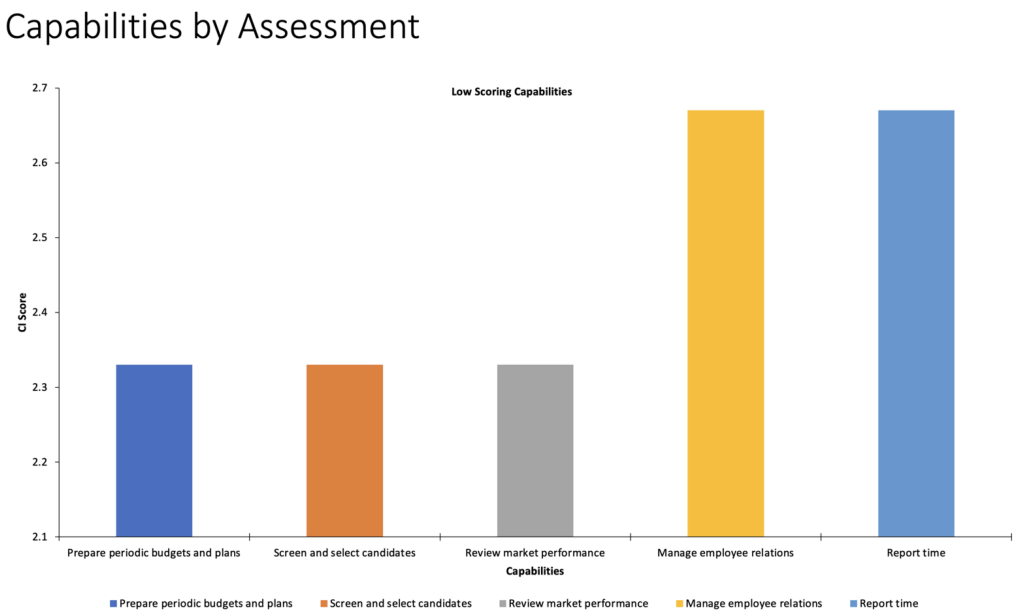
Capabilities by assessment (Low Scoring Capabilities)

The Capabilities by Assessment (Low Scoring Capabilities) report shows a graphical representation of the five low scoring capabilities of the organization.

Capabilities by assessment (low scoring capabilities)



Connect a digital interface with CMDB API in APM

Create a relationship between a digital interface and a CMDB API. Use this relationship to find out the digital integration and API connection details and view the APIs that are created from the design specs of the digital interface. You can also find out the environments where the APIs are deployed, and group them as required.

Before you begin

Activate the CMDB CI Class Models [app-cmdb-content] store app (version 1.49.0 or later). For instructions, see CMDB CI Class Models store app.

Role required: sn_apm.apm_analyst

About this task

One digital interface can be connected to one or more APIs. One API can be connected to only one digital interface.

Procedure

1. Navigate to **All** > **Application Portfolio Management** > **Application Portfolio** > **Digital Interfaces**.
2. Select an existing digital interface.
3. Select the **APIs** tab in the digital interface form.
4. Select **New**.
   On the Digital Interface to API form, fill in the fields. For field descriptions, see Digital interface to API form in APM. Information for the fields Environment, Lifecycle Stage, and Lifecycle Stage Status are derived from the API.
5. Select **Save**.

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Integrating Application Portfolio Management with other applications

Understand the process required to set up Application Portfolio Management to work with key applications in the ServiceNow platform to provide a deep insight into the applications.

Integrate with Governance, Risk, and Compliance to identify application risks and controls

Application Portfolio Management (APM) integrates with Governance, Risk, and Compliance (GRC) to help identify and assess risks on business applications.

Before you begin

Role required: admin

About this task

Using GRC application, you can analyze the risks associated with assets such as hardware, software, and business application. You can also identify and test controls associated with those risks as well as look at the audits that were conducted on those assets. This analysis helps the application owners to understand the risk of the business application effectively.

The application owner can identify significant risks and compliance issues that the business applications are exposed to, without having to engage an external auditing system and run the applications through the auditing process.

Activate the following plugins to integrate APM with GRC.

Procedure

1. Navigate to **All** > **System Definition** > **Plugins**.
2. Install the GRC: GRC Profile Dependencies (com.snc.grc_profile_dep) plugin.
3. Install the GRC: Vendor Risk Management Dependencies (com.snc.grc_vrm_dep) plugin.
4. Install GRC: Policy and Compliance Management Dependencies (com.snc.grc_policy_dep) plugin.

   This also requires installation of app-compliance from the ServiceNow app store.

   Note:
   The integration also requires certain applications that should be installed from the ServiceNow app store. See Request apps on the Store for instructions to download and activate them.

What to do next

Create an entity referencing the business application. Attach the entity to an audit.

Create an entity for audit referencing business application

Create an entity with reference to the business application table and its specific application record. Use the entity to scope risk exposure and perform risk assessments on business applications.

Before you begin

Role required: sn_audit.admin or sn_audit.manager

About this task

GRC uses the term, **entity**, instead of profile. An entity can be anything such as a database, server, or a business application that can be audited.

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Procedure

1. Navigate to **All** > **Audit** > **Scoping** > **All Entities**.
2. Click **New**.
3. On the form, fill in the fields.
   For field information, see Entity Form.
4. Click **Submit**.

   For more information, see:

   - Create a profile.
   - Establish profile types, profile classes, and profiles.

Associate a risk to the entity

Attach the entity to a risk and create a risk record. Assess and identify risks that can adversely affect your business applications.

Before you begin

Role required: sn_risk.admin and sn_risk.manager

Procedure

1. Navigate to **All** > **Risk** > **Risk Register** > **All Risks**.
2. Create a risk in the Risk form.

   See: Create a risk manually.

   Note:

   Relate the risk to the entity in the **Entity** field.

Add business application entity to an engagement

The entities are assessed and evaluated for audit engagement. After which the entities that are scoped for audit engagement and validated are associated to an audit.

Before you begin

Role required: sn_audit.manager or sn_audit.admin

To add a business application entity to an engagement, you should have created an entity referencing the business application in the **Entity** field of the Entity form. See: Create an entity for audit referencing business application.

Procedure

1. Navigate to **All** > **Audit** > **Engagements** > **All Engagements**.
2. To add the business application entity to the engagement, click **Add** button in the **Entities** related list.

   Note:
   The engagement must be in **Scope** or **Validate** state.

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See: Add profiles to an engagement scope.

When an application profile is attached to an engagement, an engagement record with the associated profile is created in Profile to Engagements [sn_audit_m2m_profile_engagement] table.

Add a control to the business application entity

Associate a control to a business application entity that might be at risk. It is mandatory that you set effective control on the business applications to mitigate risks and protect your business. As you upgrade your business applications, you can replace your outdated controls.

Before you begin

Role required: admin

You should have created an entity before associating a control to it. Controls are created in GRC.

Procedure

To create a control and add an entity to the control, see Create a control.

- The entity that you select from the Controls [sn_compliance_control] table must be a business application and the entity **Class** of the record must be application.
- The control record can be either in the **Draft** or **Retired** state. However, controls in such states are not visible in Application Portfolio Management to be associated to a business application.

View Governance, Risk, and Compliance risks and engagements for business application

As an application owner, you can view the risks that a business application is exposed to. Governance, Risk, and Compliance (GRC) audits the business application entity and the audited risks and engagements are captured as scripted related lists in the business application form.

Before you begin

Role required: sn_apm.apm_user, sn_apm.business_stakeholder_apm_user

Procedure

1. Navigate to **All** > **Application Portfolio Management** > **Application Portfolio** > **All Business Applications**.
2. Click **GRC Risks** related item.
3. View the name of the risk statement, its description, the category of risk (legal, financial, operational, and so on), inherent impact that indicates the levels of risk, and inherent likelihood that indicates the likelihood of the risk occurring.
   See: Manage risks, risk statements, and risk frameworks
4. Click **Engagements** related item.
5. View the name of the engagement, the user to whom it is assigned, the state in which the engagement is, planned start date on which the activity should begin, its end date, the percentage of engagement completed, and the actual cost of the engagement.
   See: Manage engagements
6. Click **Controls** related item.
7. View the name of the control, its owner, status of the control whether it is compliant or not, the classification of the control whether it is preventive, corrective, or detective, and the attestation frequency at which the scheduled job runs.

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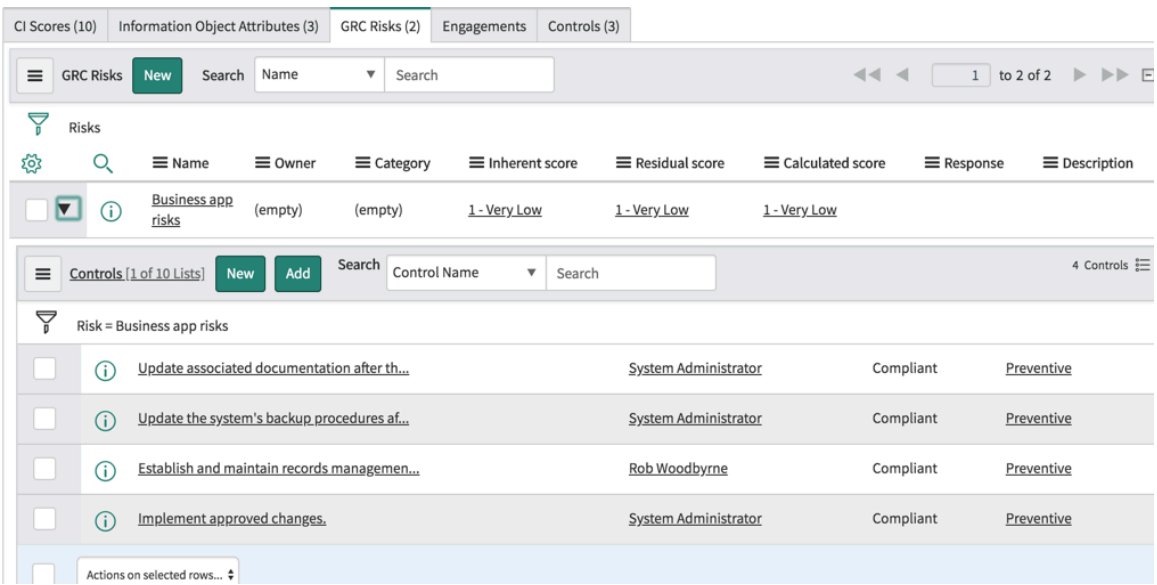
See: Manage controls

8. Click display/hide hierarchical lists arrow beside a risk record in the GRC Risks related list to view all the controls that you have associated to the risk of the business application.

   When you associate a control to a risk, the control with its associated risk is created in Risk to Control [sn_risk_m2m_risk_control] table.

Controls associated to a risk



Use similarity solution to categorize applications and integrate with service catalog

Use the machine-learning engine to suggest a category for a business application that you are registering into the APM inventory.

Before you begin

Role required: sn_apm.apm_user

About this task

Using the Register a Business Application form to on-board an application in APM is similar to requesting an item from Service Catalog category.

Procedure

1. Navigate to **All** > **Application Portfolio Management** > **Business Application Lifecycle Management** > **Business Application Catalog**.
2. Click the **Register a Business Application** card to register a new business application.
3. Enter the details in the Register a Business Application form.

   Mandatory fields have a red asterisk (*) beside them.

Register a Business Application form

Field	Description
Enter the name of the business application	Name of the business application that you are requesting or registering.

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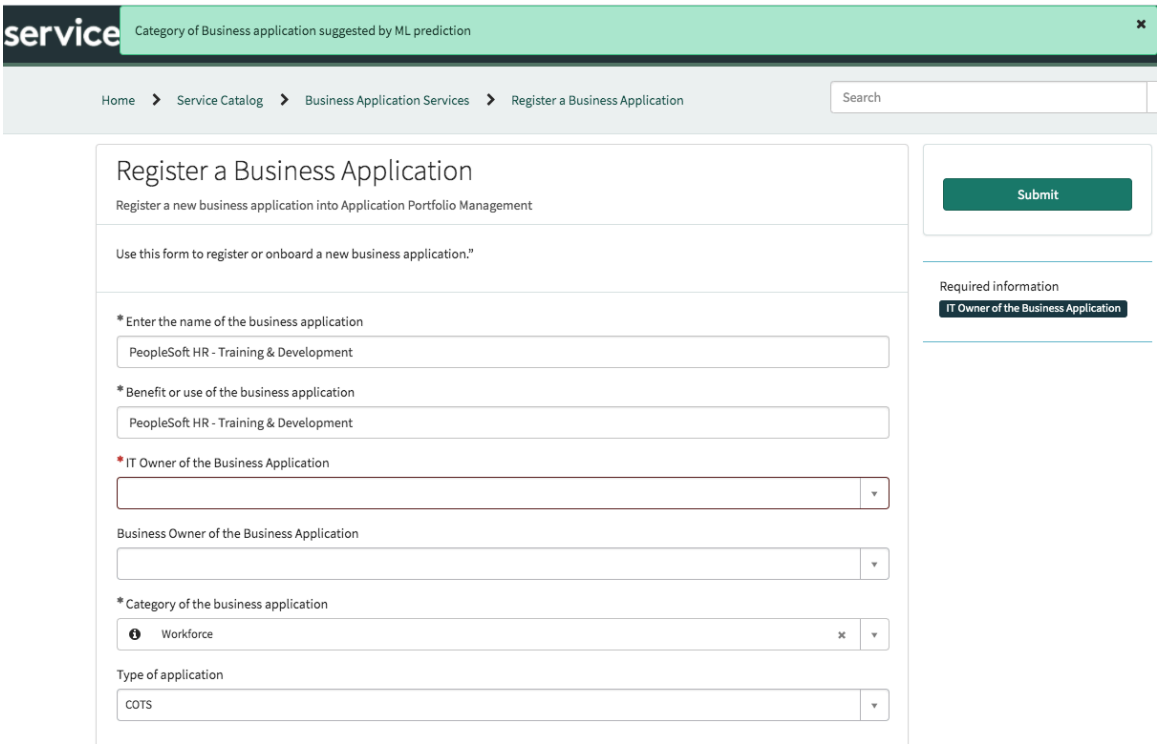
Field	Description
Benefit or use of the business application	Purpose of the business application.
IT Owner of the Business Application	Name of the IT owner of the application.
Business Owner of the Business Application	Name of the business owner of the application.

Register a business application



As you enter the name and the benefit of the business application, the similarity solution of the machine-learning algorithm is triggered to search for a similar business application from the business applications table [cmdb_ci_business_app]. Once the engine finds similar records, you can see a message on top of the form indicating that the ML found similar records in the applications table. Based on the findings the engine suggests a category for the application that you are registering. It also displays the suggested category in the **Category of the business application** field under which the business application can possibly be grouped.

If you choose to select the category predicted and suggested by the machine-learning solution, then the application category is stored in the **ML Predicted Category** field of the Business Application Requests table [business_app_request] for future analysis.

4. Select the ML suggested category if it is suitable.
5. Click **Submit**.

Application Portfolio Management (APM) integration with Lucidchart

Create enhanced architectural diagrams for your Business Applications and Business Capabilities in Lucidchart and access them from your ServiceNow instance.

You can model your organization's architecture in a visual way, by including the current and future state in the Lucidchart application. You can then associate these diagrams to Architectural Artifacts in APM.

As an Enterprise Architect, use the integration to perform the following tasks:

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- Push a Business Application hierarchy to Lucidchart.
  - Select the entities to be included in the chart.
  - Customize the shapes and colors of the entities how they appear in the chart.
  - Keep a reference of the diagram as an Architectural Artifact version.
  - View and edit the diagrams in Lucidchart.
- Push Business Capabilities maps to Lucidchart.
  - Select one or more capabilities including their child capabilities and business applications to include in the chart.
  - Keep a Lucidchart reference of the diagram as an Architectural Artifact version.

The Lucidchart integration enhances the Architectural Artifacts functionality to associate a Lucidchart diagram as a URL for an artifact. The current integration works only one way to push the diagrams from the ServiceNow instance and model them in Lucidchart.

To create a diagram in Lucidchart and associate it with an Architectural Artifact in Application Portfolio Management, you must install the following store applications from ServiceNow Store:

- Lucidchart diagramming spoke - Helps to establish a connection between ServiceNow and Lucidchart. It provides an action to create Lucidchart diagrams in Application Portfolio Management. The Lucidchart Diagramming spoke requires creating a workspace and custom app in your Lucid account to generate OAuth 2.0 tokens to authenticate ServiceNow requests. Also, you must create a connection and credential record for the Lucidchart application to authorize the create diagram action from Application Portfolio Management. For detailed information, see Lucidchart diagramming spoke, Create OAuth 2.0 Client in Lucidchart, and Create a connection and credential alias for the Lucidchart diagramming spoke.
- Lucidchart Integration – Helps to create Business Application or Business Capability diagrams in Lucidchart. You can also configure the shapes and colors of the entities to appear in Lucidchart. Install the application from ServiceNow Store

Install Application Portfolio Management integration with Risk Management and Application Portfolio Management integration with Policy and Compliance

Install Application Portfolio Management integration with Risk Management and Application Portfolio Management integration with Policy and Compliance from the ServiceNow Store.

Before you begin

Role required: admin

Before installing Application Portfolio Management integration with Risk Management and Application Portfolio Management integration with Policy and Compliance, download and activate the Governance, Risk, and Compliance (GRC) application from the ServiceNow Store. For more information, see the Download a GRC application from the ServiceNow Store for the first time topic.

About this task

Activate the following plugins:

Name	Description
Application Portfolio Management integration with Risk Management (com.snc.apm_risk_assessment)	Activates the Application Portfolio Management integration with the GRC Risk Management plugin.

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Name	Description
Application Portfolio Management integration with Policy and Compliance (com.snc.apm_control_management)	Activates the Application Portfolio Management integration with the GRC Controls plugin.

Procedure

1. Navigate to **System Applications** > **All Available Applications** > **All**.
2. Find the application using the filter criteria and search bar.
   You can search for the application by its name or ID. If you cannot find an application, you may have to request it from ServiceNow store.

   Visit the ServiceNow Store website to view all the available apps and for information about submitting requests to the store. For cumulative release notes information for all released apps, see the ServiceNow Store version history release notes.
3. Click **Install**.
4. In the Application installation dialog box, review the application dependencies.

   Dependent plugins and applications are listed if they will be installed, are currently installed, or need to be installed. If any plugins or applications need to be installed, you must install them before you can install GRC - Application Risk Assessment.
5. **Optional:** If demo data is available and you want to install it, click **Load demo data**.

   (Optional) Demo data comprises sample records that describe application features for common use cases. Load demo data when you first install the application on a development or test instance.

   Important:
   If you don't load the demo data during installation, it's unavailable to load later.
6. Click **Install**.

Governance, Risk, and Compliance (GRC) roles required for Application Portfolio Management (APM)

Add roles to the sn_apm.apm_user role to be able to access GRC information from APM.

Role	Description
risk_reader	Enables read access to the GRC Risks, Risk Summary, and Risk Response Tasks tabs.
compliance_reader	Enables read access to the Controls, GRC Issues, and GRC Issue Remediation Tasks tabs.
sn_audit.user	Enables read access to the Audit Engagements tab.
grc_business_user	Enables an application owner to respond to a risk assessment questionnaires and control attestation surveys.

For information on how to assign a role to a user, see the Assign a role to a user topic.

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Application Portfolio Management reference

Reference information to provide additional details about Application Portfolio Management such as the fields, user roles, tables, guidelines, and domain separation information.

Business stakeholder role for APM

For APM users, Business Stakeholder (com.snc.business_stakeholder) plugin contains the business stakeholder role for APM. Users with this role can approve, view or read records of tables that are used to retrieve data for reports and dashboards. Customers can assign this role to any user who is a business stakeholder to review and approve reports.

Upgrade information

Upgrade customer

If you are upgrading to Washington DC, the business stakeholder role for APM is available only when you activate Read only roles for Application Portfolio Management (com.snc.apm_read_roles) plugin.

New customer

If new customer, the Read only roles for Application Portfolio Management (com.snc.apm_read_roles) plugin is activated on zBoot. However, the business stakeholder role for APM is available only when you install APM plugin.

Why business stakeholder read-only role

Analyst (sn_apm.apm_analyst) role in Application Portfolio Management is a licensable role that requires subscription. Users with this role can access all APM PA dashboards and this role contains APM administrator role who has different levels of access not only to read but to approve and update information data. Organizations procure this licensable role in limited numbers as it comes with a price. Business stakeholder role comes with a similar function but access is controlled at read-only level. Users with this role can access reports to review and approve only.

Share dashboards with business stakeholder read-only users

APM users with Business stakeholder role for APM (sn_apm.apm_read) role have read-only access to dashboards and reports and all the underlying tables of the dashboards.

The base system provides access to users with this role to view **Application Landscape**, **Application 360**, and **Application Assessments** dashboards. You can also access all the tables from where the data are retrieved for these dashboard reports.

However, you can also configure your custom-created dashboards and reports to provide users with business stakeholder role. To provide read-only access to a business stakeholder, follow the steps in Share a responsive dashboard

Share widgets in dashboards with business stakeholders

To share individual widgets in the dashboard with the user who has the business stakeholder read-only role,

1. Navigate to **Application Portfolio Management** > **Application Portfolio Analysis** > **Dashboard**
2. Click the add widgets icon ( ).
3. Click the edit content icon ( ) of the widget that you want to share.

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4. Click the sharing icon ( ).
5. Click the **Share** option in the Sharing section.
6. Search for business_stakeholder in the search field and click to add the role in the Sharing settings window.
7. Click **OK**.

APM tables accessible to users with business stakeholders role

Users with Business stakeholder role for APM can access the following tables that store the data to load the widgets in the APM dashboards:

APM tables

Label	Table name
Business Application	cmdb_ci_business_app
Business Capability	cmdb_ci_business_capability
CMDB Relationship	cmdb_rel_ci
CI Score	apm_app_score
Indicator Score	apm_app_indicator_score
Indicators	apm_metric
Fiscal Year	fiscal_period
Business Process	cmdb_ci_business_process
Application Family	apm_application_family
Application Category	apm_application_category
Application Category Groups	apm_application_category_group
Scoring Profiles	apm_application_profile
Portfolio	pm_portfolio

Application Classification Example

An example of the application classification into groups and categories to identify relationships and redundancies.

Scenario using Application Classification

The following table displays an example in which applications are classified on the basis of category, family, and software products.

Business Application	Business Process (L1)	Application Category Group	Application Category	Application Family	Software Products
Oracle EBS Order Management	Quote to Cash	Sales and Distribution	Order Management	Oracle EBS SCM	Oracle EBS R12.2 Order Management

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Business Application	Business Process (L1)	Application Category Group	Application Category	Application Family	Software Products
Oracle EBS General Ledger	Financial Plan to Report	Financials	General Ledger	Oracle EBS Financials	Oracle EBS R12.2 Financials

Related topics

Application classification

Business Process Form

A Business process is a method of related structured tasks performed to complete a specific application service.

Business Process Form Fields

Field	Value
Name	Unique name for the business process.
Asset tag	Alphanumeric tag assigned by the organization to the asset.
Assigned to	Person using or responsible for the item.
Category	Category of the business process.
Fault count	Number of faults.
Installed	Date and time when the business application is installed.
Install Status	Status of the business application. Choice list include: • Absent • In Maintenance • In Stock • Installed • On Order • Pending Install • Pending Repair • Retired • Stolen • None

Related topics

Add or edit an application business process

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Demand Actions Form

Demand actions are strategic decisions that you want to execute for an application. Application Portfolio Management provides preconfigured actions that help you enhance the capability of the applications.

Demand Actions Form Fields

Demand Actions form

Field	Description
Action	Decision taken on the application.
Description	Description of the action.
Strategy	Plan to implement the action.

Related topics

Add a strategy for managing applications

Certification Schedule form

A system administrator with APM admin role can create and assign data certification tasks to the system owners for certifying business application data.

Certificate Schedule form fields

Field	Description
Name	Name of the certification schedule.
Filter	Select a filter for the table data.
Table	The table consisting the data that is to be certified. Defaults to cmdb_ci_business_application table. **Note:** Data certification can be applied only on one table at a time. Create another table if you require data certification on that table.
Display fields	Select the fields to be displayed from the business application. **Note:** Display fields cannot be the same as Certification fields. They are mutually exclusive.
Certification fields	Select fields to be displayed that require individual field certification. Specify the fields that you want to be certified.

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Field	Description
	Application URL, **Business criticality**, **Data classification**, **Contract end date**, **Active**, **Active user count**, **Status**, **User base**, and **Last change applied date** are some of the fields preconfigured for data certification.
Assignment type	Select a user reference field from the target table. • **User field**: Select and assign a specific field in the Business application table in the **Assign to** field. • **Specific User**: Select and assign a specific user in the **User** field. • **Group Field**: Assign the certification schedule to a group in the **Assign to group** field. • **Specific Group**: Select and assign the certification schedule to a group in the **Group** field.
Assign to	Owner of the application who is responsible for certifying the data of the business application.
User	Select a user to whom all the unassigned tasks will be assigned to.
Assign to group	Select a group from the business application table.
Group	Select a group from the choice list.
Assign to empty	Select a value from the choice list: • **Do Not Create Task**: Certification task is not created for these records. • **Create Unassigned Task**: Certification task is created but is unassigned. • **Create Assigned Task**: Certification task is created and assigned to the specific user or group. **Note:** The field is available only when you select the **Assignment type** as **User Field** or **Group Field**.
Days to complete	Enter the number of days by which you require the certification to be completed.
Active	The job is inactive by default. Select the check box to run the scheduled job.

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Field	Description
Run	Frequency with which the certification task is performed: Daily, Weekly, Monthly, Periodically, Once, On Demand.
Last run date	Defaults to the prior date when the certification was run. The field cannot be edited if the certification schedule is a new record.
Task description	Brief description of the certification task.
Instructions	Detailed instruction to the application owner about the task.

Certification Instances section fields

Field	Description
Number	Number of the certification instance.
Certification Schedule	Defines the information that requires certification and the frequency of execution. Defaults to the certification schedule that you selected.
State	Status of the certification: **Work in Progress** or **Complete**.
Created	Created date of the certification instance.
Complete by	The date on which the certification task is to be completed. **Days to complete** is added to the **Created** date.
Percent complete	For each field (out of the total number of certification fields) that the application owner certifies the percent is calculated. The system administrator can track the progress of the data certification task.
Short description	Brief description of the certification instance.

Certification Tasks section fields

Field	Description
Number	Number assigned to the certification task.
Assigned to	Owner of the application to whom the task is assigned and who is authorized to certify the data.
Assignment group	Task can also be assigned to users of a group.
Escalation	Defaults to Normal.

Related topics

Schedule a data certification task

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Business Application Form

APM helps system admins add any business application to assess and track its costs, usage, business value, functional fitment, and risks.

Business Application Form fields

Field	Description
Name	Name of the business application.
Number	Unique, auto-generated identification number with a configurable prefix for the business application record.
Business process	Business process for which the application is used.
Portfolio	Name of the portfolio to which the application belongs. This field appears when you activate the PPM Standard (com.snc.financial_planning_pmo) plugin.
Application type	Type of application. This field indicates whether the application is custom or commercial. • **Homegrown**: Application that is built in-house. • **End-user computing**: The application is used by end users to perform their daily tasks. • **Commercial off-the-shelf (COTS)**: Application is a commercial application purchased from another company. • **SaaS**: Application is a cloud application managed by third-party vendor.
Publisher	Name of the application publisher.
Architecture type	Type of application architecture. • **Client Server**: Application structure that divides tasks between the service providers and service requesters. • **N-Tier**: A multi-layered architecture where presentation, processing, and data management exist as physically separate layers. • **Web-based**: Applications accessed over a network connection. • **Other**: Any other type of architecture. • **Platform Host**: Hardware or software that hosts the business application. • **Platform Application**: Application that runs on a platform and can be associated to a host. In this case, the business application relies on the platform for standard operations such as development tools, execution services, and data services.
Platform Host	A hardware or software that hosts the business application. This field is required if you select the **Platform Application** value in **Architecture type** field.

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Field	Description
Install type	Type of install. Use the following options: • **On-Premises** • **Cloud** • **Hybrid** • **Third Party Hosted**
Platform	Applications hosted by platform.
Business Unit	Business unit that is associated with the selected business application.
Department	Department that is associated with the selected business application.
Installed	Date and time when the application was installed.
Status	Operational status of the application. Use the following options: • Implementing • In Production • Pilot • Retired Auditing is enabled. Thus, whenever a user updates the value in this field, the **Activities** field in the **Activities** tab displays the update.
Life-Cycle Stage	Life-cycle stage of the application. This field is auto-populated based on the value selected in the **Status** field. The data is fetched from the life-cycle mapping [life_cycle_mapping] table.
Life-Cycle Stage Status	Status of the life-cycle stage of the application. This field is auto-populated based on the value selected in the **Status** field. The data is fetched from the life-cycle mapping [life_cycle_mapping] table.
Application scoring profile	The profile used to calculate the application score for strategy.
Application category	The application purpose and function. Use this information to rationalize or consolidate applications.
Application family	A set of related applications that have a common platform or vendor.
Technology stack	Technology stack on which the application was built.
User base	Number of users using the applications. Auditing is enabled. Thus, whenever a user updates the record in this field, the **Activities** field in the **Activities** tab displays the update.
Active user count	Number of active users out of the overall user base. Auditing is enabled for the field.
Last change applied date	Date on which the application was last updated. Auditing is enabled for the field.

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Field	Description
Accessibility level	Accessibility level of the business application. Use the following options: • A (lowest) • AA (mid-range) • AAA (highest)
Age in months	Age of the business application in months. This field is auto-populated when the date and time is entered in the **Installed** field.
Description	Unique description of the application.
Model ID	Product model ID of the business application.

Contract section form fields

Field	Description
Vendor	Vendor details of the application.
Support vendor	Vendor who currently supports the application.
Contract end date	Expiry date of the subscription contract or the support contract. Auditing is enabled for the field.

Planned Disposition section form fields

Field	Description
Planned Disposition	Planned disposition of a business application. Use the following options: • Invest • Sustain • Migrate • Retire
Migration Strategy	Migration strategy for the business application. This field appears only when **Migrate** is selected from the **Planned Disposition** field. Use the following options: • Rehost • Replatform • Repurchase • Refactor
Target Business Application	Name of the business application for which you're adding the planned disposition. This field appears only when **Migrate** is selected from the **Planned Disposition** field.

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Planned Disposition section form fields (continued)

Field	Description
Reasoning	Reason for the planned disposition decision.

Owners section form fields

Field	Description
Portfolio manager	Owner of the portfolio, typically from IT. This field appears when you activate the PPM Standard plugin (com.snc.financial_planning_pmo).
Business owner	Person who owns the application from the business side. Every application should have an assigned business owner.
Managed by	User managing the business application.
Managed by group	User group managing the business application.
IT Application owner	Person who owns the application from the IT side. The business application must have an owner assigned to it. If you're designated as the IT Application owner, then you can view all the applications for which you're the owner in the **My Applications** menu.
Last updated by	Person who last updated the application record.
Supported by	User supporting the business application.
Support group	User group supporting the business application.

Compliance section form fields

Field	Description
Business criticality	How critical the application is to the business. Auditing is enabled for the field.
Emergency tier	Actions or plans executed for the application in an emergency situation.
Data classification	Security level for the data in the application. This attribute determines which Governance, Risk, and Compliance (GRC) policies are applicable to the application.

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Compliance section form fields (continued)

Field	Description
	Category of data. The base system provides Internal, Public, Confidential, and Highly Sensitive categories. Auditing is enabled for the field.
Certified	Status of the application that it meets requirements or complies with the policies of your organization.

Activities section form fields

Field	Description
Work notes	Work notes entered by you.

Related topics

Add or edit a business application

Create digital integration form

Use the Create Digital Integration form to create a digital integration between two business applications.

Create Digital Integration form

Field	Description
Subscriber Business Application	Name of the business application that uses the provided interface to consume, exchange, or ingest data to support a business capability. Therefore it's affected by the changes or an outage face connection or data loss. **Note:** Being a provider or subscriber business application, it doesn't refer to the data flow direction (incoming, outgoing, bidirectional). It's managed by the Data Flow Direction attribute.
Subscriber Digital Interface	Name of the digital interface that subscribes for the integration.
Provider Business Application	Name of the business application that provides the digital interface and enables to consume or ingest data. Changes, ownership, and responsibilities of the interface are often connected to the provider.

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Create Digital Integration form (continued)

Field	Description
	Note: Being a provider or subscriber business application, it doesn't refer to the data flow direction (incoming, outgoing, bidirectional). It's managed by the Data Flow Direction attribute.
New Provider Digital Interface	Option to create a digital interface. It's a placeholder digital interface that is related to a provider business application.
Provider Digital Interface	Name of the digital interface. As a digital integration between two business applications or services uses a digital interface (API), you must select an interface related to the provider business application or service.
IT Owner	The owner within the IT organization who owns the digital integration. It can be the same person who owns the parent subscriber business application.
Digital Integration Name	Name of the digital integration. This field is auto-populated when the **Subscriber Business Application**, **Provider Business Application**, and **Digital Interface** fields are selected. You can modify the auto-populated name.
Type	Type of the integration. Use the following options: • Data Integration - use this option when the integration must mainly focus on the exchange of data such as users, groups, locations, configuration items, and departments. • Process Integration - use this option when the integration is about an interaction of transactional data to support a specific process. • User interface Integration - use this option when the integration opens a connection with another application and sends app data via a URL to query the application.
Subtype	Subtype of the integration. This field appears only when **Data Integration** is selected from the **Type** field. Use the following options:

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Create Digital Integration form (continued)

Field	Description
	• Process configuration • Foundation data • Configuration items • Events • Reporting • Sys log
Trigger	How to trigger the integration. Use the following options: • Manual • Scheduled • Process Driven • Event
Interval	Frequency to trigger the integration. Options for the interval are as follows: • Seconds • Minutes • Hours • Days • Weeks • Months • Quarters • Years • On Demand • Real Time
Business Owner	Business owner of the integration.
Description	Description of the digital integration. Describe in detail why the integration is being created between two business applications or between an external service provided interface and a business application and how and what business value it adds.

Related topics

Create a digital integration

Update digital integration form

Use the digital integration form to update the digital integration between two business applications.

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Digital Integration form

Field	Description
Name	Unique and meaningful name of the digital integration.
Number	Number of the digital integration. This field is automatically generated with the DINTG prefix and can't be edited.
Provider Digital Interface	Name of the digital interface. As a digital integration between two business applications or services uses a digital interface (API), you must select an interface related to the provider business application or service. This field is automatically generated and can't be edited.
Provider Business Application	Name of the business application that provides the digital interface and enables to consume or ingest data. Changes, ownership, and responsibilities of the interface are often connected to the provider. **Note:** Being a provider or subscriber business application, it doesn't refer to the data flow direction (incoming, outgoing, bidirectional). It's managed by the Data Flow Direction attribute. This field is automatically generated and can't be edited.
Subscriber Digital Interface	Name of the r digital interface that subscribes for the integration.
Subscriber Business Application	Name of the business application that uses the provided interface to consume, exchange, or ingest data to support a business capability. Therefore it's affected by the changes or an outage face connection or data loss. **Note:** Being a provider or subscriber business application, it doesn't refer to the data flow direction (incoming, outgoing, bidirectional). It's managed by the Data Flow Direction attribute.
Type	Type of the integration. Use the following options: • Data Integration – use this option when the integration must mainly focus on the exchange of data such as users, groups, locations, configuration items, and departments.

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Digital Integration form (continued)

Field	Description
	• Process Integration – use this option when the integration is about an interaction of transactional data to support a specific process. • User interface Integration – use this option when the integration opens a connection with another application and sends app data via a URL to query the application.
Subtype	Subtype of the integration. This field appears only when **Data Integration** is selected from the **Type** field. Use the following options: • Process configuration • Foundation data • Configuration items • Events • Reporting • Sys log
Version	Version of the integration. You can apply a practice of designing, planning, and managing changes to an Integration. You can describe the different changes and capabilities according to version in the **Description** field. It helps Application Owners and Architects to look up which version of an Integration is in use or should change the life cycle.
Life Cycle Stage	Life cycle stage of the integration. Helps to track the life cycles for products, assets, contracts, CIs, locations, and other objects. Using the standard CSDM life-cycle values helps you to track objects through their transitions over time. Reporting can therefore accurately reflect the actual states of CIs: usage, availability, end of support, and so on.
Life Cycle Stage Status	Life cycle stage status of the integration. The state transition of a Digital Integration guides you through the different stages of its life cycle. A life-cycle state is the combination life-cycle stage and life-cycle status of a Digital Integration during the life cycle.
Business Unit	Name of the business unit that the integration belongs to.
Description	Description of the digital integration. Describe in detail why the integration is being created

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Digital Integration form (continued)

Field	Description
	between two business applications or between an external service provided interface and a business application and what business value it adds.

Functional section fields

Data flow direction	Direction of the data flow in the integration. Use the following options: • Outgoing - Data flow from the Provider business application to the Subscriber business application. • Incoming - Data flow from the Subscriber business application to the Provider business application. • Bidirectional - Data flow in both the directions between the Provider and Subscriber business applications.
Trigger	How to trigger the integration. Use the following options: • Manual • Scheduled • Process Driven • Event
Interval	Frequency to trigger the integration. Options for the interval are as follows: • Seconds • Minutes • Hours • Days • Weeks • Months • Quarters • Years • On Demand • Real Time.
Response	Type of the response received by the subscriber. Use the following options:

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Functional section fields (continued)

	• Synchronous • Asynchronous
Interaction type	Type of the interaction between the provider business application and the subscriber business application. Use the following options: • Guaranteed Message • Pub-Sub • Pull • Push
Middleware	Name of the middleware used in the integration.

Business Impact section fields

Field	Description
Criticality	Level of the business impact criticality. Use the following options: • Low • Medium • High • Critical
Confidentiality	Confidentiality level of the integration. Use the following options: • Low • Medium • High • Critical
Integrity	Integrity level of the integration. Use the following options: • Low • Medium • High • Critical
Availability	Availability of the integration. Use the following options:

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Business Impact section fields (continued)

Field	Description
	• Low • Medium • High • Critical

Owners section fields

Business owner	The owner of the business function who owns the digital integration. It can be the same person who owns the parent subscriber business application.
IT owner	The owner within the IT organization who owns the digital integration. It can be the same person who owns the parent subscriber business application.
Supported by	Name of the Subject Matter Expert (SME) or individual who provides support to the digital interface.
Support group	Name of the group that provides support to the digital interface.

Activities section fields

Field	Description
Work notes	Comments about the integration.

Related topics

Update a digital integration

Request digital integration form

Request a digital integration to enable integration between two business applications.

Request a digital integration form

Field	Description
Subscriber Business Application	Name of the business application that uses the provided interface to consume, exchange, or ingest data to support a business capability. Hence it is affected by the changes or an outage face connection or data loss.

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Request a digital integration form (continued)

Field	Description
	Note: Being a provider or subscriber business application it does not refer to the data flow direction (incoming, outgoing, or bidirectional). It is managed by the Data Flow Direction attribute.
Subscriber Digital Interface	Name of the digital interface that subscribes for the integration.
Provider Business Application	Name of the business application that provides the digital interface and allows to consume or ingest data. Changes, ownership, and responsibilities of the interface are often connected to the provider. **Note:** Being a provider or subscriber business application it does not refer to the data flow direction (incoming, outgoing, or bidirectional). It is managed by the Data Flow Direction attribute.
Provider Digital Interface	Option to create a new digital interface. It is a placeholder digital interface that will be related to a provider business application.
Provider Digital Interface	Name of the digital interface. As a digital integration between two business applications or services uses a digital interface (API), you must select an interface related to the provider business application or service.
Digital Integration Name	Name of the digital integration. This field is auto-populated when the **Subscriber Business Application**, **Provider Business Application**, and the **Digital Interface** fields are selected. You can modify the auto-populated name.
IT Owner	The owner within the IT organization who owns the digital integration. It can be the same person who owns the parent subscriber business application.
Business Owner	The owner of the business function who owns the digital integration. It can be the same person who owns the parent subscriber business application.
Type	Type of the integration. Use the following options:

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Request a digital integration form (continued)

Field	Description
	• Data Integration – Use this option when the integration needs to mainly focus on the exchange of data such as users, groups, locations, configuration items, and departments. • Process Integration – Use this option when the integration is about an interaction of transactional data to support a specific process. • User Interface Integration – Use this option when the integration opens a connection with another application and sends app data via a URL to query the application.
Subtype	Subtype of the integration. This field appears only when **Data Integration** is selected from the **Type** field. Use the following options: • Process configuration • Foundation data • Configuration items • Events • Reporting • Sys log
Description	Description about the digital integration. Describe in detail why the integration is being created between two business applications or between an external service provided interface and a business application, And how and what business value it adds.

Related topics

Use Business Application Lifecycle Management to request a digital integration

Application model lifecycle form

The application model lifecycle helps you to better manage lifecycle of a business application.

Application model lifecycle form fields

Field	Description
Model	Model ID of the business application. This field is auto-populated from the **Model ID** field value of the business application form.
Lifecycle type	Type of the lifecycle. Use the following options:

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Field	Description
	• Internal • Publisher
Lifecycle phase	Phase of the lifecycle. Use the following options: • General Availability • End of sale • End of support • End of extended support • End of life
Source	Source of the lifecycle. This field is auto-generated from the business application form.
Phase start date	Start date of the business application lifecycle phase.
Phase end date	End date for the business application lifecycle phase.
Risk	Risk associated with the application lifecycle. Use the following options: • Very high • High • Moderate • Low • None
Active	Option to activate the lifecycle.
Description	Short description of the application lifecycle.

Related topics

Manage the life cycle of a business application

Data classification form

The data classification tags help admin users to better control the data used by the business applications.

Data classification form fields

Field	Description
Name	Name of the data classification.
Description	Short description of the data classification.

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Field	Description
Data Classification Group	Group name that the classification will be a part of.
Active	Option to activate the classification.
Application	Application name for which you're creating the data classification. This field is auto-populated based on the application scope set in the instance.
Order	Order of the classification to appear.
Color	Color of the classification tag.

Related topics

Add a data classification

Data classification group form

The data classification groups help admin users to categorize the classification tags of an information object.

Data classification group form fields

Field	Description
Name	Name of the data classification group.
Description	Short description of the data classification group.
Allow Multi Selection	Option to enable multiple data classifications selection.
Application	Application name for which you're creating the data classification. This field is auto-populated based on the application scope set in the instance.

Related topics

Add a data classification group

Entity Form

Entity is used to scope risk exposure and perform risk assessments on business applications.

Entity Form fields

Field	Description
Name	Name of the profile.
Owned by	Owner of the profile.
Applies to	Business application table where all the business application records are stored.

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Field	Description
	In the dialog box that opens up, enter the business application table in the **Table name** field and the business application record in the **Document** field.
Active	Check box to activate the entity.
Class	Profile class to which the application belongs.

Related topics

Create an entity for audit referencing business application

Architectural artifact form

Architectural artifacts describe a system, solution, or state of an enterprise. The Architectural artifacts in APM enable Enterprise Architects to create and manage the artifacts used in their organization.

Architectural artifact form fields

Field	Description
Name	Name of the artifact.
Owner	Owner of the artifact. The owner is the creator.
Reviewers	Reviewers who can review the artifact request.
Description	Description for the artifact request.
Architectural Category	Architectural category for the newly created artifact. Look up and select the architectural category
Access Settings	
By referenced records	Option to provide access to the APM users to access the artifacts by referenced records. When an artifact is associated to a business capability or business application, any APM user who can access those business entities can also have access to the artifacts associated with those business entities.
Admin access	Option to provide access to document management admin. The users with the document management admin role can have the access to the artifacts.
Sharing permissions	Option to provide access to share documents with other users and groups. You can provide the following permissions: • Role Permissions • User Criteria Permissions

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Field	Description
	• User Permissions • Group Permissions

Related topics

- Architectural artifacts
- Create or edit an architectural artifact
- Add or edit an architectural artifact from Portfolio page

Related Entities form

APM enables the Enterprise Architects to associate an architectural artifact to existing elements in the ServiceNow AI Platform, such as business capabilities or business applications. These associations creates a relationship between the artifact and related entities.

Related Entities form fields

Related Entities form

Field	Description
Architectural Artifact	Name of the architectural artifact.
Entity	Type of the business entity. The entity type can be a business application or a business capability.
Target Record	Name of the particular business application or business capability to which you want to associate the artifact.

Related topics

- Associate an artifact to a business entity

Architectural category form

Architectural category enables Enterprise architects to categorize and manage artifacts efficiently.

Architectural category form fields

Field	Description
Name	Name of the category.
Description	Description of the category.
Parent Category	Hierarchical category. Select the parent category from the Architectural Categories page.

Related topics

- Create or edit an artifact category

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Architectural artifacts version form

APM enables Enterprise architects to create multiple versions of architectural artifacts and send for approval. There can be only one approved version for each artifact.

Architectural artifacts version form fields

Field	Description
Architectural Artifact	Name of the Architectural Artifact.
File type	File type as either a URL or attachment. Do one of the following. • To upload a file, select#**Attachment**, click the attachment icon (), and then select the file. • To link to a document, select#**URL** #and provide the link.
State	State of the artifact version. This field is automatically set to Draft.

Related topics

Create an artifact version

Create diagram form for business application

An Enterprise architect can create a diagram using Lucidchart for a business application hierarchy and associate it with an architectural artifact.

Create Diagram form fields

Field	Description
Diagram Name	Name of the diagram.
Diagram Type	Type of the diagram. It can be either of the following: • Business Application Hierarchy • Business Capability Map This field is auto-populated when creating the diagram from a business application or business capability view.
Diagramming Tool	The tool that you use to create the diagram. Use the following options: • ServiceNow Modeling • Lucidchart

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Field	Description
Business Application	Name of the Business Application for which you are creating the diagram. This field is auto-populated when creating the diagram from a business application view.
Link to Artifact	Artifact to which you want to associate the diagram. Use the following options: • **None**: Select to view the diagram but not associate with any artifact. • **New Artifact**: Select to create an artifact and associate the diagram. • **Existing Artifact**: Select to associate the diagram to an existing artifact.
Artifact Name	Name of the artifact. This field appears only when **New Artifact** or **Existing Artifact** is selected from the **Link to Artifact** field.

Entities	Entities that are included in the chart.
	
	Select the following to include in the diagram:
	• Application Service
	  ○ Hardware Model
	  ○ Software Model
	• Business Capability
	• Demand
	• Digital Integration
	• Digital Interface
	• Information Object
	• Project
	
	Note:
	The Project option is available when the PPM Standard plugin installed.

Folder	Name of the Lucid folder. Select the folder where you want to save the diagram. When you select a folder, its sub folders are displayed.

Related topics

Create a diagram for a business application

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Create diagram for a business capability

An Enterprise architect can create a diagram using Lucidchart for a business capability maps and associate it with an architectural artifact.

Create diagram form fields

Field	Description
Diagram Name	Name of the diagram.
Diagram Type	Type of the diagram. It can be either of the following: • Business Application Hierarchy • Business Capability Map This field is auto-populated when creating the diagram from a business application or business capability view.
Include Business Applications	Option to include business applications.
All Business Capabilities	Option to include all business capabilities maps in the diagram.
Business Capabilities	List of business capabilities for which you want to create the diagram. You can search and add multiple capabilities. **Note:** If you have selected the check box for **All Business Capabilities** in the previous step, then this field does not appear.
Diagramming Tool	The tool using which you are creating the diagram. This field is automatically set to **Lucidchart**.
Link to Artifact	Artifact to which you want to associate the diagram. Use the following options: • **None**: Select to view the diagram but not associate with any artifact. • **New Artifact**: Select to create an artifact and associate the diagram. • **Existing Artifact**: Select to associate the diagram to an existing artifact.
Artifact Name	Name of the artifact. This field appears only when **New Artifact** or **Existing Artifact** is selected from the **Link to Artifact** field.

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Field	Description
Folder	Name of the Lucid folder. Select the folder where you want to save the diagram. When you select a folder, its sub folders are displayed.

Related topics

Create a Lucid diagram for a business capability

Demand form to retire an application

An APM user can raise a request to retire an application if the application is no longer in use.

Demand form fields

Field	Description
Action	Retire Application.
Name	Name of the business application to be retired.
Category	Operational.
Type	Project.

Related topics

Manage Business Application Lifecycle Management service requests

Request Architecture Review form

APM users can request the architecture review board to review a new architecture design proposal based on the technology of a business application.

Request Architecture Review form fields

Field	Description
Business Application	Name of the business application for which an architecture review is requested.
Project	Project that you can tie to this business application for which the architecture review is requested. **Note:** The projects that you own as a project manager appear in the list. The **Project** field appears only when the PPM Standard plugin is activated.
Short Description	A short description explaining the reason for the architecture review.
Architecture Review Requested Date	Date to hold the architecture review.

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Field	Description
	The architecture review date must be in the future. You can attach blueprints or supporting documents for the review.

Related topics

Use Business Application Lifecycle Management to request an architecture review

Indicator form

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

Indicator form fields

Field	Description
Name	Name of the application indicator.
Unit	A number, currency, time, duration in minutes, hours, days, month, or quarter, or rate. You can also create units according to your requirements.
Frequency	Frequency determines the interval at which the data for the indicator source should be collected. The **Frequency** field isn't available when **Performance Analytics** is selected from the **Data source** list.
Target maximum	Maximum value for the indicator. The **Target maximum** field isn't available when **Assessments** is selected from the **Data source** list.
Active	Select the **Active** option to enable the indicator.
CI Class	CI type for which the score is generated.
Direction	Business application with maximum or minimum values. Select Minimize if lower values are better. Select Maximize if higher values are better.
Target minimum	Minimum value for the indicator.

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Field	Description
	The **Target minimum** field isn't available when **Assessments** is selected from the **Data source** list.
Consider Absolute Values	Option to consider values from the **Target maximum** and **Target minimum** fields. This field is available only when values are entered in the **Target maximum** and **Target minimum** fields. When the check box is cleared, values for target maximum and target minimum are considered based on the intelligent logic.
Short description	Short summary of the application indicator.

Datasource Configuration section fields

Field	Description
Default breakdown	Name of the Performance Analytics breakdown.
Data source	Defines the location from which the indicator receives data. • **Performance Analytics**: Collects scores from indicators created in Performance Analytics. See Performance Analytics indicators. • **Custom Script**: Allows you to write a script that collects data from another application. • **Query Condition**: Allows you to select a table to run filters on to obtain data. • **Assessments**: Allows you to evaluate, score, and rank records by assessing records in a table. See Create metric types and generate assessable records. To view results of survey assessments within APM, see Generate survey assessments and view results within APM. • **Indicators**: Allows you to add dependent child indicators. Through the child indicators, data is gathered to the parent indicator. For example, if the parent indicator is number of issues, the dependent indicators can be number of incident counts, number of problems, and changes. These dependent indicators are child indicators

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Datasource Configuration section fields (continued)

Field	Description
	and the number of incidents, problems, and changes recorded are consolidated up to the parent indicator as the number of issues.
Indicator	The **Indicator** field appears when **Performance Analytics** is selected from the **Data source** list. Indicators are statistics that are used to measure current conditions and forecast trends. **Note:** If the collection frequency of the application indicator isn't greater than the frequency at which the data of the Performance Analytic indicator is generated, then the system displays an error message: `Frequency of the indicator must always be greater than or equal to the frequency of the datasource configuration indicator`. For more information, see Collection of PA indicator score data.
Consolidation	Computational method for aggregating the values, a function such as sum, average, maximum, or minimum. Default is Average. For example, Average is the sum of the monthly values divided by the total number of months in a quarter. If you select Maximum or Minimum, then it's the maximum value or the minimum value of a month in the quarter, respectively. If you select Sum, then it's an aggregate of all monthly values in the quarter.

Custom script	The **Custom Script** field appears when **Custom Script** is selected from the **Data source** list.
	
	An example custom script is:
	
	`var results = {};`
	`var applications = [];`
	`var incidentCount = 0;`

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Datasource Configuration section fields (continued)

Field	Description

	`var applicationsGr = new GlideRecord("cmdb_ci_business_app");`
	`applicationsGr.addQuery('active', true);`
	`applicationsGr.query();`
	`//for each application get incident count at business service level`
	`while(applicationsGr.next())`
	`{`
	`incidentCount = 0;`
	
	`var gr = new GlideRecord("incident");`
	
	`gr.addEncodedQuery("opened_at BETWEEN" + startDate + "@" + endDate);`
	
	`gr.addQuery('cmdb_ci_business_app', applicationsGr.getUniqueValue());`
	`gr.query();`
	
	`incidentCount = gr.getRowCount();`
	`var appInfo = {};`
	`appInfo.appId = applicationsGr.getUniqueValue();`
	`appInfo.weight = incidentCount;`
	
	`applications.push(appInfo);`
	`}`
	`results.applications = applications;`
	`results;`

Assessment Metric Type	Type of metric that is used to assess the indicator. **Assessment Metric Type** field appears when the **Data source** is **Assessments**.
Assessment Metric Category	Category of the metric.
Query table	Table from which the queries are filtered.
Query conditions	The conditions based on which the query is filtered.

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Datasource Configuration section fields (continued)

Field	Description
Aggregate field	The field from the selected table is displayed for the records that match the query conditions.
Aggregate type	Type of aggregation applied for calculation of indicator scores. The available options are: • **Sum** • **Count** • **Avg** • **Min** • **Max**
Group by	Categorize the data returned by the query, based on values of a specific field in the query table. For example, if you want to group the data by the life cycle stage status of applications, select Life Cycle Stage.
Consolidation field	The field from the query table on which the computational method for aggregating the values is applied.

Related topics

Create or edit an indicator to assess an application

Scoring Profile form

Create an application scoring profile and update the default application profile with new profile indicators as per business requirements.

Scoring profile form fields

Field	Description
Name	Name of the application profile.
Readjust Weightage	Option to adjust the weightage proportionately among the relevant indicators of the business application.
Description	Description of the application profile.
CI Class	Configuration item type for which the score is generated.

Related topics

Create an application score profile and attach profile indicators

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Scheduled Script Execution form

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

Scheduled script execution form fields

Field	Description
Name	Name to identify this scheduled script execution.
Active	Option to activate the script at the scheduled date and time. By default the job is inactive.
Run	The type of schedule to execute the script on. Choices are: • Daily • Weekly • Monthly
Day	If you select Weekly or Monthly from the Run list, then the Day field appears. • If Run is Weekly, then the day of the week. • If Run is Monthly, then the day of the month.
Time	Time at which the script runs on a 24-hour clock. If Run is Weekly or Monthly, the value includes the time of day.
Conditional	Option for executing only if certain conditions are met.
Run this script	The script to run at the scheduled date and time. You need not edit the script.
Run as	Select another user to run the script execution as. Configure the form to add this field if it is not present.

Related topics

Schedule a job to compute application scores

Select Chart Dimensions form

This form helps to change the configurations of a bubble chart.

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Select chart dimensions form fields

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

Related topics

Analyze application scores in a bubble chart

Application bubble chart form

A bubble chart helps the admin to compare and evaluate the relative standing of application in selected categories.

Application bubble chart form fields

Field	Description
Name	Name of the application bubble chart.
Top left label	Application strategy in the top left label.
Top right label	Application strategy in the top right label.
Bottom right label	Application strategy in the bottom right label.
Bottom left label	Application strategy in the bottom left label.
Top left color	Color for the bubble in the top left quadrant. The color fields accept string inputs including hex code or RGB notation.
Top right color	Color for the bubble in the top right quadrant. The color fields accept string inputs including hex code or RGB notation.
Bottom right color	Color for the bubble in the bottom right quadrant.

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Field	Description
	The color fields accept string inputs including hex code or RGB notation.
Bottom left color	Color for the bubble in the bottom left quadrant. The color fields accept string inputs including hex code or RGB notation.
Quadrant label color	Color for the label. The color fields accept string inputs including hex code or RGB notation.
X Indicator	An application indicator for the X axis. You can also create an application indicator by clicking the **New** button in the Application Indicators form.
Y Indicator	An application indicator for the Y axis.
Z Indicator	An application indicator for the Z axis.
X Label	Label for the X axis. For example, if your **X Indicator** is CSAT, then you can label it as Customer Satisfaction Score.
Y Label	Label for the Y axis.
Z Label	Label for the Z axis.

Related topics

Create or edit a bubble chart for application strategies

New Goal form

Use the Goal form to create goals for your organizational strategic priorities.

New goal form fields

Goal form

Field	Description
Name	Name of the goal.
State	State of the goal. The state can be **Draft**, **In progress**, **Approved**, **Complete**, **Pending**, **Achieved**, or **Not Achieved**.
Parent goal	Name of the parent goal that this goal contributes to.
Strategic priority	Name of the strategic priority that this goal is created for.

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Goal form (continued)

Field	Description
Start date	Start date for the goal. By default, the start date of the current quarter is populated. For a sub-goal, start date of its parent goal is populated.
End date	End date for the goal. By default, the end date of the current quarter is populated. For a sub-goal, the end date of its parent goal is populated.
Owner	Owner of the goal. By default, the name of the user creating the goal is populated.
Category	Category of the goal. The available options are: • **Total Applications** • **Total Cost** • **Opex** • **Capex** • **Cloud Applications** • **Homegrown Applications** • **Support Cost** • **Labor Cost** • **Standards Compliance** • **Strategic** • **Operational** • **Tactical**
Status	Status of the goal. Status can be **Red**, **Yellow**, **Green**, or **None**.
Contributors	Users who contribute to the achievement of the goal.
Team	Assignment group responsible for different activities in achieving the goal.
Impact on parent goal	A numerical value that represents the importance of this goal relative to sibling goals or other goals under its parent goal. By default, the value is (1) Neutral. The available options are: • **(0) No impact** • **(1) Neutral** • **(2) Moderate** • **(3) High** • **(4) Very high** • **(5) Maximum** **Note:** This field is available only when the **sn_gf.weighted_average_enabled** system property is set to **Yes**.
Progress	Percentage complete for the goal. The progress value is calculated automatically if the goal has sub-goals or/and targets.

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Goal form (continued)

Field	Description
	For more information on how the progress value is calculated, see Progress value calculation.
Assigned entity type	Entity type to which the goal is assigned. For example, Business Unit, Department, Company, or Portfolio.
Assigned entity	Entity to which the goal is assigned.
Comments	Detailed comments for the goal to facilitate collaboration.
Classification	Goal classification type. The available options are **Environmental**, **Social**, and **Governance**. This field is applicable only for the ESG Workspace users.

Related topics

Create a goal for an application strategy

Update Goal form

After assessing the applications and deciding on strategies, an admin can update goals to maximize or minimize depending on the indicators for the selected fiscal period.

Update goal form fields

Field	Description
Planned achievement	Percentage of the target that you plan to achieve.
Actual achievement till date	Current percentage achieved.
Comments	Comments, if any.

Related topics

Create a goal for an application strategy

Demand form

Use a demand as a step to identify cost saving opportunities on the applications or capabilities and to meet the target. The strategy that you associate with the demand action decides the strategy for the application.

Demand form fields

Demand form

Field	Description
Action	Course of action for the new demand.

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Demand form (continued)

Field	Description
	Note: The **Action** field is available only when you launch the form within the Enterprise Architecture module and that is when the Enterprise Architecture plugin is activated.
Name	Name of the demand.
Category	Category of the demand. • Strategic • Operational
Type	Type of demand: • Project • Enhancement • Change • Defect The **Category** field selection determines the options available in the **Type** field.
Number	Unique, auto-generated identification number for the demand.
Start date	Start date of the demand.
Due date	Requested completion date of the demand.

Details section form fields

Field	Description
Submitted by	Name of the user who submitted the demand.
Program	Name of the program to which the demand belongs.
Demand manager	Name of the demand manager.
Collaborators	Users who can edit or contribute to the demand. A demand requester can select any user as a collaborator.
Department	Department in a business unit to which the demand submitter belongs. If no value is chosen in this field, it's auto-populated with the name of the department to which the submitter belongs.

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Details section form fields (continued)

Field	Description
Business Unit	Business unit to which the demand submitter belongs.
Impacted Business Units	Business unit that is impacted by the submitted demand.
Business Capabilities	One or more business capabilities to associate the demand with.
Business Applications	Business application that you add to the demand. You can select any business application in your enterprise, irrespective of it being related or not related to the capability that you've selected in the **Business Capabilities** field.

Related topics

- Create a demand towards achievement of goal
- Create a demand towards achievement of a capability
- Add or edit a demand

New Program form

Create a program, link it to the goal that you created, and associate a program manager to the program. After you create a goal, you should have a program to achieve the goal that you created.

New Program fields

Field	Description
Program Name	Unique name for the program.
Primary goal	Primary goal that is to be achieved for the program.
Program manager	Name of the program manager.
Portfolio	Portfolio to which the program belongs.
Number	A unique, auto-generated identification number for the program.
State	State of the program. Use the following options: • Pending • Open • Work in progress • Closed complete

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Field	Description
	• Closed incomplete • Closed skipped
Description	Detailed description of the program.

Dates section fields

Field	Description
Planned start date	Intended date for the program to begin.
Planned end date	Intended date for the program to end.
Planned duration	Expected duration of the program in days and hours.
Actual start date	Date on which the program actually begins.
Actual end date	Date on which the program actually ends.
Actual duration	Duration of the program in days and hours, from its start to closure.

Financials section fields

Field	Description
Total planned cost	An estimate of the cost of the program.
Actual cost	Actual cost of the program.
Budget cost	Budgeted cost of the program.
Planned benefit	Benefit received from the program.
Planned returns	Planned financial returns of the program.
Planned ROI %	ROI percentage associated with the program.

Related topics

Create a program for an application goal

Goal Contribution Target form

The Program Navigation page guides you in setting a goal target for the fiscal years to achieve the goal.

Goal Contribution Target form fields

Field	Description
Program	Name of the program.
Fiscal Year	Fiscal period for which the goal is set.
Active	Check box to enable the program.

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Field	Description
Target Goal Contribution %	Percentage of the target goal contribution for the selected fiscal period.
Comment	Description that explains the target goal contribution for the program.

Related topics

Create a guided plan to execute a program

Business capability form

Business Capability is a common table used within the Application Portfolio Management application.

Business Capability form fields

Field	Description
Name	Name of the business capability.
Parent	The parent capability for the capability that you're creating. Assigning a parent capability renders the business capability as a child capability. If no parent is assigned or if the parent is null, then the level of the capability is at 0 level or root, which means it's a root node capability. If the parent field is made null, then a message prompts you to run a scheduled job to update the business capability levels.
Level	The level at which the capability is in the hierarchy. If there's no parent capability, then the level is 0, which indicates that the capability is at the root level. Level at which the capability is in the hierarchy. Up to six levels are supported. If you add a capability or update it by changing its parent, then run the Update Business Capability Levels job, on demand. The job determines the capability level and updates all the capabilities with the level information. **Note:** The system updates the field and the user can't.
Business Unit	Business unit that is associated with the selected business capability.
Order	Assign any integer value. Applicable only for level-0 capability.

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Field	Description
	The number you assign determines the position of the capability in the sequential order of all other business capabilities in that capability hierarchy. The **Order** field is available only for root node or level-0 capabilities. The scheduled job checks for conditions such as order values entered for non-root capabilities, duplicate order values, and null value and eliminates such values. It calculates and sets the level and hierarchy ID for each capability.
Department	Department that is associated with the selected business application.
Leaf Node	This field denotes whether the business capability is a parent of any other capability. If the option is enabled, then it means that it doesn't have child capability. Capabilities follow a parent-child hierarchy. The Leaf node attribute in the capability denotes that it isn't a parent of any other capability. **Note:** The system updates the field and the user can't.
Owned by	User who owns the business capability.
Hierarchy ID	Hierarchy ID of the business capability. For level 0 capability, a hierarchy ID is generated based on the order. For all non-root capabilities, the hierarchy ID is generated based on the hierarchy ID of its parent. The number is prefixed to the business capability and you can view it in the capability hierarchy map. The capabilities are structured vertically according to their hierarchy IDs. Whenever a capability is updated such as if a parent is added or deleted, then the hierarchy ID is automatically updated.

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Field	Description
	Note: By default, the system updates the field. So, you can't edit the field. However, if you prefer a different number or value for the hierarchy ID from what the system generates, you can reset the system property flag to **True**. Setting the property to true makes the **Hierarchy ID** field editable in the Business Capability form and you can enter the value. By this action, the system default logic of generating the hierarchy ID is overridden by your custom hierarchy ID.
Description	A short description of the business capability.

Related topics

Create business capability and relate the capability with an application

Business capability new record form

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

Business Capability New record form fields

Field	Description
Name	Unique name for the business capability.
Description	Short description of the business capability.
Parent	If the capability is to be a root level capability or at level 0, then leave the field blank. Adding a parent renders the capability as a child and not as a root capability.

Related topics

Manage capability hierarchy in the capability map

Add a business capability

Application Service Hardware Models form

Track your equipment assets such as computers and servers using hardware models.

Application Service Hardware Models form fields

Field	Description
Application Service	Name of the application service.

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Field	Description
Ignore Technical Risk	Option to ignore the technical risk of the hardware model.
Hardware Product Model	Name of the model category.

Related topics

Associate an application service to hardware model

Application Service Software Model form

Business applications have multiple instances such as development, QA, and production. Instances are nothing but application services. Hence application services must be associated with software models (to the respective full versions) to know the risk of the application service.

Application Service Software Models form fields

Field	Description
Application Service	Name of the application service.
Ignore Technical Risk	Check box to ignore the technical risk of the software model. The risk of an application service is high even if one of its underlying software models risk is high. Hence, use this check box to ignore the risk of a software model if it is insignificant and does not contribute much to the risk of the application service.
Primary Software Model	Check box to make the software model as a primary one.
Software Model	The software model that underlies the application service.
Lifecycle Full Version	The granular licensable version of the software.

Related topics

Associate an application service to a software model

Risk Parameter form

Risk Parameter is a common table used within Application Portfolio Management application.

Risk Parameter form fields

Risk Parameter form

Field	Description
Name	Name of the risk parameter.
Description	A short description of the risk parameter.

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Risk Parameter form (continued)

Field	Description
Active	Enable the check box to make the risk parameter active.
Script	Create a script that calculates the risk of the software model and the risk of the business application and schedule it to run daily.

Related topics

Create a risk parameter

New TRM product form

As a member of the Enterprise Architect group, you can add a Technology Reference Model (TRM) product to the TRM library.

TRM Product form fields

Field	Description
Publisher	Publisher of the software or hardware product. Look up and select a publisher from the Companies page.
Type	Select the type of the product. The list includes: • Software • Hardware **Note:** The fields **Is New Product**, **Software Product**, and **Hardware Product** are displayed only when you have the SAM Foundation plugin and the Hardware Asset Management plugin installed on your instance.
Is New Product	Option to specify if it's a new product.
Software Product	Name of the software product. **Note:** This field appears only when the **Type** is selected as Software and the Software Asset Management Foundation plugin is installed on your instance.
Hardware Product	Name of the hardware product.

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Field	Description
	Note: This field appears only when the **Type** is selected as Hardware and Hardware Asset Management plugin is installed on your instance.
Name	Name of the software or hardware product. This field appears only when the **Is New Product** check box is selected.
Category	Category of the product. Look up and select a category from the TRM Categories page.
TRM Phase	Phase of the product. Use the following list: • Approved • Approved with Constraints • Divest • Evaluation • Unapproved
Investment direction	Purpose for the investment. Use the following list: • Divest • Eliminated • Invest • Maintain
Business Justification	Business justification for the product request.

Related topics

Add a TRM product

TRM Product Request form

The TRM Product Request form is used for adding or editing a request to include a new software or hardware product to the Technology Reference Model (TRM) library.

TRM Product Request form fields

Field	Description
Number	A unique, auto-generated identification number for the product request.
Publisher	Publisher of the software or hardware product. Look up and select a publisher from the Companies page.

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Field	Description
Type	Select the type of the product. The list includes: • Software • Hardware **Note:** The fields **Is New Product**, **Software Product**, and **Hardware Product** will be displayed only when you have the Software Asset Management Foundation plugin and the Hardware Asset Management plugin installed on your instance.
Is New Product	Option to specify if it's a new product.
Software Product	Name of the software product. This field appears only when the **Type** is selected as Software and Software Asset Management Foundation plugin is installed in your instance.
Hardware Product	Name of the software product. This field appears only when the Hardware Asset Management plugin is installed in your instance.
Name	Name of the software or hardware product. This field appears only when the **Is New Product** check box is selected.
Short Description	Description about the product request.
Approval	Status of the approval. Choices include: • Not yet requested • Requested • Approved • Rejected
Requested TRM Phase	Phase of the product. Look up and select a phase from the TRM Phases page.
Category	Category of the product. Look up and select a category from the TRM Categories page.
Business Justification	Business justification for the product request.

Related topics

Add or edit a TRM product request

View and edit your product requests

TRM Product Request using catalog form

The TRM Product Request using catalog form is used to add or edit a request for including a new software or hardware product to the Technology Reference Model (TRM) library.

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TRM Product Request form fields

Field	Description
Publisher	Publisher of the software product. Look up and select a publisher from the Companies page.
Category	Category of the product. Look up and select a category from the TRM Categories page.
Type	Select the type of the product. The list includes: • Software • Hardware **Note:** The fields **Is New Product**, **Software Product**, and **Hardware Product** are displayed only when you have the Software Asset Management Foundation plugin and the Hardware Asset Management plugin installed on your instance.
Is New Product	Option to specify if it's a new product.
Software Product	Name of the software product. This field appears only when the **Type** is selected as **Software**, and when the Software Asset Management Foundation plugin is installed on your instance.
Hardware Product	Name of the hardware product. This field appears only when the **Type** is selected as **Hardware**, and when the Hardware Asset Management plugin is installed on your instance.
Name	Name of the software or hardware product. This field appears only when the **Is New Product** check box is selected.
Requested TRM Phase	Phase of the product. Look up and select a phase from the TRM Phases page.
Short Description	Description about the product request.
Business Justification	Business justification for the product request.

Related topics

TRM Product Request using catalog form

TRM Product Lifecycle Request form

The TRM Product Lifecycle Request form is used for adding or editing a request to create a lifecycle for a Technology Reference Model (TRM) product.

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TRM Product Lifecycle Request form fields

Field	Description
Number	A unique, auto-generated identification number for the product request.
Publisher	Publisher of the software or hardware product. Look up and select a publisher from the Companies page.
TRM Product	Name of the TRM product. Look up and select the product from the TRM Products page.
Version	Version of the TRM software product. This field appears only when a software product is selected in the **TRM Product** field.
Edition	Edition of the TRM software product. Either Standard or Enterprise. This field appears only when a TRM product of type software is selected in the **TRM Product** field.
Hardware model	Select the hardware model from the list of available hardware models. This field appears only when a TRM product of type hardware is selected in the **TRM Product** field.
Model number	Hardware model number. This field is auto-populated with a model number, when a hardware model is selected. This field appears only when a TRM product of type hardware is selected in the **TRM Product** field.
Requested TRM Phase	Phase of the product. Look up and select a phase from the TRM Phases page.
Phase start date	Start date of the product lifecycle phase.
Phase end date	End date for the product lifecycle phase.
Barcode	Barcode of the hardware model. This field is auto-populated with the barcode number, when a hardware model is selected. This field appears only when a TRM product of type hardware is selected in the **TRM Product** field.
Business Application	Name of the business application. Look up and select a business application from the Business Applications page to associate it to the TRM product lifecycle.
Short Description	Description about the product lifecycle request.
Business Justification	Business justification for the product lifecycle request.

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Related topics

- Request a TRM product lifecycle using the TRM Catalog
- Add or edit a TRM product lifecycle request
- View and edit your product lifecycle requests

TRM Category form

Add a new request or edit an existing request to create a TRM category.

TRM Category form fields

Field	Description
Name	A unique name of the category.
Reference Code	Reference code for the category. The reference code is used to keep reference to other authoritative data source, such as the federal TRM.
Parent Category	Select a parent category to add the category to a hierarchical structure. Look up and select a category from the TRM Categories page.
Description	Description about the TRM category.
Domain	Name of the domain. The base system sets the default domain as Global.

Related topics

- Add or edit a TRM category
- Add or edit a TRM category

TRM Phase form

Define your own TRM phase or edit an existing TRM phase.

TRM Phase form fields

Field	Description
Name	Name of the phase.
Description	Description about the phase.
Production Approved	Option to mark as approved for production or not.
Color	Color that defines the TRM phase. Select a color from the drop-down list.
Shape	Shape that defines the TRM phase. Select a shape from the drop-down list.

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Related topics

Add or edit a TRM phase

Add or edit a TRM phase

Data Domain form

Relate an information object to the database catalog of a database instance to collect the physical data. ServiceNow Discovery finds database catalog that lists all the catalog objects, or databases, discovered for an instance of a database.

Data Domain form fields

Field	Description
Name	Name of the data domain.
Description	Short description of the data domain.
Parent	Parent domain of the data domain. This is used to create a data domain hierarchy.
Leaf Node	Indicator that the data domain is at the lowest level of the hierarchy.

Related topics

Create a data domain

Information Objects form

An information object captures the logical data for the business application.

Information Objects form fields

Field	Description
Select classification tag	Drop-down list to show the classification groups and classification that can be applied to the information object.
Name	Name of the information object.
Data classification	Category of data. Displays the classification tags applied on the information object.
Owned by	User who owns the information object.
Business Unit	Business unit that owns the information object.
Department	Department in the business unit that actually owns the information.
Description	Short description of the information object.

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Field	Description
Data domain	Reference to the Data Domain table that holds the categorized conceptual data. The relationship between the conceptual and the logical data layers is established by referencing the data domain in the Information Object table.

Related topics

- Apply classification tags to an information object
- Create an information object referencing data domain

Add relationship form

Relate a business application to an information object using the CI relationship [cmdb_rel_ci] table of type Uses::Used by. Use this suggested relationship to get the logical data of the information object to leverage a business application.

Add relationship form fields

Field	Description
Business Application	Name of the business application that auto-populates in the field.
Relationship	Type of suggested CMDB CI relationship between the business application and the information object. The field is auto-populated with Uses::Used by relationship.
Select Information Object	Table with the logical data that the business application uses.
Create, Read, Update, and Delete	Options for capturing the type of operation or a combination of operations that the business application can do on the information object. Selecting the Create, Read, Update, and Delete (CRUD) check boxes adds qualifiers, which are properties that define the extent of the relationship between the business application CI and the information object CI.

Related topics

- Relate a business application to an information object

Status of the Software models

An application owner can run the software model suggestions engine to fetch software models. These models can be related to an application service instead of mapping them manually. Every application service displays the status after they are mapped.

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Status of the Software models

First run of the job	Second run of the job	Conditions of association	New status of the software model
Found	Found	Yes	**Associated**: Associates the selected software model to the application service. The status is prefixed with a green bubble. In the subsequent run of the job, these software models are still in Associated state. You may choose to dissociate the software model if it has been removed or uninstalled from the hardware on which the application service runs.
Found	Found	No	**Ignored**: If no action is taken on the software models in the prior run of the job, then they are identified as **Ignored** (prefixed with a gray bubble) in the current run of the status.
Not found	Found	Not applicable	**New**: The software models that are identified in the first run of the job, and those software models that have been added after the last run but before the current run are marked with status **New** prefixed with a yellow bubble. You can associate or dissociate such software models.
Found	Not found	Yes	**Delete**: You can delete a software model that is in Associated, Ignored, or New status. This action deletes the

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First run of the job	Second run of the job	Conditions of association	New status of the software model
			software model from the list of the retrieved software models, which is Retrieved Software Models [sn_apm_service_software_model_sug table but not from the Application Service Software Model [sn_apm_tpm_service_software_model table.
Found	Not found	No	Delete

Related topics

Associate suggested technology models to an application service

Date conditions

A maintenance user can configure Date range for the lifecycle phases.

Date conditions

Date conditions

Date conditions	Timeline in TPM screen
Current date, Current date –10 years, Current date + 3 years.	Default dates. Timelines of product models that fulfill the default date conditions are shown.
All phases that start before the current date – 10 years and continues to the present time.	Product models with such date conditions are shown and the timeline expands itself automatically from the default (–10 years to +3 years) to accommodate the past years.
Phases that start before the current date –10 years and continue beyond the current date and may still be in progress	Product models with such phases are shown until current date + 3 years.
Lifecycle phases that start and end before the current date –10 years	Product models with such phases are NOT shown.

Lifecycle phase of record	Conditions for plotting the dates on TPM timeline
One internal and one publisher	All dates are plotted on the timeline.
Multiple publishers	Only one publisher date is plotted. The publisher that is selected for plotting depends on the *sequence* property in the source column. All sources have a sequence number attached to them. The source with the least sequence number is selected. If

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Lifecycle phase of record	Conditions for plotting the dates on TPM timeline
	the source with the least sequence number does not have any lifecycle records, then the source with the next least sequence number is selected.
One internal and multiple publishers	The internal date is plotted, but only one publisher date is plotted. The publisher record that is selected for plotting depends on the *sequence* property.
Overlapping dates of two phases	Only one line is shown.
Gaps in dates	A continuous line with no gap in the timeline.

Related topics

Product lifecycle data on the timeline

Quick start tests for Application Portfolio Management

Validate that Application Portfolio Management still works after you make any configuration changes, such as applying an upgrade or developing an application. Copy, customize, and pass these quick start tests when using your instance-specific data.

Application Portfolio Management quick start tests require enabling the Application Portfolio Management – ATF Tests plugin (com.snc.apm.atf).

APM: Create Business application and capability test suite

Test	Description	Release version
APM: Create Business Application	Verify the creation of an application category and then the creation of a business application with users having apm_user role.	Madrid
APM: Create Business Capability	Verify the creation of a parent and child business capability and verify its field values.	Madrid
APM: Test relating Business Service, Business Application, and Software Models	Verify the creation of a business application, business service, using the existing software model, and a relationship between them.	Orlando
APM: Test for Indicator Score and Application Score generation	Verify the creation of indicator, scoring profile, and generation of indicator scores and application scores.	Paris
APM: Business Application with Information Object and Data Domain	Verify the creation of business application, information object, and addition of the CRUD operations in relation attributes.	Quebec

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APM TRM: Test relating TRM product and product life-cycle request test suite

Test	Description	Release version
APM: Creating and Approving Product and Product Lifecycle Request	Create and approve product TRM requests and product lifecycle requests.	Utah

Related topics

Quick start tests

APM Cloud Assessment Scoring Profile

The Cloud Assessment scoring profile in Application Portfolio Management helps you to evaluate a business application for its cloud migration readiness.

Indicator for APM Cloud Assessment Scoring Profile

Indicator name	Frequency	Type	Source	How is it calculated	Description
Strategic Importance	Year	Custom Script	APM product. cmdb_ci_business_app table	Calculated from the **Emergency tier** (emergency_tier) field of the business application record.	Evaluates the emergency tier of the business application.
Data Classification	Year	Custom Script	APM product. cmdb_ci_business_app table	Calculated from the **Data classification** (data_classification) field of the business application record.	Evaluates data classification of the business application.
Cloud Version Available	Year	Custom Script	APM product. cmdb_ci_business_app table	Calculated from the **Cloud version available** (cloud_version_available) field of the business application record.	Evaluates if there is an available version of this application that fits cloud deployment.
Core Architecture	Year	Custom Script	APM product. cmdb_ci_business_app table	Calculated from the **Core architecture** (core_architecture) field of the business	Evaluates if this business application is part of the core architecture.

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Indicator name	Frequency	Type	Source	How is it calculated	Description
				application record.	
Business Criticality	Year	Custom Script	APM product. cmdb_ci_business_app table	Calculated from the **Business criticality** (business_criticality) field of the business application record.	Evaluates the business criticality of the business application.
Regulatory Implications	Year	Custom Script	APM product. cmdb_ci_business_app table	Calculated from the **Regulatory implications** (regulatory_implications) field of the business application record.	Evaluates the regulatory implications of the business application.
Business Impact	Year	Indicators	Not applicable	Calculated from the sum of the following indicators: • **Core architecture** (core_architecture) • **Strategic importance** (emergency_tier) • **Business criticality** (business_criticality)	Evaluates the business impact score for the business application, based on other indicators.
Cloud Readiness	Year	Indicators	Not applicable	Calculated from the sum of the following indicators: • **Data classification** (data_classification) • **Cloud version available** (cloud_version_available)	Evaluates the cloud readiness score for the business application based on other indicators.

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Indicator name	Frequency	Type	Source	How is it calculated	Description
				• **Complexity of integration** (integration_complexity) • **Regulatory implications** (regulatory_implications)	
Complexity of Integration	Year	Custom Script	APM product. cmdb_ci_business_app table	Calculated from the **Integration complexity** (integration_complexity) field of the business application record.	Evaluates the complexity of integration to the business application.
User Base	Year	Custom Script	APM product. cmdb_ci_business_app table	Calculated from the **User base** (user_base) field of the business application record.	Evaluates the user base of the business application.
Cloud Readiness Assessment	Year	Assessments	APM product. cmdb_ci_business_app table	Calculated from the **Assessment instances** of the business application record.	Evaluates the cloud readiness assessment score (based on a survey).

Related topics

Application Portfolio Management (APM) Cloud Assessment

Create a digital interface form

Create a digital interface for an integration in Application Portfolio Management

Digital Interface form fields

Field	Description
Name	Unique and meaningful name of the digital interface.
Number	Number of the digital interface. This field is automatically generated with the DINTF prefix and can't be edited.

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Field	Description
Provider Business Application	Name of the provider business application that provides, manager, and owns the interface. **Note:** This attribute can be empty if there is no business application in your repository. If you are using open interfaces such as Weather or Financial Service, you are only aware of the interface and track it without a related business application.
Interface Type	Type of API used by the interface. It helps to track whether the API is Public or Open. **Note:** For Public or Open APIs, there won't be any Provider Business Application unless the Organization exposes it as an open interface. Use the following options: • Open API • Partner API • Internal API Public or Open APIs are available to anyone and can be used without any restrictions or license agreements. Internal or Private APIs are available to authorized (technical) users only and can be used without any usage restrictions and regulations. Partner APIs are available to authorized partners of an API provider. Usually, these APIs have special terms and conditions for usage.
Parent	Name of the parent interface. Often, interfaces are bundled or part of a composition. As you can reference a digital interface on the digital integration, use the parent interface. The digital interfaces related to the parent interface are listed in the related list of the interface.
Version	Version of the interface. This field helps you to track which digital integrations are using which version of an interface.
Life Cycle Stage	Life cycle stage of the interface. Use the following options:

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Field	Description
	• Ideation • Design • Deploy • Operational • End of Life
Life Cycle Stage Status	Life cycle stage status of the interface. Each of the main life cycle stages can have one or more life cycle stage statuses. For example, a digital Interface in the operational stage might change status over time from In Use to In Maintenance to Pending Retirement. Use the following options: • Ideation: Under Evaluation, Pilot • Design: Chartered, Design, Build • Deploy: Test • Operational: In Use, In Maintenance, Pending Retirement • End of Life: Retired, Obsolete
Model ID	Model ID of the interface. This field helps you to track the interface model. This is a reference to the Application Model table where you can manage your own variants of API models or types. For example, Table API, Attachment API, Aggregate API, and Process APIs. This optional field can be used to track the interface model. Depending on your use case, you can add new models and model categories.
Description	Description of the digital interface. Provide the high-level design aspects of the interface. You can provide the details such as how the digital interface adds value, how it should be designed, and how it's intended to be used. You can also describe different changes and capabilities according to version of the interface. It helps the Application owners and Architects to decide which interface version they want to use.

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Owners section fields

Field	Description
Business Owner	The owner of the business function, who owns the digital interface. It can be the same person who owns the parent business application.
IT Owner	The owner within the IT organization, who owns the digital interface. It can be the same person who owns the parent business application.
Supported By	Name of the Subject matter Expert (SME) or individual who provides support to the digital interface.
Support Group	Name of the group that provides support to the digital interface.

Functional section fields

Field	Description
Protocol	Type of protocol used by the interface. API Protocols are the specifications that regulate the application. These protocols are used to integrate application programming interfaces with their software. Choices include REST, SOAP, LDAP, and so on. **Note:** This list is a non-exhaustive list and can be extended by adding your preferred values or hide the provided values.
Message Format	Format of the message in the interface. Choices include JSON, XML, CSV, and so on. **Note:** This list is a non-exhaustive list and can be extended by adding your preferred values or hide the provided values.

Authentication section fields

Field	Description
Authentication Type	Type of authentication used to authenticate the interface. Use the following options: • Basic Auth • OpenID Connect • Certificate

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Authentication section fields (continued)

Field	Description
	• WS-Security • LDAP • None • Other You can use the system-provided authentication types or add yours.
Authorization Type	Type of authorization used to authorize the interface. Use the following options: • OAuth 2.0 Token • JWT Web Token • SAML 2.0 Token • Other • No authorization You can use the system-provided authentication types or add yours.

Activities section fields

Field	Description
Work notes	Comments about the interface.

Create or update a digital interface

Digital interface to API form in APM

The relationship between a digital interface and an application service API helps analysts to view which digital interface is using which API.

Digital interface to API form fields

Field	Description
Number	Number of the digital interface API. This field is automatically generated and can't be edited. The number starts with the prefix DINTFAPI (for example: DINTFAPI0001234).
Digital Interface	Name of the digital interface. This field is auto-populated with the name of the interface that you're editing. If you want to create the relationship to a different digital interface, use the Lookup icon to select a digital interface.

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Field	Description
API	Name of the CMDB API. Select an API that you want to associate to the digital interface. You can also select the child class of the API (cmdb_ci_api). For example, Managed API (cmdb_ci_managed_api).
Description	Description of the connection between the digital interface and the API.

Related topics

Connect a digital interface with CMDB API in APM

Management of digital integrations

You can manage all the integrations and interfaces at a centralized space.

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

You can do the following:

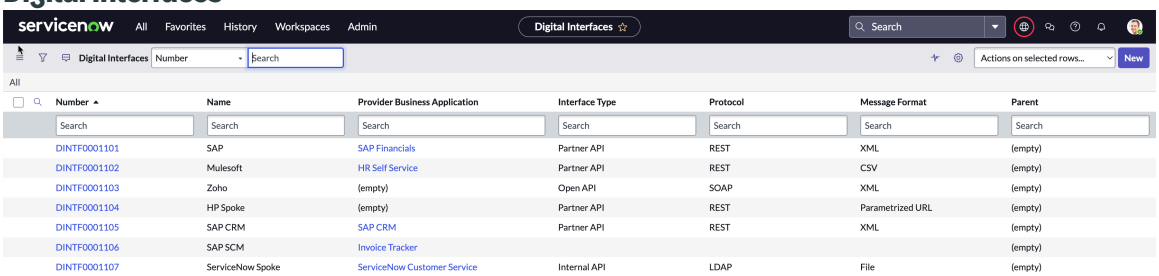
- Proactively find out the issues of the integrations at one place.
- Manage the information flows across your organization.
- Have complete governance over the use of interfaces for internal and external APIs.

Digital interfaces in Application Portfolio Management

Manage digital interfaces in Application Portfolio Management.

Digital interfaces are provided as part of a business application, but they can also stand on their own. Interfaces provide a way for other business applications to interact with the applications. An interface contains the metadata about itself, such as its Name, Version, Owners, Protocol. It also contains a list of all the integrations that are using that interface.

Digital Interfaces



Create or update a digital interface

Create a digital interface for an integration to describe how business applications can interact.

Before you begin

Role required: sn_apm.apm_analyst

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About this task

Each business application or an application service you interact with provides a logical high-level description of how to interface with the application or service. The digital interface is an object used in the Design phase to describe how other services or business applications can interact. At the same level, you can define which information objects are provided or updated by this digital interface.

Procedure

1. Navigate to **All** > **Application Portfolio Management** > **Application Portfolio** > **Digital Interfaces**.
2. Create or update a digital interface.
   a. To create a digital interface, select **New**
   b. To update an existing digital interface, select a digital interface number link to open it.
3. On the form, fill in the fields.
   For field information, see Create a digital interface form.
4. Select **Submit**.

Delete a digital interface

Delete a digital interface that you no longer need.

Before you begin

Role required: sn_apm.apm_analyst

Procedure

1. Navigate to **All** > **Application Portfolio Management** > **Application Portfolio** > **Digital Interfaces**.
2. Open a digital interface number by clicking it.

   Note:
   You cannot delete a digital interface if it has any digital integration associated with it.

3. Click **Delete**.
4. Confirm the deletion.

Digital integrations

Manage digital integrations in Application Portfolio Management.

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

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

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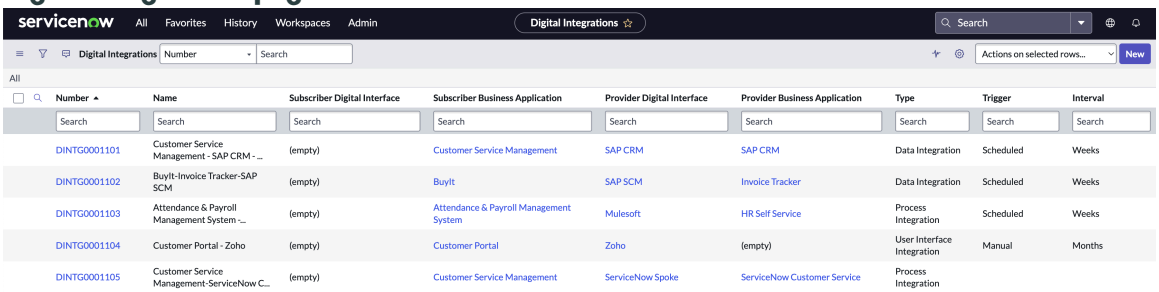
The Digital Integrations page displays a list of existing digital integrations and their related information. You can access the Digital Integrations page by navigating to **All** > **Application Portfolio Management** > **Application Portfolio** > **Digital Integrations**.

Digital Integrations page



Create a digital integration

Create a digital integration in Application Portfolio Management, to create a connection between a consuming business application and a provider business application.

About this task

The digital integration is a design object used by the Enterprise Architects. It describes a connection between two business applications or between a business application and an external service (for example: AWS, Yahoo, a TimeZone Conversion service) that provides an interface (API) to interact with.

You can define why a connection is required between two data entities, over which Interfaces they should communicate, and provides a link to relevant design and architectural material. A Digital Integration underpins a business capability and provides business value.

Before you begin

Role required: sn_apm.apm_analyst

Procedure

1. Navigate to **All** > **Application Portfolio Management** > **Application Portfolio** > **Digital Integrations**.
2. Select **New**
3. On the Create Digital Integration form, fill in the fields.
   For a description of the field values, see Create digital integration form.
4. Select **Submit**.

Result

On the Digital Integrations page, a success message and the link to the newly created digital integration appear.

After submission of the form, within the CMDB platform, a CI relationship (Interfaces::Interfaced By) gets created between provider and subscriber business applications. In a case, where the digital interface has no relation to a business application (using Open or Public API), the digital integration is created between the subscriber business application and a standalone digital interface.

Update a digital integration

Update the details of an existing digital integration in Application Portfolio Management.

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Before you begin
Role required: sn_apm.apm_user

Procedure

1. Navigate to **All** > **Application Portfolio Management** > **Application Portfolio** > **Digital Integrations**.
2. Open a digital integration number by selecting it.
3. On the Digital Integration form, fill in the fields.
   For a description of field values, see Update digital integration form.
4. Select **Update**.

Delete a digital integration

Delete a digital integration that you no longer require.

Before you begin
Role required: sn_apm.apm_user

Procedure

1. Navigate to **All** > **Application Portfolio Management** > **Application Portfolio** > **Digital Integrations**.
2. Select and open the digital integration to be deleted.
3. Click **Delete**.
   A confirmation message appears.

Use Business Application Lifecycle Management to request a digital integration

Submit a request using the Application Lifecycle Management module to request a digital integration in Application Portfolio Management.

Before you begin
Role required: sn_apm.apm_user

Procedure

1. Navigate to **All** > **Application Portfolio Management** > **Business Application Lifecycle Management** > **Business Application Catalog**.

   The Business Application Lifecycle Management Services opens in a service catalog page.
2. Register a new digital integration by selecting the **Request a Digital Integration** card or selecting **View Details** in the Request Digital Integration card.
3. On the Request a Digital Integration form, fill in the fields.
   For a description of the field values, see Request digital integration form.
4. Select **Submit**.

Result
The system validates your request to check if a digital integration with the same name exists. If yes, then an error message is displayed. If no, then a flow is triggered and a request to register a digital integration is created.

After your request is approved, the requested digital integration is created as a record in the digital integrations table.

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Use Business Application Lifecycle Management to retire a digital integration

Retire a digital integration that you no longer need. Submit a request using the Application Lifecycle Management module to retire a digital integration in Application Portfolio Management.

Before you begin

Role required: sn_apm.apm_user, sn_apm.apm_analyst

About this task

Based on your role, you can either directly retire a digital integration, or you can request that an approver retires the digital integration. Retiring a digital integration occurs in the following conditions:

Conditions for retiring a digital integration

Role	Action allowed
APM user, IT owner, Business owner, or Supporter of the digital integration	Can request to retire a digital integration. The analyst then approves or rejects the request.
APM analyst	Can retire a digital integration. You can approve or reject the requests for retiring a digital integration.

Procedure

1. Navigate to **All** > **Application Portfolio Management** > **Business Application Lifecycle Management** > **Business Application Catalog**.

   Business Application Lifecycle Management Services opens in a service catalog page.
2. Retire a digital integration by clicking the **Retire a Digital Integration** card or by clicking **View Details** in the Retire Digital Integration card.
3. From the list of values in the Retire Digital Integration form, select the name of the digital integration.
4. Click **Submit**.

Approve or reject a digital integration request

As an Enterprise Architect user, approve or reject a digital integration request submitted by APM users.

Before you begin

The user must be part of the Enterprise Architect Group.

Role required: sn_apm.apm_analyst

Procedure

1. Navigate to **All** > **Service Desk** > **My Approvals**.
2. Select the digital integration request that you want approve or reject.
3. Select **Approve** or **Reject**.

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Enterprise Architecture Workspace for Application Portfolio Management

The Enterprise Architecture Workspace (EA Workspace) is part of the Application Portfolio Management application. It provides an interactive user interface to enable enterprise architects to stay up to date with their tasks, get insights, and monitor the health of the portfolio from a single location.

Starting from the Utah release, the Enterprise Architecture Workspace is available on the ServiceNow Store. For installation information, see Install Enterprise Architecture Workspace.

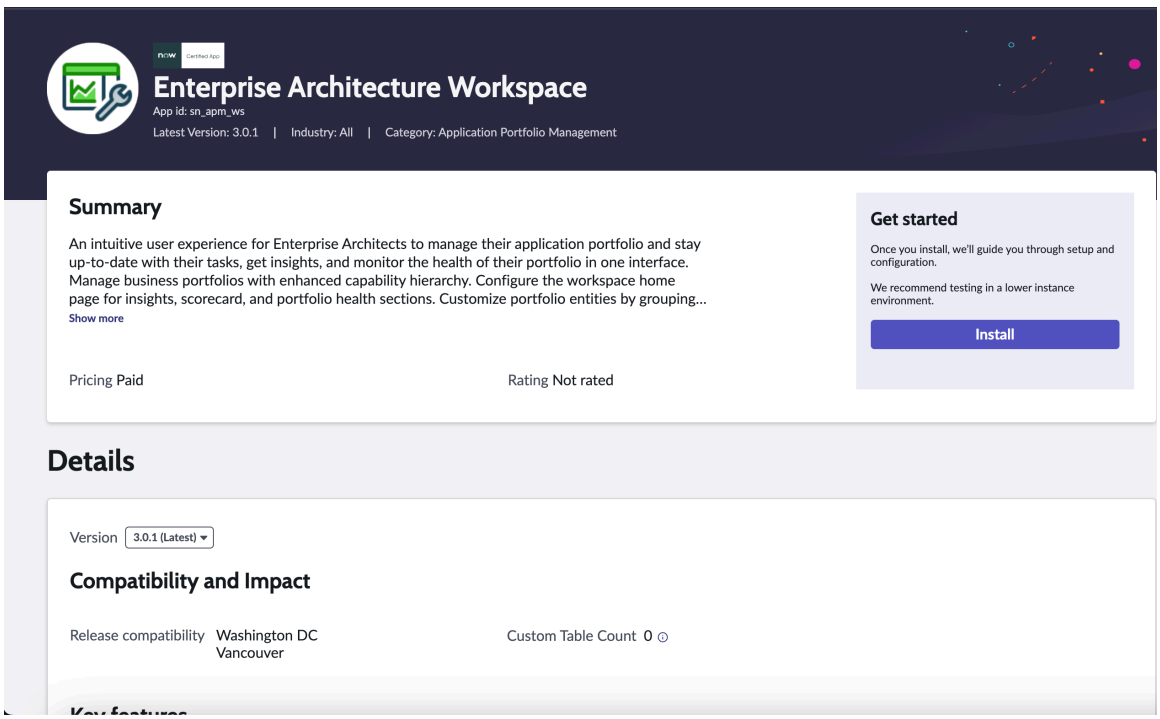
Install Enterprise Architecture Workspace

Install the Enterprise Architecture Workspace application (sn_apm_ws) if you have the admin role.

Before you begin

- Review the Enterprise Architecture Workspace application listing in the ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.
- Ensure you have activated the Application Portfolio Management plugin (com.snc.apm).
- For enabling the technology portfolio management information in the Enterprise Architecture Workspace:
  - Ensure you have activated the Software Asset Management Foundation plugin (com.snc.sams).
  - Ensure you have installed the Technology Portfolio Management (sn_apm_tpm) store app.

Role required: admin



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Procedure

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

   You can search for the application by its name or ID. If you cannot find an application, you may have to request it from the ServiceNow Store.

   Visit the ServiceNow Store website to view all the available apps and for information about submitting requests to the store. For cumulative release notes information for all released apps, see the ServiceNow Store version history release notes.
3. Select a version from the list and select **Install**.

   In the Install dialog box that is displayed, any dependencies that are installed along with your application are listed.
4. If you're prompted, follow the links to the ServiceNow Store to get any additional entitlements for dependencies.
5. **Optional:** If demo data is available and you want to install it, select the **Load demo data** check box.
   Demo data comprises the sample records that describe application features for the common use cases. Load the demo data when you first install the application on a development or test instance.

   Important:
   If you don't load the demo data during installation, it's unavailable to load later.
6. Select **Install**.

[store-future: BEGIN review]

Installed with Enterprise Architecture Workspace

Several types of components are installed with Enterprise Architecture Workspace.

[End]

Enterprise Architecture Workspace access roles

The following roles help you to configure and use the Enterprise Architecture Workspace application. After access has been granted to a role, all the groups or users assigned to the role are granted access. Roles can contain other roles, and any access granted to a role is granted to any other role that includes it.

EA Workspace roles

Enterprise Architecture Workspace Roles

Role	Description
sn_apm.apm_analyst	Create application records and access, dashboards, and associated pages.
sn_apm.apm_admin	Create or update application records and access administration activities.
sn_apm.apm_user	Access to view and update applications.

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Tables installed with Enterprise Architecture Workspace

The following tables are added with activation of Enterprise Architecture Workspace.

Installed tables

Table	Description
Certifications Elements [cert_element]	Stores quarterly or on-demand certifications for business applications.
Follow On Tasks [cert_follow_on_task]	Stores follow-up tasks for the following: • Business applications not related to a business capability • Orphan business capabilities • Information objects not related to any business application • Software models with no life-cycle data • Business applications not related to any software models • Hardware models with no life-cycle data • Business applications not related to any hardware models
Software Model Risks [sn_apm_tpm_software_model_risk]	Stores software models that are at risk.
Software Risk Parameter Scores [sn_apm_tpm_risk_param_score]	Stores software models that are nearing their end of life.
Hardware Model Risks [sn_apm_tpm_hardware_model_risk]	Stores hardware models that are at risk.
Hardware Risk Parameter Scores [sn_apm_tpm_hm_risk_param_score]	Stores hardware models nearing their end of life.
TPM Discovered Technologies [sn_apm_tpm_discovered_technology]	Stores hardware and software elements in your enterprise.
TPM Technology Lifecycle [sn_apm_tpm_technology_lifecycle]	Stores the technology life cycles associated with the discovered technologies.
TPM Technology Lifecycle Exception [sn_apm_tpm_technology_lifecycle_exception]	Stores the life cycles that were approximated or couldn't be found from ServiceNow® Software Asset Management Professional or ServiceNow® Hardware Asset Management Professional.
TPM Discovered Technology Run Log [sn_apm_tpm_discovered_technology_run_log]	Stores when ServiceNow® Technology Portfolio Management (TPM) refreshed its contents against Software Asset Management Professional and Hardware Asset Management Professional.
TPM Technology Risk [sn_apm_tpm_technology_risk]	Stores the TPM technology risk information.

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[store-future: BEGIN review]

Scheduled jobs installed with Enterprise Architecture Workspace

Scheduled jobs are added with the installation of Enterprise Architecture Workspace store application.

List of scheduled jobs for Enterprise Architecture Workspace

Scheduled job	Description
Business Application Certification On Demand	Certifies the data in the Business Application [cmdb_ci_business_app] table when required.
Business Application Certification Quarterly	Certifies the data in the Business Application [cmdb_ci_business_app] table for every quarter.
Update Capability Hierarchies In Grid	Updates business capabilities hierarchy in the Business Portfolio page. A hierarchy ID is assigned to the newly created capability.
Populate Technology Lifecycle Risks	Populates the TPM technology lifecycle risks data in the TPM Technology Lifecycle Risks [sn_apm_tpm_technology_risk] table.
Populate TPM Discovered Technologies and Lifecycles	Populates the technology lifecycle data in the TPM Technology Lifecycle [sn_apm_tpm_technology_lifecycle] table. The data includes end of support date, end of extended support date, and end of life date for your software and hardware models. **Note:** The data for the software products is displayed only when the Software Asset Management (SAM) Foundation or Software Asset Management (SAM) Professional plugin is installed.
Populate TRM technical debts in the EA Workspace	Populates the latest technical debt data for your application portfolio the Technical Debt [sn_apm_trm_standards_technical_debt] table. **Note:** The *Populate TRM technical debts in the EA Workspace* scheduled job will be available only when the Software Asset Management (SAM) Foundation or Software Asset Management (SAM) Professional plugin is installed.

[End]

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Business stakeholder role for Enterprise Architecture Workspace

The Business Stakeholder (com.snc.business_stakeholder) plugin contains the business stakeholder role for Enterprise Architecture Workspace application. Users with this role can view or read records in the Enterprise Architecture Workspace.

Upgrade information

Upgrade customer

If you are upgrading to Washington DC, the business stakeholder role for Enterprise Architecture Workspace is available only when you activate Read only roles for Enterprise Architecture (com.snc.apm_read_roles) plugin.

New customer

If you are a new customer, the Read only roles for Enterprise Architecture (com.snc.apm_read_roles) plugin is activated on zBoot. However, the business stakeholder role for Enterprise Architecture Workspace is available only when you install Enterprise Architecture Workspace plugin.

Why business stakeholder read-only role

The Business Stakeholder role is designed to give users read-only access to all the tables within the Enterprise Architecture Workspace application. This role is ideal for business stakeholders, such as business owners or managers, who need to view data but should not have the ability to modify it. By assigning this role, you ensure that these users can stay informed and monitor the data without making any changes.

Business stakeholder read-only access limitations in Enterprise Architecture Workspace

Enterprise Architecture Workspace users with Business stakeholder role for Enterprise Architecture Workspace (sn_apm.apm_read) role have only view access to all the pages and they can't create or update any data in the Enterprise Architecture Workspace.

Exploring Enterprise Architecture Workspace

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

Accessing the workspace

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

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

Related topics

Enterprise Architecture Workspace access roles

Tables installed with Enterprise Architecture Workspace

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Scheduled jobs installed with Enterprise Architecture Workspace

Enterprise Architecture Workspace Overview

Enterprise Architecture Workspace Overview

The Enterprise Architecture Workspace has a consolidated user interface and designed for different user roles.

Highlights of the EA Workspace user interface

Consolidated User Experience

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

Designed for different user roles

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

Home page with different sections

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

Overview

The Overview page displays the following sections:

- **Insights**: Highlights various conditions for your application portfolio, business portfolio, information portfolio, and technology portfolio such as if business applications aren't related to a business capability.
- **Needs Attention**: Lists the tasks that you must act on. You can see the number of tasks for each tab.
  - The **My Approvals** tab lists the requests that are waiting for your approval.
  - The **My Requests** tab lists the requests that you have raised.
  - The **Certifications** tab lists the certification information used to keep your business applications inventory up to date by periodically certifying the data in the business applications table.
  - The **Assessments** tab lists the assessments for your applications that help you to evaluate and score your business applications based on qualitative inputs.
- **Portfolio Overview and Health**: Helps you to monitor your portfolio and its health.

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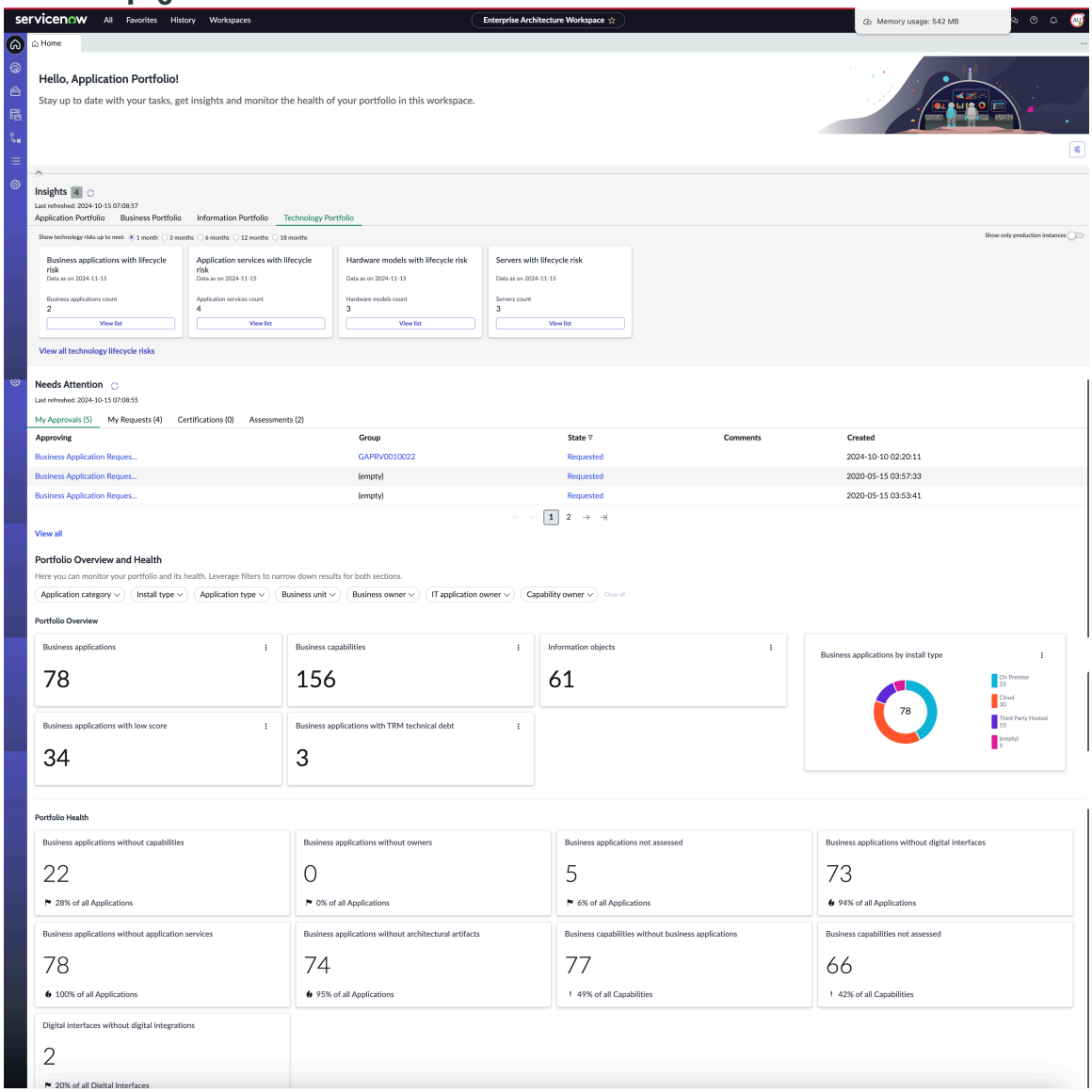
Overview page



Related topics

- Viewing insights of your portfolio
- Managing requests, certifications, assessments, and technology portfolio audit
- Working with the Enterprise Architecture Workspace dashboard
- Portfolio overview and health
- Managing a business portfolio
- Gantt view of TPM and TRM lifecycle timelines
- Rationalization of business applications
- Technology Portfolio view
- Portfolio list view
- Configure the Enterprise Architecture Workspace
- Work with the Setup page in the Enterprise Architecture Workspace
- Configure application total cost of ownership (TCO) in Enterprise Architecture Workspace
- Managing the Technology Portfolio Management (TPM) in Enterprise Architecture Workspace

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Personalize the Enterprise Architecture Workspace home page

Customize the sections that you want visible on the home page by using the personalize page feature.

Before you begin

You must have Enterprise Architecture Workspace version 2.2.0 to personalize the Enterprise Architecture Workspace home page.

Role required: sn_apm.apm_analyst

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Select the hide sections icon ( ) to open the Personalize Page window.
3. Use the toggle switches next to the relevant section names to conceal or display a particular section from the home page.
4. Select **Apply**.

Viewing insights of your portfolio

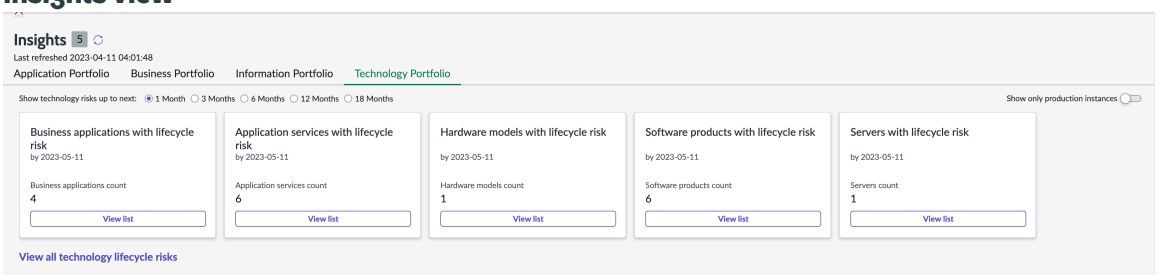
You can view the insights for your business portfolio, information portfolio, application portfolio, and technology portfolio.

You can see the details such as the following:

- Desired and scripted audits
- Hardware models
- Software products that are facing high and moderate technology risks
- Pending certification instances that are open and not 100% complete

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

Insights view



Application Portfolio

Track information for your business applications.

Business Portfolio

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

Information Portfolio

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

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Technology Portfolio

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

[store-future: BEGIN review]**Note:**
From EA Workspace version 3.0.3, you require the Technology Portfolio Management plugin (sn_apm_tpm) to view the Technology Portfolio information under the Insights section. To install the plugin, see Activate the Technology Portfolio Management (TPM) plugin.
[End]

Track technology risks

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

Show only production instances

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

View all technology lifecycle risks

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

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

Technology lifecycle risks

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

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Technology lifecycle risks (continued)

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

Managing requests, certifications, assessments, and technology portfolio audit

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

My requests

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

Certifications

The **Certifications** tab shows the list of certifications and their status. You must keep your business applications inventory up to date by certifying the data in the business applications table periodically. Keeping your business application data current helps you to assess your business applications precisely as there are indicators that are dependent on these business applications.

You can select **View All** to see the list of certifications. Select the certification number, certification schedule, and certification instance to see more details.

Assessments

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

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

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

Technology Portfolio audit

The#**Technology Portfolio Audit** tab shows audit information for your applications. An entry in this table indicates that at least one lifecycle for that software product or hardware model was either approximated, or not found, or doesn't exist. For example, if the software product full version is 9.2.1, it may be that the End of Support lifecycle version in the Software Asset Management Content library was only full version 9.2. This audit table helps you to evaluate the lifecycle matching information based on the details of the products being used in your organization. The table helps you to identify whenever an exact lifecycle version match or no valid lifecycle version could be found against the software product or hardware model version used in your organization.

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

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

Technology portfolio audit table

Column name	Description
Type	Application type. Choices are: • Software • Hardware
Software product	Name of the software product.
Product version	Version number of the product.
Product edition	Edition of the product. For example, Standard.
Product full version	Full version of the product.
Hardware model	Hardware model that is associated with the software product.
Verification status	Verification status of the product. Choices are: • Need to verify • Verified • Rejected
Comments	Customer comments.
Lifecycle phase	Lifecycle phase of the product.
Phase start date	Lifecycle phase start date.

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Technology portfolio audit table (continued)

Column name	Description
Edition	Edition of the lifecycle.
Full version	Full version of the lifecycle.
Match notes	Notes by the customer.
Technology lifecycle	TPM technology lifecycle information of the software product or hardware model.

Technical Debt

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

Technical Debt table

Column name	Description
TRM product	Name of the TRM product. A software product that is having version specific life cycles.
Business Application	Name of the business application associated with the TRM product.
Software product model	Name of the software product model related to the TRM product.
TRM phase	Phase of the TRM product. The following TRM phases are available from the base system: • Approved: The technology is approved for use. • Approved with Constraints: The technology can be used within the specified constraints specified in the comments. • Divest: A decision was taken to divest from the use of the technology. • Evaluation: This technology is being evaluated and can't be used to production purposes. • Unapproved: The technology isn't permitted to be used. **Note:** You can modify these phases from the EA Workspace > Setup > TRM Phases page.
TRM level	The level (Product or Product Lifecycle) at which the technical debt is created.

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Technical Debt table (continued)

Column name	Description
Version	Version of the software product. Usually, the name of the Software product model contains this version.
Reason	The reason to explain why the technical debt was created.
Last run	Shows the time stamp when the custom scheduled job *Populate TRM technical debts in the EA Workspace* is run to update the table with technical debt.

Update verification status

Change the verification status of a software product or hardware model lifecycle in the TPM technology lifecycle exception table.

Before you begin

Role required: sn_apm.apm_analyst

About this task

You can acknowledge a heuristic lifecycle match of a product by changing its status to verified or rejected.

Procedure

1. Navigate to **All** > **Application Portfolio Management** > **Enterprise Architecture Workspace** > **Workspace Home**.
2. In the Needs Attention section, select the **Technology Portfolio Audit** tab.
3. Open a product type (Software or Hardware) by selecting it.
4. In the TPM Technology Lifecycle Exception form, set the **Verification Status** to either **Verified** or **Rejected**.
   If the lifecycle phase is set to **Verified**, then the exception count is reduced in the Technology Lifecycle table. If the lifecycle phase is set to **Rejected**, then the exception count is reduced and dates for that lifecycle phase will not appear in the Technology Lifecycle table.
5. **Optional:** Add comments in the **Comments** box.
6. Select **Save**.

View or update your TRM requests

View all your product requests, product lifecycle requests, track their statuses, and edit your existing requests. You can also manage the approvers for your request

Before you begin

Role required: sn_apm.apm_user

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. In the Needs Attention section, select the **My Requests** tab.
   You can see the list of requests of requests that are raised by you.
3. Select a product request number to open it.
4. Update the details and select **Save**.

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Related topics

Managing the Technology Reference Model in Enterprise Architecture Workspace

Approve or reject TRM requests

As an Enterprise Architect, approve or reject a TRM product or product lifecycle requests submitted by other users.

Before you begin

The user must be part of the Enterprise Architect Group.

Role required: sn_apm.apm_analyst

About this task

When an Enterprise Architecture user requests for TRM product or TRM product lifecycle approval, an email notification is received by the approver. The approver belongs to the Enterprise Architect group.

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. In the Needs Attention section, select the **My Approvals** tab.
3. Select a product request number to open it.
4. Select **Approve** or **Reject**.
   You can also edit the request details such as Requested TRM phase, Category, and Business Justification and select **Save**.

Result

The requester receives an email notification for the approval or rejection.

Related topics

Managing the Technology Reference Model in Enterprise Architecture Workspace

Working with the Enterprise Architecture Workspace dashboard

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

As an enterprise architect, use the interactive filters to generate different graphical reports of the business applications for your portfolios. You can select a pie chart slice or graph bar to open a particular page and see the list of records under that category. To hide or show a slice in the pie chart, select its colored legend. Use the **Refresh** button to refresh the results of a pie chart.

End users and roles

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

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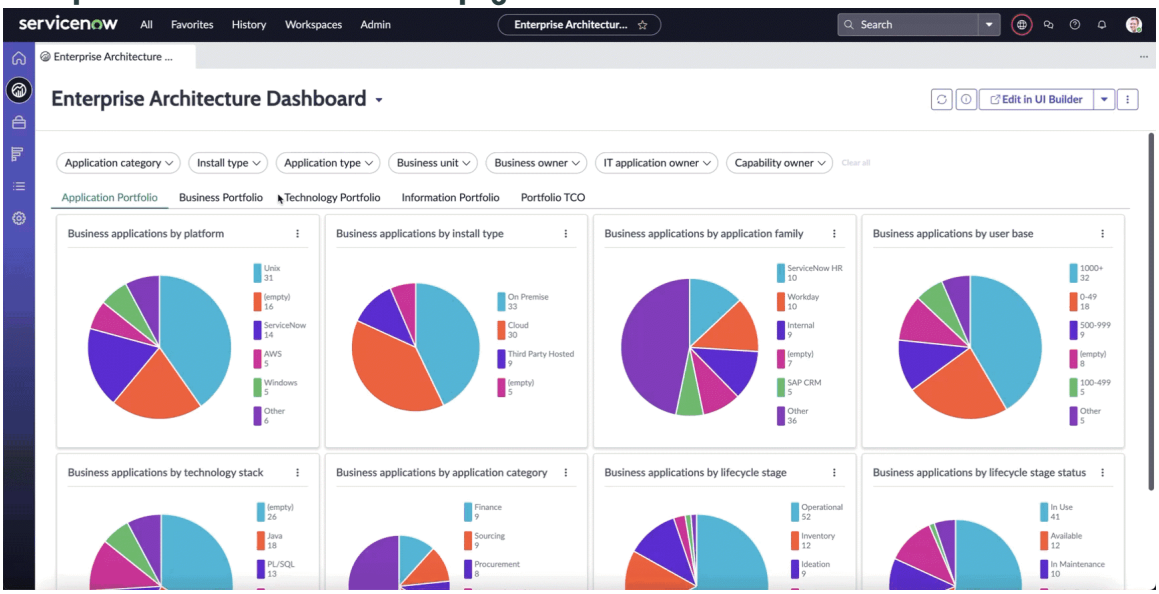
Enterprise Architecture Dashboard page



Data visualizations

The dashboards include the following visualizations.

Tab name	Visualization title	Visualization type	Description
Application Portfolio	Business applications by platform	Pie chart	Breakdown of the number of business applications categorized by their platform type, such as UNIX and AWS.
	Business application by install type	Pie chart	Breakdown of the number of business applications categorized by their installation type, such as On premise, Cloud, Third-party hosted, and so on.
	Business application by application family	Pie chart	Breakdown of the number of business applications categorized by their application family, such as Workday, Microsoft Office, ServiceNow HR.
	Business application by user base	Pie chart	Breakdown of the business applications by the number of users using the applications.

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Tab name	Visualization title	Visualization type	Description
	Business applications by technology stack	Pie chart	Breakdown of the number of business applications categorized by their technology, such as Java, Net, SQL.
	Business applications by application category	Pie chart	Breakdown of the number of business applications and their categories, such as Finance, Sourcing, Procurement.
	Business application by lifecycle stage	Pie chart	Breakdown of the number of business applications categorized by their lifecycle stage.
	Business application by lifecycle stage status	Pie chart	Breakdown of the number of business applications categorized by their lifecycle stage status.
	Digital interfaces by business applications	Pie chart	Breakdown of the number of digital interfaces categorized by their provider business application. This pie chart is displayed only when the Application Portfolio Management Digital Integration Management plugin is installed.
Business Portfolio	Business capabilities with low scores	Bar graph	Breakdown of the number of low-scoring capabilities of the organization.

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Tab name	Visualization title	Visualization type	Description
Technology Portfolio **Note:** [store-future: BEGIN review]From EA Workspace version 3.0.3, you require the Technology Portfolio Management plugin (sn_apm_tpm) and Application Portfolio Management - TRM plugin (snc.apm_trm) plugin to view the Technology Portfolio widgets. To install the plugins, see Activate the Technology Portfolio Management (TPM) plugin. [End] If both the plugins are inactive, the Technology Portfolio tab is not displayed.	TRM products by TRM phase	Pie chart	Breakdown of the number of Technology Reference Model (TRM) products categorized by their TRM phase.
	Approved software counts by TRM category	Pie chart	Breakdown of the software products categorized by their approved TRM phase.
	Top 10 business applications with highest TRM technical debt	Bar graph	The top 10 business applications having the highest TRM technical debt.
	Top 10 business applications with normalized TPM risk	Column chart	The top 10 business applications having normalized Technology Portfolio Management (TPM) risk.
Information Portfolio	Business applications by data classification	Pie chart	Breakdown of the number of business applications categorized by their data classification type, such as Internal, Confidential, Highly sensitive, Public.
	Information objects by data domain	Pie chart	Breakdown of the number of information objects categorized by their data domain, such as Personally identifiable information (PII),

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Tab name	Visualization title	Visualization type	Description
			Employees data, Payment card information (PCI).

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Tab name	Visualization title	Visualization type	Description
Portfolio TCO **Note:** • [store-future: BEGIN review]From EA Workspace version 3.0.3, you require the Total Cost of Ownership (sn_apm_tco) plugin to view the Portfolio TCO widgets. [End] • All monetary values are displayed in a single currency type. The currency conversion rates are contained in the Currencies table (fx_currency.list). The currency type is determined based on the geographical location from where you've logged in. For example, if the system detects that you've logged in to the EA workspace from the USA, the default currency displayed will be USD. • The duration of a fiscal period displayed on the widgets is determined from the `com.glide.fiscal_calendar.fiscal.unit` property.	Business application TCO for FY:Q (Current quarter)	Summary	The total cost of ownership value for all business applications, calculated for the current fiscal quarter.
	Business application TCO for FY:Q (Previous quarter)	Summary	The total cost of ownership value for all business applications, calculated for the previous quarter.
	Business application TCO trend for year	Line graph	The value of the total cost of ownership of business applications over a year.
	Business application TCO by application category	Column chart	Breakdown of the total cost of ownership values of business applications grouped by their category, such as IT Service Management, IT portfolio management, Human capital management. The chart compares the total cost of ownership for the current and previous quarter, side by side.
	Business application TCO by application planned disposition for FY:Q (Current quarter)	Horizontal bar graph	Breakdown of the total cost of ownership values of business applications categorized by their planned disposition status, for the current quarter.
	Business applications by TCO score	Column chart	Breakdown of the number of business applications categorized by their TCO score. The chart compares the total cost of ownership for the current and previous quarter, side by side. Business application TCO scores from 0 to 1 and 9 to10 are inclusive. That is, any number from 0 (starting point) until 1 (ending point) or from

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Tab name	Visualization title	Visualization type	Description
			Business application TCO scores from 1 to 9 are exclusive. That is it includes all numbers in the range up to but doesn't include the ending point. For example, an exclusive number range from 1 (starting point) to 2 (ending point) includes the number 1.1, 1.2, 1.3, 1.4, 1.5, 1.6, 1.7, 1.8, 1.9.
	Business application TCO by cost type and planned disposition for FY:Q (Current quarter)	Heat map	Breakdown of the total cost of ownership values associated with different application cost types in comparison to their application planned disposition state. On selecting any value on the heat map that is greater than zero, a list of business applications is displayed that are associated with that specific combination of cost type and planned disposition value. You can add your own cost types to measure application TCO. For details, see Create a cost type for Application TCO in Enterprise Architecture Workspace.
	Top 10 business applications with the highest cost for FY:Q (Current quarter)	List	A list of all business applications having the highest total cost of ownership values for the current quarter and the previous quarter. On selecting a total cost of ownership value, further details on that business application cost are displayed.

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

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

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

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

Working with the Application Assessments dashboard

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

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

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

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

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

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

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

- Application category
- Business process
- Business unit

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

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

View the performance of applications using the Application Assessments dashboard

Use the Application Assessments dashboard to view overview reports on the performance of the business applications.

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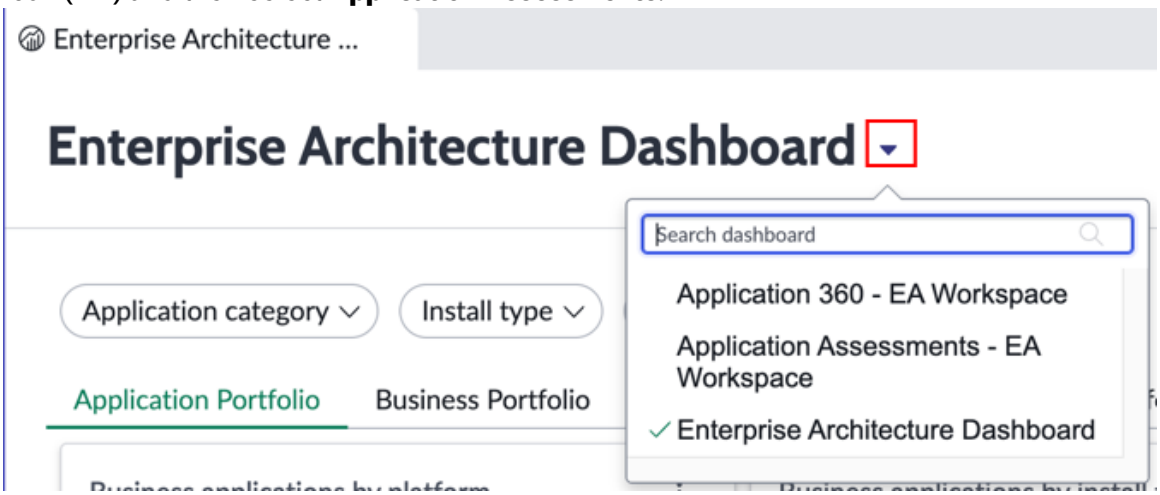
Before you begin

You must have Enterprise Architecture Workspace version 3.1.0 to view the Application Assessments dashboard in the Enterprise Architecture Workspace.

Role required: sn_apm.apm_analyst

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace** > **Workspace Home**.
2. Open the Enterprise Architecture Workspace Dashboard page by selecting the application dashboard icon ( ).
3. Open the Application Assessments dashboard page after selecting the change dashboard icon ( ) and then select **Application Assessments**.



4. Filter the data in the spline charts by selecting options from the **Application category**, **Business process**, and **Business unit** lists.

Note:
By default, scores for all applications are displayed in the widgets. You can select an application name to hide their score.

Working with the Application 360 dashboard in Enterprise Architecture Workspace

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

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

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

The Application 360 dashboard contains the following sections:

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

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

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- Application profile indicator
- Business application
- Fiscal period

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

Monitor performance in the Application 360 dashboard

Use the Application 360 dashboard to analyze indicator scores and identify business applications that require attention.

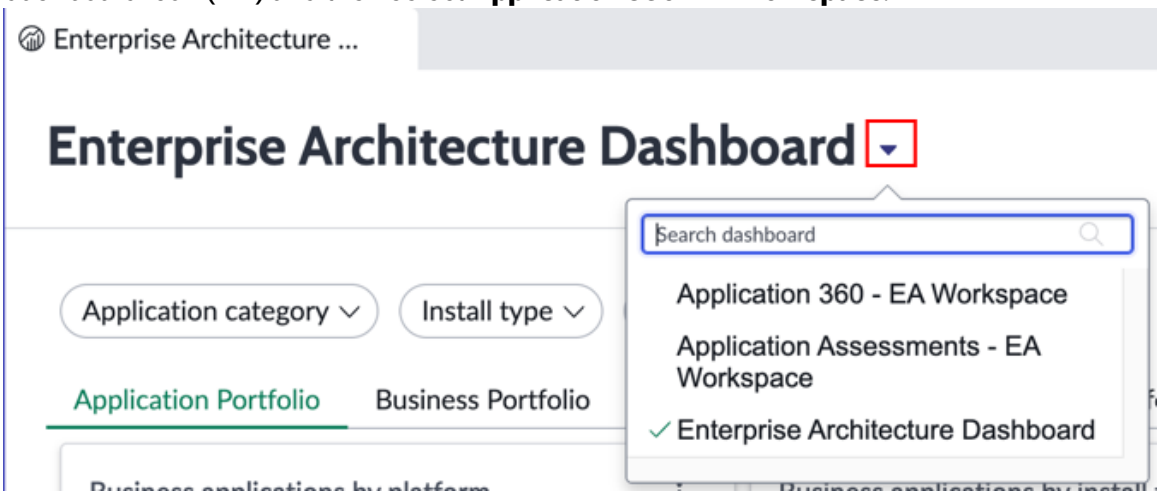
Before you begin

You must have Enterprise Architecture Workspace version 3.1.0 to view the Application 360 - EA Workspace dashboard in the Enterprise Architecture Workspace.

Role required: sn_apm.apm_analyst

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace** > **Workspace Home**.
2. Open the Enterprise Architecture Workspace Dashboard page by selecting the application dashboard icon ( ).
3. Open the Application 360 - EA Workspace dashboard page by selecting the change dashboard icon ( ) and then select **Application 360- EA Workspace**.



4. From the Business Application list, select the business application that you want to analyze indicator details for.
5. From the Breakdown list, select the type of breakdown that you want to see the trend and distribution details for.

Portfolio overview and health

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

Portfolio overview

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

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The following cards are displayed:

- Business Applications
- Business Capabilities
- Information Objects
- Business Applications with High Risk

> [store-future: BEGIN review]**Note:**
> Note: From EA Workspace version 3.0.3, you require the Technology Portfolio Management plugin (sn_apm_tpm) to view the Business Applications with High Risk card under the Portfolio Overview section. To install the plugin, see Activate the Technology Portfolio Management (TPM) plugin.
> [End]

- Business Applications with Low Score: Number of business applications with low score for a quarterly fiscal period.
- Business Applications with TRM technical debt: Number of business applications that aren't aligned with the TRM phases and standards.
- Business Applications by Install Type

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

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

Portfolio health

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

The following cards are displayed:

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

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- Business Capabilities without Business Applications
- Business Capabilities not Assessed

The following cards are displayed only when the Application Portfolio Management Integration Management plugin (com.snc.apm_digital_integration) is installed:

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

Managing a business portfolio

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

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

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

- Capabilities: Total number of business capabilities.
- Leaf Capabilities: Total number of capabilities at the leaf level (that have no child capabilities of its own) in all the hierarchies of the business capabilities listed.
- Assessed: Total number of assessed business capabilities.
- Not Assessed: Total number of capabilities that haven't been assessed.
- Major Gap: Total number of capabilities with a score in the range of 1-4.
- Medium Gap: Total number of capabilities with a score in the range of 4-7.
- No Gap: Total number of capabilities with a score in the range of 7-10.

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

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

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

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

Add a business capability

Add a business capability to the capability hierarchy map.

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Before you begin
Role required: sn_apm.apm_analyst

Procedure

1. Navigate to **All** > **Application Portfolio Management** > **Enterprise Architecture Workspace** > **Workspace Home**.
2. Open the Business Capability Hierarchy page by selecting the Business Portfolio icon ( ).
3. Select **New Capability**.
4. On the form, fill in the fields.
   For a description of field values, see Business capability new record form.
5. Select **Create**.
6. Create a child capability for the capability that you created.
   a. Right-click on the hierarchy ID of the capability.
   b. Select **Create sub-capability**.

Create a demand towards achievement of a capability

Use a demand as a step to identify cost-saving opportunities on capabilities, to meet the target. The strategy that you associate with the demand action decides the strategy for the capability.

Before you begin
Role required: sn_apm.apm_user

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Business Capability Hierarchy page by selecting the Business Portfolio icon ( ).
3. Select the row context menu icon ( ) and select **Create Demand**.
4. Select **Open in new tab**.
5. On the form, fill in the fields.
   For a description of the field values, see Demand form.
6. Select **Save** to save the record and remain on the same form to add more details to the demand.

Update the hierarchy of a business capability

Assign a hierarchy ID to a business capability.

Before you begin
Role required: sn_apm.apm_analyst

Procedure

1. Navigate to **All** > **Application Portfolio Management** > **Enterprise Architecture Workspace** > **Workspace Home**.
2. Open the Business Capability Hierarchy page by clicking the Business Portfolio icon ( ).
3. Select **Update Hierarchies**.
   A scheduled job is submitted to update the business capabilities hierarchy. Use the refresh button to see the updated hierarchy.

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Result
A hierarchy ID is assigned to the newly created capability.

Related topics
View all capability indicators

Add or edit a capability indicator

Create a sub-capability

Add a sub-capability to the capability hierarchy map.

Before you begin
Role required: sn_apm.apm_user

Procedure
1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Business Capability Hierarchy page by selecting the Business Portfolio icon ( ).
3. Select the row context menu icon ( ) and select **Create sub-capability**.
4. On the form, fill in the fields.
   For a description of the field values, see Create a sub-capability form.
5. Select **Create**.

Assign a business application

Assign a business application to a capability to relate the capability with the application.

Before you begin
Role required: sn_apm.apm_user

Procedure
1. Navigate to **All** > **Application Portfolio Management** > **Enterprise Architecture Workspace** > **Workspace Home**.
2. Open the Business Capability Hierarchy page by selecting the Business Portfolio icon ( ).
3. Select the row context menu icon ( ) and select **Assign business application**.
4. Select a business application.
5. Select **Assign**.

Delete a capability from the hierarchy

Delete a capability that you no longer require.

Before you begin
Role required: admin

Procedure
1. Navigate to **All** > **Application Portfolio Management** > **Enterprise Architecture Workspace** > **Workspace Home**.
2. Open the Business Capability Hierarchy page by clicking the Business Portfolio icon ( ).

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3. Right-click the hierarchy ID of a capability that you want delete, then select **Delete**
4. Confirm the deletion.

Unassign a business application from a capability

You can unassign a business application from a capability.

Before you begin

Role required: sn_apm.apm_user

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Business Capability Hierarchy page by selecting the Business Portfolio icon ( ).
3. Select the expand row icon ( ) next to the relevant business capability.
4. Select the row context menu icon ( ) next to the relevant business application and select **Unassign business application**.

View a roadmap of a business capability

View the roadmap of your business capabilities and align them with the organization's strategy. Creating a portfolio plan helps you plan, prioritize, and roadmap the work for your business capability.

Before you begin

Ensure that the Strategic Planning plugin (com.sn_apw_advanced) (v4.0.2 or later) is installed.

Role required: sn_apm.apm_user and sn_align_core.apw_user

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Business Capability Hierarchy page by selecting the business portfolio icon ( ).
3. Select the row context menu icon ( ) and select **View roadmap**.
   You're navigated to the Planning page of the Strategic Planning Workspace. A temporary portfolio plan is created in the Strategic Planning Workspace with all the planning items that are associated with the business capability, sub-capabilities, and associated business applications.

   Note:
   The temporary portfolio plan is meant for preview purpose only. To plan, prioritize, and roadmap the work for your business capability, copy the temporary portfolio plan or create one.

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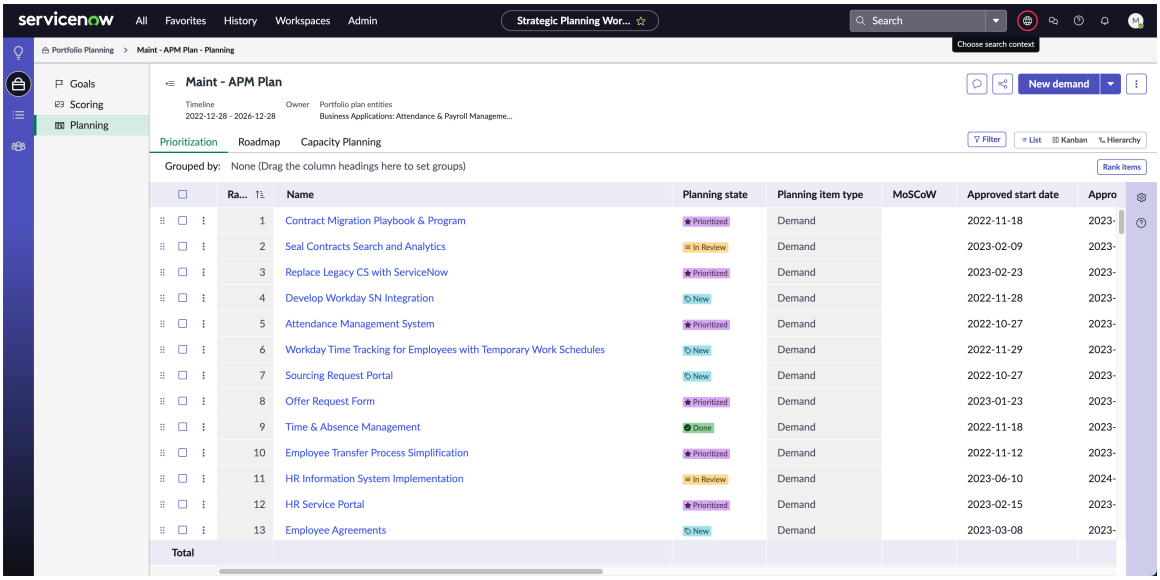

4. **Optional:** Copy the portfolio plan for your business capability to plan, prioritize, and roadmap the work for your business capability.

   a. From the portfolio plan header, select the more actions icon ( ) and then select **Copy portfolio plan**.

   b. On the Copy portfolio plan window, fill in the details.

      i. Enter a name for the portfolio plan in the#**Portfolio plan name** field.

      ii. (Optional)#Grant access to the users of the portfolio plan by selecting the **Share with same users and groups** option.

   c. Select **Confirm**.

   Alternatively, you can also create your own portfolio plan in the Strategic Planning Workspace (SPW) using the Business Capability lens. For more information, see Create a portfolio plan in Strategic Planning.

Gantt view of TPM and TRM lifecycle timelines

A Gantt chart in the Enterprise Architecture Workspace is a visual representation of the Technology Portfolio Management (TPM) and Technology Reference Model (TRM) timelines of business applications, and their associated application services like software products and hardware models.

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

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

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- **Autofit**

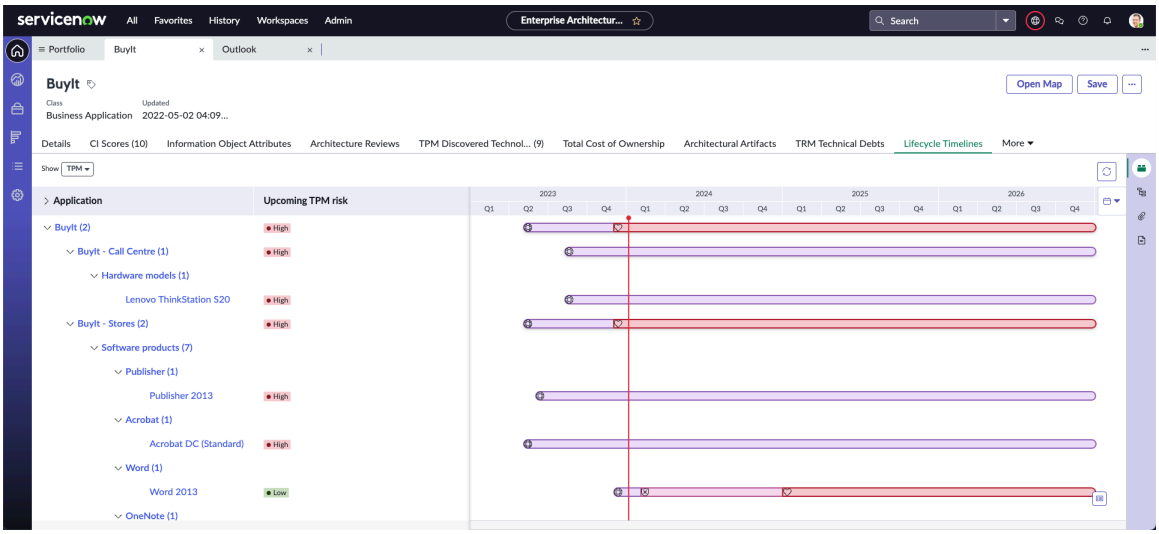
Note:
Autofit is selected by default.

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

TPM lifecycle timelines on Gantt chart

For Technology Portfolio Management (TPM), the business applications and their related application services (associated hardware models and software products) are displayed in a hierarchical structure. The corresponding timelines of the application services are displayed as bars on the Gantt chart. It also displays the data for lifecycles with wild card versions. The TRM wildcard version ends with a '*'.

TPM Gantt chart view



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

[store-future: BEGIN review]**Note:**
From EA Workspace version 3.0.3, you require the Technology Portfolio Management plugin (sn_apm_tpm) to view TPM lifecycle timelines in the Gantt chart. To install the plugin, see Activate the Technology Portfolio Management (TPM) plugin.
[End]

It displays the following TPM phase-related information:

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

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

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

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

Lifecycle end-date calculation logic

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

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

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

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

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

Application service and business application timelines

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

For example, let's assume that all hardware models and software products have lifecycle dates for the TPM phases that are end of support, end of extended support, and end of life. Now, application service A consists of one software product and one hardware model. The end of support start date phase of the software product is 12/01/2023 and the end of support start date of the hardware model is 12/15/2023. In this scenario, the end of support start date of the software product that is 12/01/2023 will be considered as the TPM phase start date of that application service and accordingly the Gantt chart bar for that application service will start from 12/01/2023.

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

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TPM risk calculation

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

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

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

Color coding

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

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

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

TRM lifecycle timelines on Gantt chart

For Technology Reference Model (TRM), the application services (hardware models and software products) are displayed in a hierarchical structure, similar to the TPM view. The corresponding lifecycle timelines of the application services are displayed as bars on the Gantt chart.

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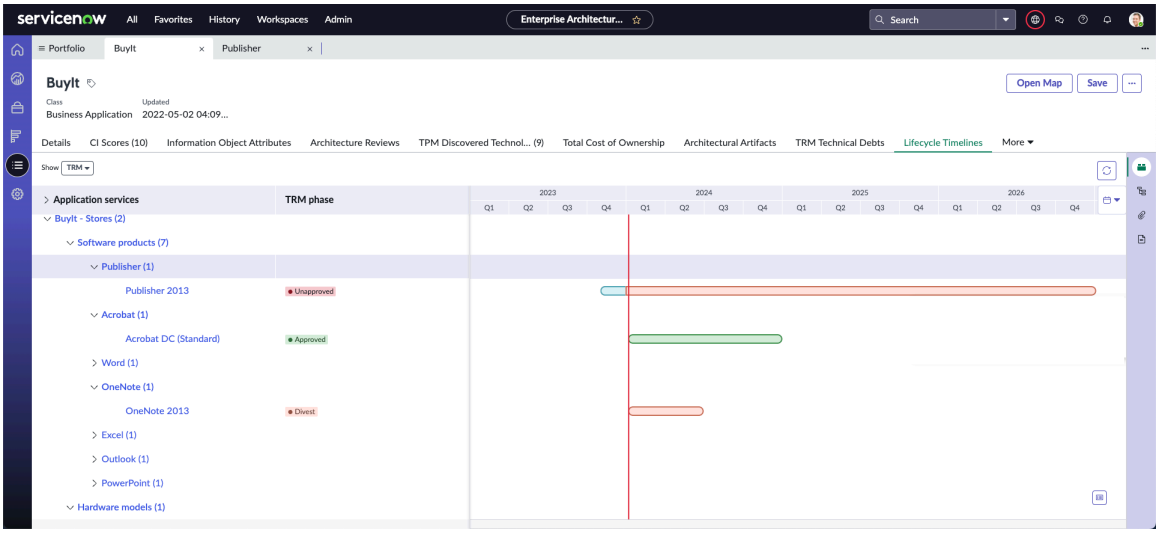
TRM Gantt chart view



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

It displays the following TRM related information:

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

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

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

TRM phase status

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

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

Also, if a TRM product phase doesn't have the **Production approved** check box (**Enterprise Architecture Workspace** > **Setup** > **TRM Phases**) selected, then the TRM phase column displays the status of the application service having that TRM phase as **Unapproved**. For details on how to approve a TRM phase, see Add or edit a TRM phase.

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

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

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

For details on TRM technical debts, see Manage Technology Reference Model (TRM) technical debt.

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

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Lifecycle end-date calculation logic

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

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

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

Application service timelines

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

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

  Or the TRM product **Name**, **Version**, and **Edition** values for that particular software product as defined in the TPM Technology Lifecycle table (sn_apm_tpm_technology_lifecycle) should match the **TRM Product**,**Version**, and **Edition** values that are entered while creating the TRM lifecycle for that product.

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

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

For details on how to create a TRM product lifecycle request, see Add a TRM product lifecycle.

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

Color coding

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

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

View TPM and TRM lifecycle timelines on the Gantt chart

Use the Gantt chart to view and track Technology Portfolio Management (TPM) and Technology Reference Model (TRM) lifecycle timelines.

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Before you begin

Role required: sn_apm.apm_analyst

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

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace** > **Workspace Home**.
2. Open the Portfolio List view by selecting the portfolio icon .
3. Next to **Business Applications**, select the expand row icon ( ) and then select **All**.
4. Select **All**.
5. Select the business application that you want to view the TPM and TRM lifecycle timelines for.
6. Select **More** if you don't see the **Lifecycle Timelines** tab.
7. Select **Lifecycle Timelines**.
   The Gantt chart appears for TPM and shows the business applications along with their application services.

   Note:

   By default, the TPM view is displayed.

8. Next to the business application and its associated application services, select the expand row icon ( ) to see the lifecycle timeline bars in the Gantt chart.
   Alternatively, you can select the expand icon ( ) next to the Application column header.

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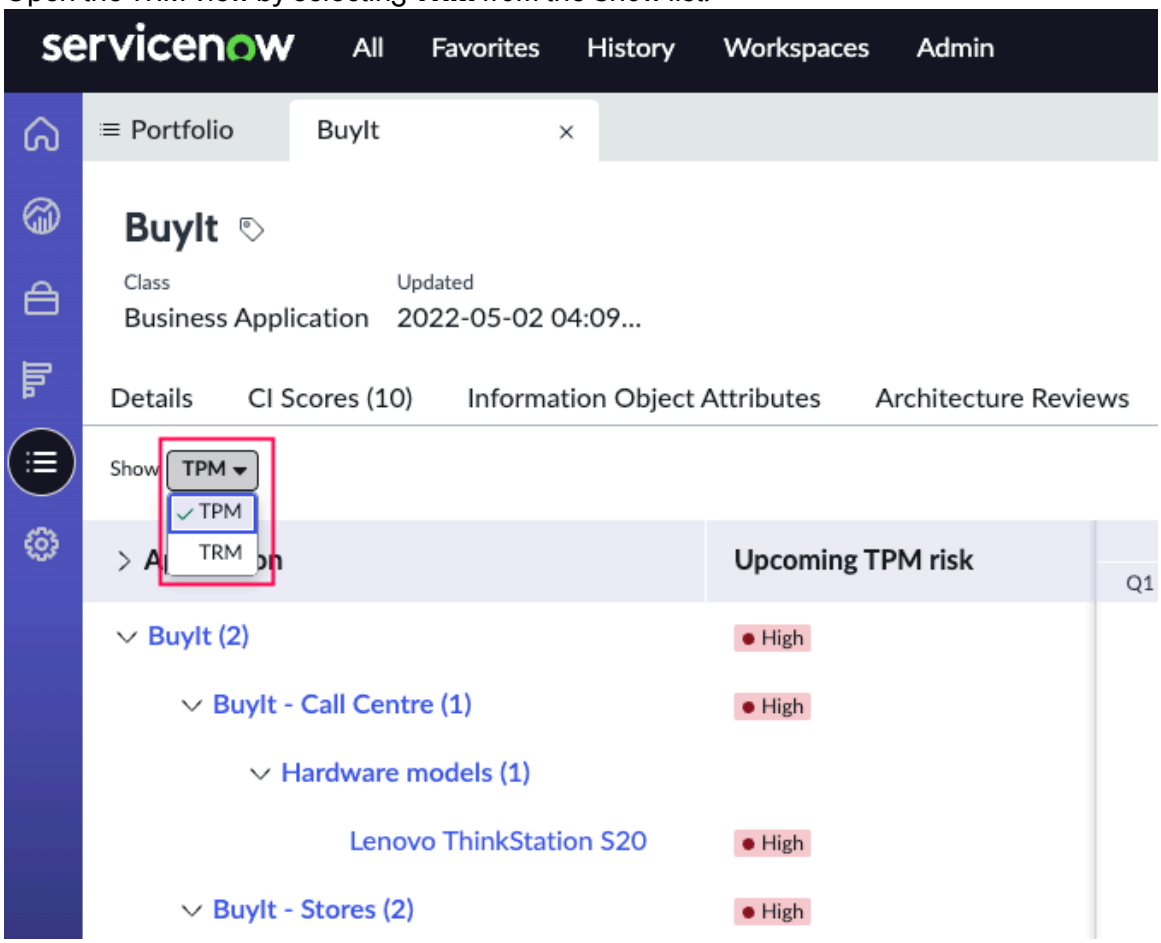
9. Open the TRM view by selecting **TRM** from the Show list.



Rationalization of business applications

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

Application rationalization overview

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

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

You can perform the following using application rationalization:

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

Use the following filters to narrow down the list of business applications:

- Fiscal Period
- Application Category
- Application Family

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- Business Capability

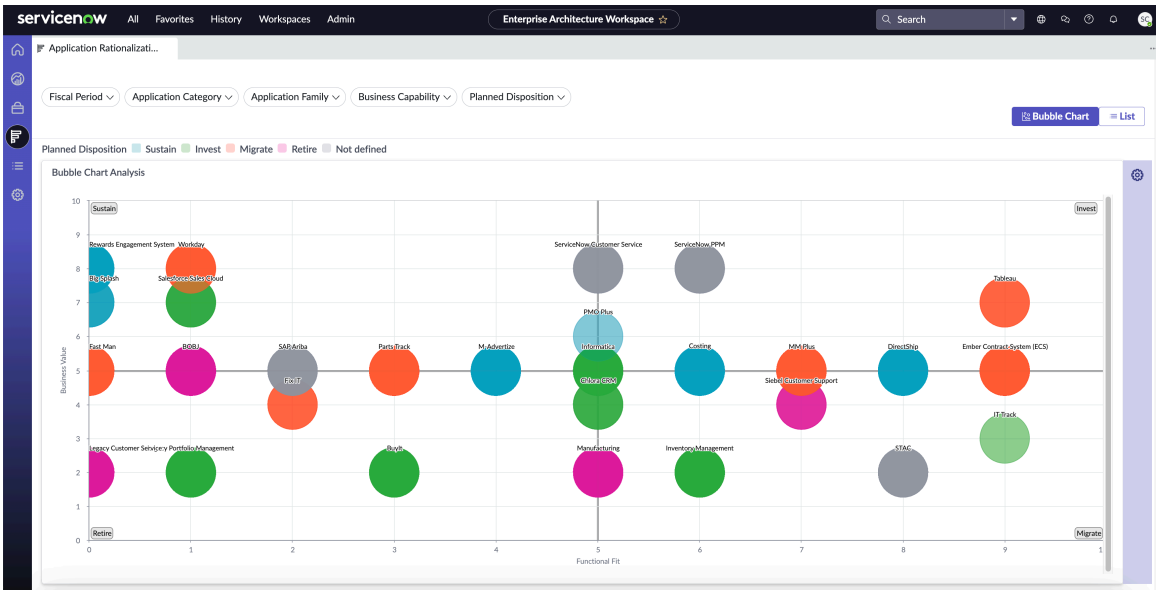
> **Note:**
> On applying this filter, all business applications including the ones associated with the child capabilities of the parent capability are displayed.

- Planned Disposition

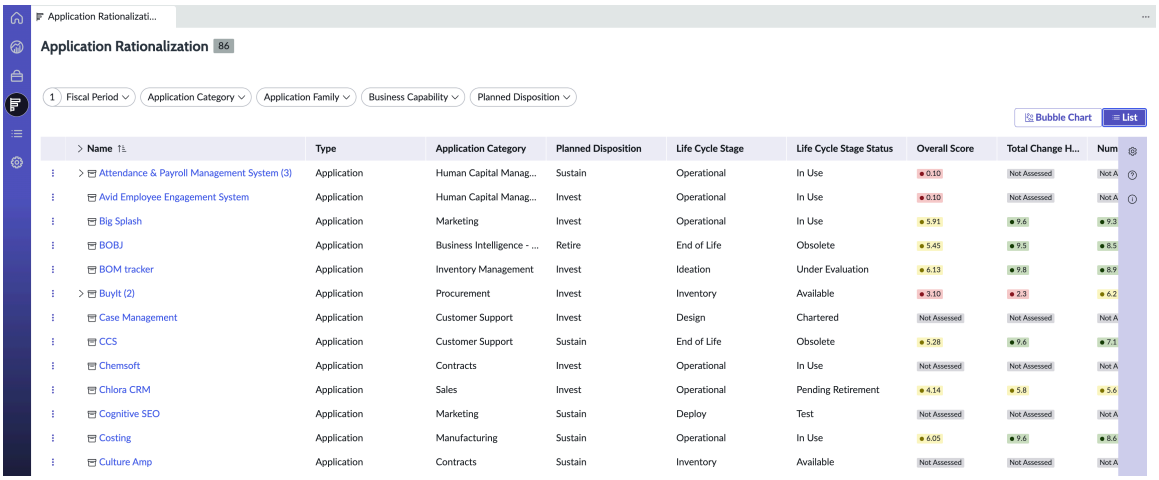
You can view all the business applications in a bubble chart view or in a list view.

> **Note:**
>
> You need Enterprise Architecture Workspace version 2.2.0 to view the Application Rationalization page.

Bubble chart view



List view



Application rationalization insights on the Enterprise Architecture Workspace home page

The application rationalization feature of Application Portfolio Management also provides insights for your business applications. To see the insight cards, navigate to **Workspaces** >

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Enterprise Architecture Workspace and select the Insights section. The insights cards display information based on scores derived from application rationalization. The following insight cards are available:

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

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

All the indicator scores are displayed according to the latest fiscal period, by default. The latest fiscal period is derived from the apm_app_indicator_score list. The duration of a fiscal period is derived from the system property *`com.glide.fiscal_calendar.fiscal_unit`*.

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

Bubble chart view of application rationalization

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

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

Note:

You need Enterprise Architecture Workspace version 2.2.0 to view the Application Rationalization page.

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

Note:

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

Select the application rationalization icon ( ) to view the bubble chart view of all business applications.

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The bubble chart page has the following components:

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

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

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

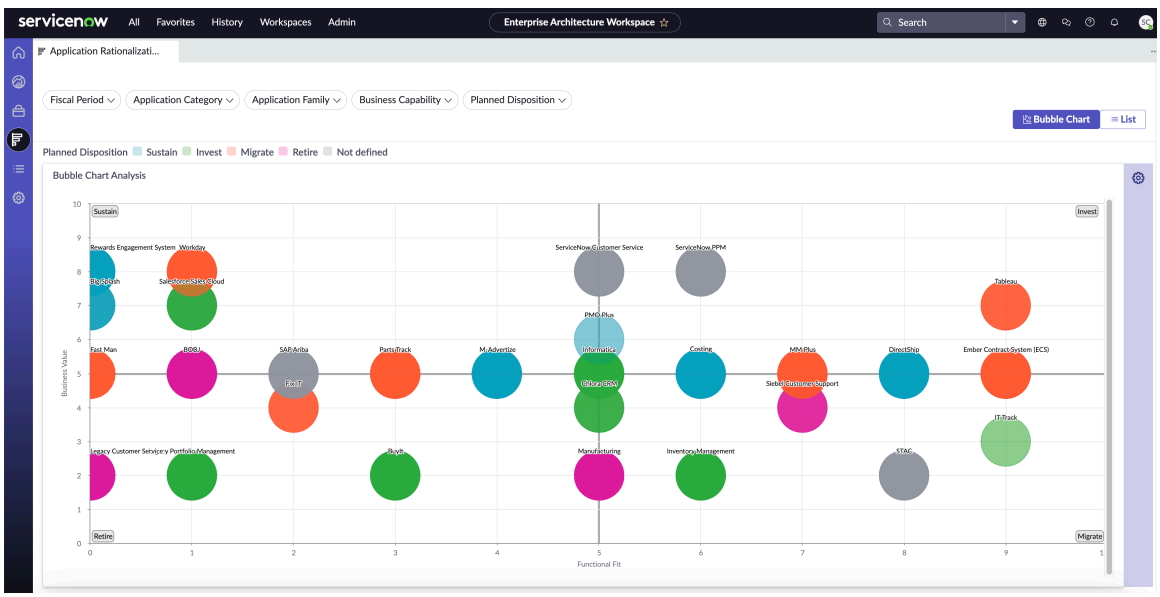
All the indicator scores are displayed according to the latest fiscal period, by default. The latest fiscal period is derived from the apm_app_indicator_score list. The duration of a fiscal period is derived from the system property `com.glide.fiscal_calendar.fiscal_unit`. However, the fiscal period can be changed using the filter available on the Application Rationalization screen and other filters may also be applied.

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

- Create a demand for a business application.
- Set the planned disposition of a business application.
- Add business application lifecycle data.

The bubble chart displays up to only 100 bubbles representing business applications. If you have more than 100 bubbles, a message appears. Use the available filters to reduce the number of applications or view the data in the list view.

Bubble chart view



Analyze applications using the bubble chart

Consolidate and analyze the business applications based on multiple scores.

Before you begin

You need Enterprise Architecture Workspace plug-in version 2.2.0 to view the Application Rationalization page.

Role required: sn_apm.apm_analyst

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About this task

You can narrow down the number of business applications that may be viewed, based on their application indicator scores.

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Application Rationalization page by selecting the application rationalization icon ( ).
3. Modify the bubble chart parameters as required by selecting the settings icon ( ).

   The following settings are available for modification:

   - X and Y axis: Dimension of the indicators that fall into the X and Y-axis. The available options are derived from the Application Bubble Charts table [apm_bubble_chart.List]. The indicator scores are gathered from the Indicator Scores table (apm_app_indicator_score).

     Note:

     - For details on how to add the X and Y-axis indicators of the bubble chart, see Create or edit a bubble chart for application strategies.
     - For a bubble to be displayed on the bubble chart, the indicator scores for the selected fiscal period must be available for both X and Y-axis indicators.

   - Bubble size: The bubble size is based on indicators related to business applications. The indicator scores determine the size of the bubble.

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

     Note:

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

   - Bubble color: The bubble color is based on the planned disposition value of the application. You can refer to the legend displayed on the bubble chart to see the significance of each color.

     Note:
     The bubble color settings can't be modified.

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- Bubble labels: Enable the toggle to display the bubble labels in the bubble chart. The bubble labels represent the business application names.

  Note:
  The bubble chart displays up to only 100 bubbles representing business applications. If you have more than 100 bubbles, a message appears. Use the available filters to reduce the number of applications or view the data in the list view.

4. Select **Apply**.

Create a demand using the bubble chart

Create a demand for an application from the bubble chart.

Before you begin

You need Enterprise Architecture Workspace version 2.2.0 to view the Application Rationalization page.

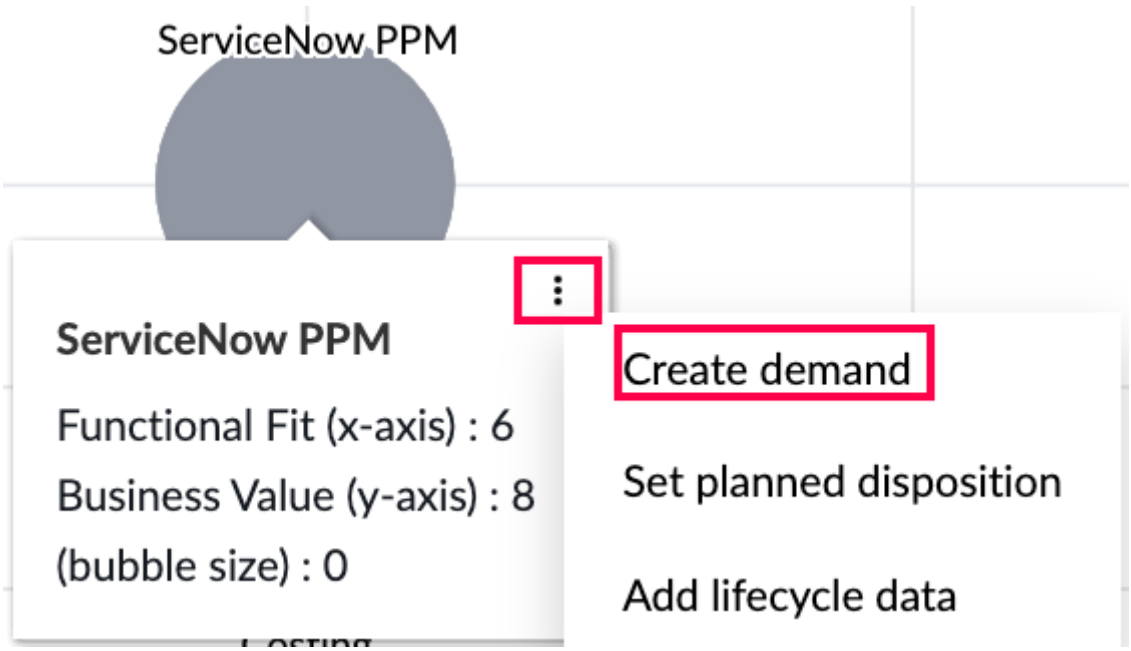
Role required: sn_apm.apm_analyst

About this task

Use a demand as a step to identify cost-saving opportunities on the business applications and meet your targets. The strategy that you associate with the demand action decides the strategy for the application.

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Application Rationalization page by selecting the application rationalization icon ( ).
3. Select the bubble for the relevant application that you want to create a demand for.
4. In the pop-up window, select the context menu icon (⋮) and select **Create demand**.



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5. On the Create demand form, fill in the fields.
   For a description of the field values, see Create demand form.
6. Select **Create**.

Set the planned disposition of a business application

Set the planned disposition of a business application to track decisions on the future planning of the application.

Before you begin

You need Enterprise Architecture Workspace version 2.2.0 to view the Application Rationalization page.

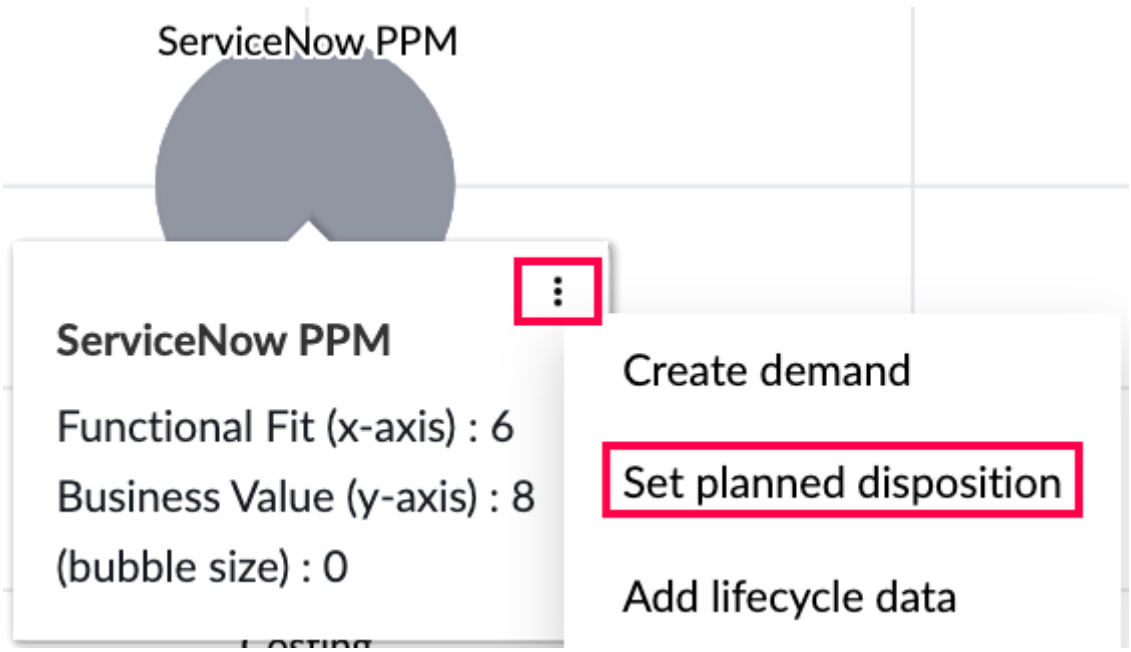
Role required: sn_apm.apm_analyst

About this task

Setting the planned disposition of a business application results in better data maintenance, improved data findability, and better management of application maintenance costs.

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Application Rationalization page by selecting the application rationalization icon ( ).
3. Select the bubble for the relevant application that you want to set the planned disposition for.
4. In the pop-up window, select the context menu icon (⋮) and select **Set planned disposition**.



5. In the Set planned disposition window, do the following:
   a. Select the planned disposition status from the Planned disposition drop-down list.
   b. Enter the justification for selecting that planned disposition status in the **Reasoning** field.
6. Select **Update**.

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Add business application lifecycle data using the bubble chart

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

Before you begin

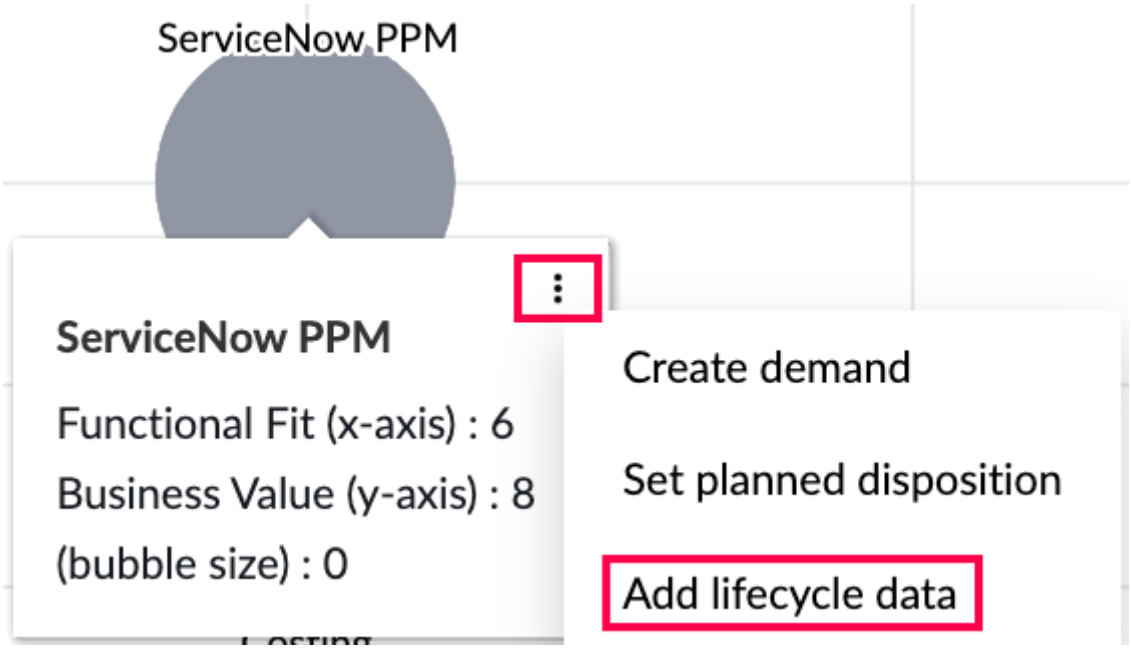
You need Enterprise Architecture Workspace version 2.2.0 to view the Application Rationalization page.

The application model (field name: Model ID) is required to create an application model lifecycle for a business application. The application model ID can either be entered manually or can be automatically created and added to the business application by executing or scheduling the *`CSDM Product Model Assignment`* script. For details on how to run the *`CSDM Product Model Assignment`*script, see Run a scheduled job to generate an application model for business applications.

Role required: sn_apm.apm_analyst

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Application Rationalization page by selecting the application rationalization icon ( ).
3. Select the bubble for the relevant application that you want to add business application life-cycle data for.
4. In the pop-up window, select the context menu icon (⋮) and select **Create lifecycle data**.



5. On the Application model life-cycle details form, fill in the fields.
   For a description of the field values, see Application model life-cycle details form.
6. Select **Create**.

List view of application rationalization

As an Enterprise Architect, you can view the list of all business applications.

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

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

Note:

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

You can select the name of a business application to open it and view its associated details.

Also, you can select the expand row icon ( ) to see the demands and projects associated with that business application. On selecting a demand or a project, its details are displayed. You can modify business application details and its associated demand and project details, as required.

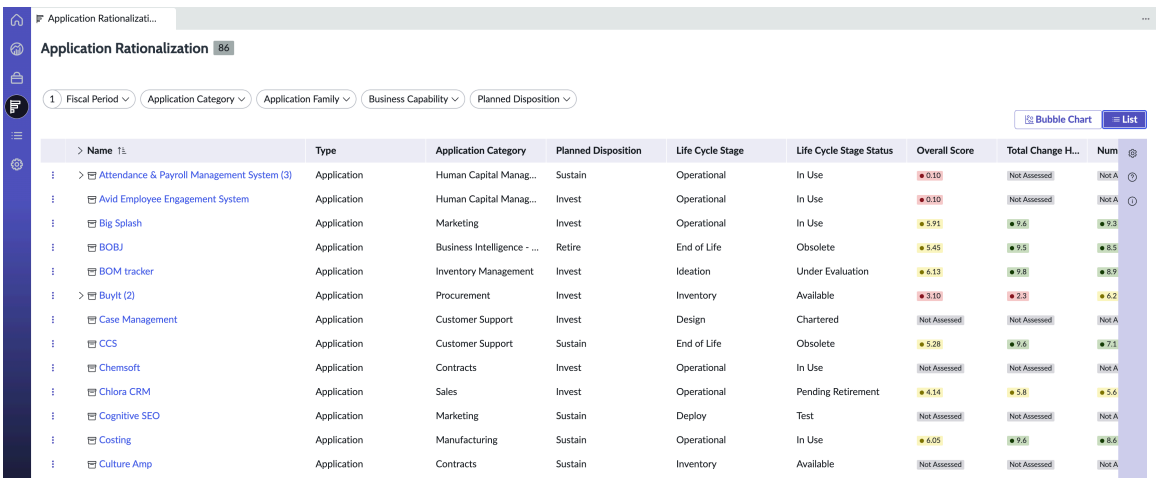
Note:
You need Enterprise Architecture Workspace plugin version 2.2.0 to view the Application Rationalization page.

All the indicator scores are displayed according to the latest fiscal period, by default. The latest fiscal period is derived from the apm_app_indicator_score list. The duration of a fiscal period is derived from the system property *com.glide.fiscal_calendar.fiscal_unit*.

You can perform the following from the list view:

- Edit business application details
- Create a demand for a business application
- Set the planned disposition of a business application
- Add the business application lifecycle data

List view



Create a demand using the list view

Create a demand for an application from the list view.

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Before you begin
You need Enterprise Architecture Workspace version 2.2.0 to view the Application Rationalization page.

Role required: sn_apm.apm_analyst

About this task
Use a demand as a step to identify cost-saving opportunities on the business applications and meet your targets. The strategy that you associate with the demand action decides the strategy for the application.

Procedure
1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Application Rationalization page by selecting the application rationalization icon ( ).
3. Select **List**.
4. Select the row context menu icon (⋮) next to the business application that you want to create a demand for and select **Create demand**.
5. On the Create demand form, fill in the fields.
   For a description of the field values, see Create demand form.
6. Select **Create**.
   The new demand is displayed under the business application.

Set the planned disposition of a business application

Set the planned disposition of a business application to track future decisions on the application.

Before you begin
You need Enterprise Architecture Workspace version 2.2.0 to view the Application Rationalization page.

Role required: sn_apm.apm_analyst

About this task
Setting the planned disposition of a business application results in better data maintenance, improved data findability, and better management of application maintenance costs.

Procedure
1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Application Rationalization page by selecting the application rationalization icon ( ).
3. Select **List**.
4. Select the row context menu icon (⋮) next to the business application that you want to set the planned disposition status for and select **Set planned disposition**.
5. In the Set planned disposition window, do the following:
   a. Select the planned disposition status from the Planned disposition drop-down list.
   b. Enter the justification for selecting that planned disposition status in the **Reasoning** field.
6. Select **Update**.

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Add business application lifecycle data using the list view

Create or edit the life cycle of a business application to better manage the business application.

Before you begin

You need Enterprise Architecture Workspace version 2.2.0 to view the Application Rationalization page.

The application model (field name: Model ID) is required to create application model life cycle for a business application. The application model ID can either be entered manually or can be automatically created and added to the business application by executing or scheduling the *CSDM Product Model Assignment* script. For details on how to run the *CSDM Product Model Assignment* script, see Run a scheduled job to generate an application model for business applications.

Role required: sn_apm.apm_analyst

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Application Rationalization page by selecting the application rationalization icon ( ).
3. Select **List**.
4. Select the row context menu icon (⋮) next to the business application that you want to add business application lifecycle data for and select **Add lifecycle data**.
5. On the Application model lifecycle details form, fill in the fields.
   For a description of the field values, see Application model life-cycle details form.
6. Select **Create**.

Edit business application details

You can make updates to the business application record directly from the list, without leaving the list view.

Before you begin

You need Enterprise Architecture Workspace version 2.2.0 to view the Application Rationalization page.

Role required: sn_apm.apm_analyst

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Application Rationalization page by selecting the application rationalization icon ( ).
3. Select **List**.
4. Select the business application that you want to edit details for.

   A new pane appears on the List view screen and the details of the business application are displayed.

   Note:
   Select **Full details** to view more details about the business application.

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5. On the Business application form, fill in the fields.

   For a description of the field values, see Business application form.

6. Select **Update**.

Edit a demand associated with a business application

Use application rationalization to edit existing demands associated with business applications.

Before you begin

You need Enterprise Architecture Workspace version 2.2.0 to view the Application Rationalization page.

You can make updates to the demand record directly from the list without leaving the list view.

Role required: sn_apm.apm_analyst

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Application Rationalization page by selecting the application rationalization icon ( ).
3. Select **List**.
4. Select the expand row icon ( ) next to the business application that you want to edit the associated demand details for.
   A list of demands associated with that business application is displayed.
5. Select the demand that you want to edit.
   A new pane appears on the List view screen and the details of the demand are displayed.

   Note:
   Select **Full details** to view more details regarding the demand.

6. On the Edit demand form, fill in the fields.
   For a description of the field values, see Demand form.
7. Select **Update**.

Edit a project associated with a business application

Use application rationalization to edit existing projects associated with business applications.

Before you begin

You need Enterprise Architecture Workspace version 2.2.0 to view the Application Rationalization page.

You can make updates to the demand record directly from the list without leaving the list view.

Role required: sn_apm.apm_analyst

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Application Rationalization page by selecting the application rationalization icon ( ).

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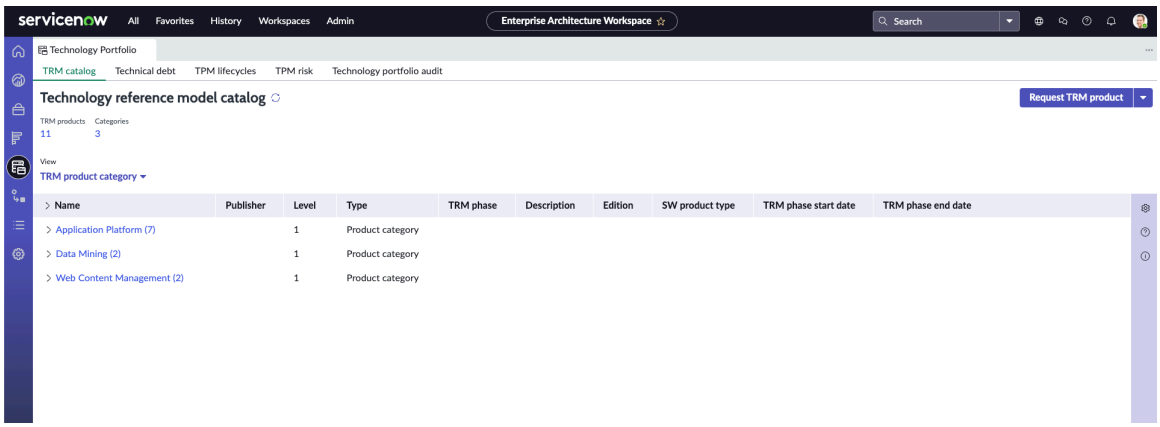
3. Select **List**.
4. Select the expand row icon ( ) next to the business application that you want to edit the associated project details for.
   A list of projects associated with that business application is displayed.
5. Select the project that you want to edit.
   A new pane appears on the List view screen and the details of the project are displayed.

   Note:
   Select **Full details** to view more details about the project.

6. On the Edit a project form, fill in the fields.
   For a description of the field values, see Edit a project form.
7. Select **Update**.

Technology Portfolio view

As an Enterprise Architect, use the Technology Portfolio list view in the Enterprise Architecture Workspace to manage your Technology Portfolio Management (TPM) lifecycles and risk and your Technology Reference Model (TRM) catalog (software and hardware).



Technology Portfolio Management

You can use Technology Portfolio Management to manage technology life-cycle risks and technology life-cycle exceptions.

For more information on Technology Portfolio Management, see Managing the Technology Portfolio Management (TPM) in Enterprise Architecture Workspace.

Technology Reference Model

You can use the Technology Reference Model feature to define the standards for your software and hardware products and manage unapproved products in your organization.

For more information on Technology Reference Model, see Managing the Technology Reference Model in Enterprise Architecture Workspace.

You can see the following tabs on the Technology Portfolio page:

- **TRM catalog**
- **Technical Debt**
- **TPM lifecycles**

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- **TPM risk**
- **Technology portfolio audit**

Managing the Technology Reference Model in Enterprise Architecture Workspace

You can use the Technology Reference Model (TRM) feature in Enterprise Architecture Workspace to define the standards for your software and hardware products and manage unapproved products in your organization.

Overview and benefits of a TRM

In your business enterprise, using an unapproved software can create a risk to the organization. The risks can include the following:

- Security risks: The software might be exposed to security issues.
- Delivery risks: There might not be sufficient knowledge on how to support the software.
- Legal risks: A business application might use the software in illegal ways.

You need to define the standards for the software that is to be used and the software versions that are permitted for use in your organization. Also, you need a way to explore when a non-permitted software is being used within the organization and in which business applications.

You can use the TRM module in the Enterprise Architecture Workspace to perform the following:

- View a list of all available TRM products. You can also view the list of TRM products grouped by product category.
- Request a TRM product
- Request a TRM product lifecycle
- Create a TRM product
- Create a TRM product lifecycle
- Approve or reject TRM product and product lifecycle requests.

Using the TRM module, you can manage the standards of the technology and set the right guardrail for technology usage. Setting the standards can improve the technical debt, security posture and save costs for the organization.

TRM Product Lifecycle

Each product in the TRM library is associated with a set of life-cycle phases with a start and end date. The life-cycle phases could be approved, unapproved, approved with constraints, Divest, and evaluation.

The TPM home page fetches all the business applications that are being used in your organization. It helps to review the status of the software that is being used. You can understand if any business application is using the software that is not part of the TRM or a software version that is not approved for production. For more information, see TRM lifecycle timelines on Gantt chart.

The TRM module uses a similar module to TPM to search in the TRM library. You can view the software that is part of the TRM library, and initiate a request to add the software or software version to the TRM library.

You can also use the TRM with the Software Asset Management (SAM) plugin. This plugin helps you to fetch or select the products and versions for the TRM library. You can also define your own

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software products when the Software Asset Management integration module isn't available for your instance.

Related topics

Approve or reject TRM requests

View all TRM products grouped by product category

You can view all your Technology Reference Model (TRM) products, grouped by category, in the Enterprise Architecture Workspace.

Before you begin

You can add or hide the displayed columns according to your requirement by selecting the personalize icon ( ) and then selecting **Edit columns**.

Role required: sn_apm.apm_user

Procedure

1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Technology Portfolio page by selecting the Technology Portfolio icon .
3. In the **TRM catalog** tab, select the expand row icon ( ) next to the TRM product category that you want to view the TRM products for.
   A list of TRM products is displayed.

View all TRM products

You can view all available Technology Reference Model (TRM) products in the Enterprise Architecture Workspace.

Before you begin

You can add or hide the displayed columns according to your requirement by selecting the **List Actions** icon ( ) and then selecting **Edit columns**.

Role required: sn_apm.apm_user

Procedure

1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Technology Portfolio page by selecting the Technology Portfolio icon .
3. In the **TRM catalog** tab, select *TRM* **product list** from the View list.
4. Select the expand row icon ( ) next to the TRM product next to a TRM product to view more details.

Request a TRM product

You can request a TRM product using the TRM catalog to add a new software or hardware to the TRM library.

Before you begin

Role required: sn_apm.apm_user

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Procedure

1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Technology Portfolio page by selecting the Technology Portfolio icon .
3. Select **Request TRM product**.
4. On the form, fill in the fields.
   For field information, see TRM Product Request form.
5. Select **Create**.

Request a TRM product lifecycle

You can add a new request to create a life cycle for a TRM product.

Before you begin

Role required: sn_apm.apm_user

Procedure

1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Technology Portfolio page by selecting the Technology Portfolio icon .
3. Select the TRM more actions icon next to **Request** *TRM* **product**.
4. Select **Request** *TRM* **product lifecycle**.
5. On the form, fill in the fields.
   For field information, see Create new TRM product lifecycle request form.
6. Select **Create**.

Add a TRM product in Enterprise Architecture Workspace

As an Enterprise Architect, you can add a new TRM product to the TRM library.

Before you begin

You must be part of the Enterprise Architect Group.

Role required: sn_apm.apm_analyst

Procedure

1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Technology Portfolio page by selecting the Technology Portfolio icon .
3. Select the TRM more actions icon next to **Request** *TRM* **product**.
4. Select **Create** *TRM* **Product**.
5. On the TRM Product Lifecycle form, fill in the fields.

   For field information, see New TRM product form.
6. Select **Create**.

Result

Lifecycle details are added for a TRM product.

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Related topics

Add a TRM product in Enterprise Architecture Workspace

Add a TRM product lifecycle

As an Enterprise Architect, you can add a new TRM product lifecycle.

Before you begin

You must be part of the Enterprise Architect Group.

Role required: sn_apm.apm_user

Procedure

1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Technology Portfolio page by selecting the Technology Portfolio icon .
3. Select the TRM more actions icon next to **Request** *TRM* **product**.
4. Select **Create** *TRM* **product lifecycle**.
5. On the TRM Product Lifecycle Request form, fill in the fields.

   For field information, see Create new TRM product lifecycle form.
6. Select **Create**.

Result

An email notification is sent to the approver for approval. The approver belongs to the Enterprise Architect group.

Related topics

Request a TRM product

Working with TRM lifecycle with wildcard

You can use Technology Reference Model (TRM) lifecycles with wildcards to update multiple TRM software product lifecycles simultaneously without having to specify the exact minor version details of individual TRM software products.

A TRM lifecycle with a wildcard is a TRM software product that has lifecycle version that ends with a '*'. The '*' means that exact specific version details aren't provided.

Use of TRM lifecycle with wildcard

The TRM lifecycle with wildcard helps you to automatically identify, categorize, and update TRM software products.

You can also create technical debts in bulk for multiple unapproved TRM software product versions, simultaneously.

Suppose you use Microsoft PowerPoint and have multiple versions like 1.1, 1.2, 1.3 installed for your organization. You create a TRM wildcard with the version ending 1.*. Now, you update some details of the TRM lifecycle with wildcard. When the *Populate TRM technical debts in the EA Workspace* job runs for the TRM wildcard, the updated data from the TRM lifecycle with wildcard is passed on to versions 1.1, 1.2, 1.3.

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Create a TRM lifecycle with wildcard

A TRM lifecycle with wildcard is created in a similar process as to how you would request a TRM product lifecycle. For information on how to add a TRM product lifecycle, see Add a TRM product lifecycle.

The only difference is, the TRM wildcard version ends with a '*'.

You must be a part of the enterprise architects group to be able to create a TRM wildcard.

Limitations of TRM lifecycle with wildcard

A TRM wildcard can't create technical debts when the full version of a particular TRM software product exists.

Related topics

- Manage TRM technical debt
- View TRM technical debts
- TRM Technical Debt calculation
- Run a scheduled job to update TRM technical debt data in EA Workspace

Manage TRM technical debt

Manage the TRM technical debts that are created for the products that aren't approved for the usage.

A scheduled job *Populate TRM technical debts in the EA Workspace* runs and creates an entry in the TRM Technical Debt [sn_apm_trm_standards_technical_debt] table for EA Workspace. The table shows a reference to the software in any business application that is not aligned with the TRM software phases. The table shows a reference to the software in any business application that either isn't defined in TRM or has TRM product lifecycles that restrict the usage of the software. To know how the technical debts are calculated, see Manage Technology Reference Model (TRM) technical debt.

Note:
The *Populate TRM technical debts in the EA Workspace* scheduled job is available only when the Software Asset Management (SAM) Foundation or Software Asset Management (SAM) Professional plugin is installed.

View TRM technical debts

You can view the Technology Reference Model (TRM) technical debts that are created for the products that aren't aligned with the TRM phases and standards.

Before you begin

Role required: sn_apm.apm_analyst

About this task

A scheduled job *Populate TRM technical debts in the EA Workspace* runs and creates an entry in the TRM Technical Debt [sn_apm_trm_standards_technical_debt] table for EA Workspace. The table shows a reference to the software in any business application that is not aligned with the TRM software phases. The table shows a reference to the software in any business application that either isn't defined in TRM or has TRM product lifecycles that restrict the usage of the software. To know how the technical debts are calculated, see Manage Technology Reference Model (TRM) technical debt.

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Note:
The *Populate TRM technical debts in the EA Workspace* scheduled job is available only when the Software Asset Management (SAM) Foundation or Software Asset Management (SAM) Professional plugin is installed.

Procedure

1. Navigate to **Workspaces** > *Enterprise Architecture Workspace*.
2. Open the Technology Portfolio page by selecting the Technology Portfolio icon .
3. Select **Technical Debt**.
4. View the TRM technical debts.
   For field information, see TRM technical debt form.

Result

Review the list of TRM products and associated business applications details. You can also view the reason for the technical debt.

Related topics

Managing the Technology Reference Model in Enterprise Architecture Workspace

View or update your TRM requests

TRM Technical Debt calculation

A TRM technical debt indicates the unapproved usage of a software. The technical debts table [sn_apm_trm_standards_technical_debt], displays the TRM products and associated business applications details, and the reason for the technical debt.

Technical debts are created at two levels if any of the following conditions are met. The Level 2 is checked only if the system property *sn_apm_trm.is_product_life_cycle_tech_debt_enabled* is set to True.

- Level 1
  - If a product is associated with a business application, but isn't part of the TRM product list. (OR)
  - If a product is associated with a business application and part of the TRM products list, but has the TRM phase's production unapproved.
- Level 2
  - If a product is associated with a business application, is part of the TRM products list, and has the TRM phase's production approved but doesn't have any associated TRM Product life cycles. (OR)
  - If a product is associated with a business application and part of the TRM products list, has the TRM phase with production approved, and the TRM product lifecycle exists, one of the following cases is considered:

    Case 1: If the lifecycle full version of the Application Service Software Model is not empty.

    A technical debt is created if the following condition isn't met for a TRM Product lifecycle:

    - TRM phase with production approved AND
    - TRM product's TRM phase with production approved AND
    - Version matching the lifecycle full version of the application service software model record AND
    - Phase start date <= Today's date <=phase end date.

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Case 2: If the life cycle full version of the Application Service Software Model is empty.

Technical debt is created if the following condition isn't met for a TRM Product Lifecycle:

- TRM phase with production approved AND
- TRM product's TRM phase with production approval AND
- Version is/starts with (based on version operator and isSampPluginInstalled) version of the associated software model AND
- The edition is/starts with (based on edition operator and isSampPluginInstalled) edition of associated software model AND
- Phase start date <= Today's date <=phase end date.

Run a scheduled job to update TRM technical debt data in EA Workspace

Run a scheduled job to fetch the TRM technical debts data. You must run this job to see the products that are not approved for usage in your enterprise according to the TRM phases defined in Enterprise Architecture Workspace > Setup>TRM Phases>All. You can schedule this job to periodically update the TRM technical debt for all business applications.

Before you begin
Role required: admin

About this task
You must run this job to see the products that are not approved for usage in your enterprise according to the TRM phases defined in Enterprise Architecture Workspace > Setup>TRM Phases>All. You can schedule this job to periodically update the TRM technical debt for all business applications.

Note:
The *Populate TRM technical debts in the EA Workspace* scheduled job will be available only when the Software Asset Management (SAM) Foundation or Software Asset Management (SAM) Professional plugin is installed.

Procedure
1. Navigate to **All** > **#System Definition** > **#Scheduled Jobs**.
2. Find and open the# scheduled job*Populate TRM technical debts in the EA Workspace*.
3. Select#**#Execute Now**.

Result
After executing the scheduled job, the Technical Debt [sn_apm_trm_standards_technical_debt] table gets updated with the latest technical debt data for your application portfolio. It updates the values in the table each time after you run the job.

Managing the Technology Portfolio Management (TPM) in Enterprise Architecture Workspace

Technology Portfolio Management helps Enterprise Architects to manage technology life-cycle risks and technology life-cycle exceptions. Enterprise Architects can evaluate all their business applications and application services by accessing the discovered technologies and auditing information in the Enterprise Architecture Workspace.

The underlying technologies of the business applications used in your business enterprise have a shelf life that must be actively managed and diligently monitored to track their versions and life-cycle.

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The software products used in your business applications can be operating systems, database management systems, development tools, and middle ware, each of which has a life cycle. If these life-cycle stages aren't tracked, there are risks where the vendor may not support them any longer and the business applications that run on these technologies are at stake.

Creating an inventory of all technologies used in the enterprise helps to:

- Track the versions of the software and manufacturer support dates for the software
- Set an internal life-cycle guidance for the software
- Assess the risks in using outdated software
- Plan to retire them just like the applications they support, at a definite date
- Support upgrade processes

The data for the software products are populated from the Computer (CMDB_CI_Computer) and all similar instances of the table, Docker Container (CMDB_CI_Docker_Container), and Serverless Hardwares (CMDB_CI_Serverless_Hardware) tables, by default. However, if you want to include other CMDB tables that contain software products, you must update the system property *sn_apm_tpm.configurationItemsWithSoftwareInstalls*. For information on how to update the system property, see Update the system property to gather software products from a CMDB table.

Installing the Technology Portfolio Management plugin

For instructions to install Technology Portfolio Management, see Activate the Technology Portfolio Management (TPM) plugin.

Important:
Technology Portfolio Management (TPM) fetches the hardware life-cycle data for your enterprise. To fetch the software life-cycle data, you must activate the Software Asset Management (SAM) Foundation or Software Asset Management (SAM) Professional plugin. Before installing the SAM Foundation plugin, carefully review the Software Asset Management Foundation plugin migration documentation.

TPM indicators in EA Workspace

The following are the indicators for Technology Portfolio Management (TPM) in EA Workspace:

Indicator	Description
Technology Lifecycle Risk [sn_apm_tpm_technology_risk]	Calculates the lifecycle risk score for business applications.

TPM reference model in EA Workspace

In EA Workspace, the Technology Portfolio Management enables you to align technologies using the **Update TPM data** action from a business application record or using the schedule job *Populate TPM Discovered Technologies and Lifecycles*.

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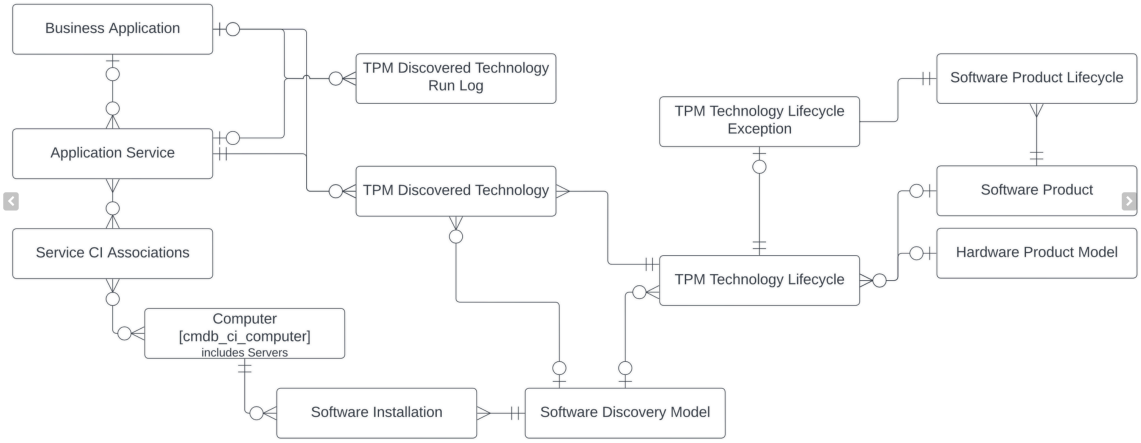
TPM Reference Model



Technology discovery process in EA Workspace

The following is the technology discovery and alignment process for business applications in the EA Workspace.

- Query and fetch the Consumes::Consumed by Application Services.

> **Note:**
> It must be an Application Service and these Application Services must be mapped. The Service Configuration Item Associations [svc_ci_assoc] table is populated for each Application Service and its Computers.

Service Configuration Item Associations

Service Configuration Item Associations | Configuration Item I | Search | Actions on selected rows... | New

All

Configuration Item Id	Ignore errors	Service Id
Search	Search	Search
*CAROL3-GATEWAY	false	service_1
*JON-IBM	false	Attendance Management Service-DEV
*JON-IBM	false	BuyIt - Call Centre
Apple - MacBook Pro 15" for Technical Staff	false	Attendance Management Service-QA
MacBook Air 13"	false	BuyIt - Stores
MacBook Air 13"	false	BuyIt - Call Centre
Asus G Series	false	Attendance Management Service
*JON-IBM	false	BuyIt - Internet Traffic

- For each computer identified in the Service Configuration Item Associations [svc_ci_assoc] table, you can see the installed software by selecting the Software Installations tab. Also, if a Hardware Model is associated with the computer, you can see the Hardware type details in the TPM Discovered Technologies tab.
- For each software install, you can see the associated discovery model. The software discovery models must be of a product type Licensable or Unknown and they must be normalized or manually normalized to get any appropriate information. You can also also use the *sn_apm_tpm.softwareDiscoveryModelProductFilterForTPMsystem* property to gather data on non-licensable software products. For information see, Filter software results using an encoded query in TPM.
- For each discovery model, create a TPM Discovered Technology record.
- When you create a record for the TPM Discovered Technology, it triggers the creation of an associated TPM Technology Lifecycles record and it fetches the lifecycle information for the hardware or software technology.

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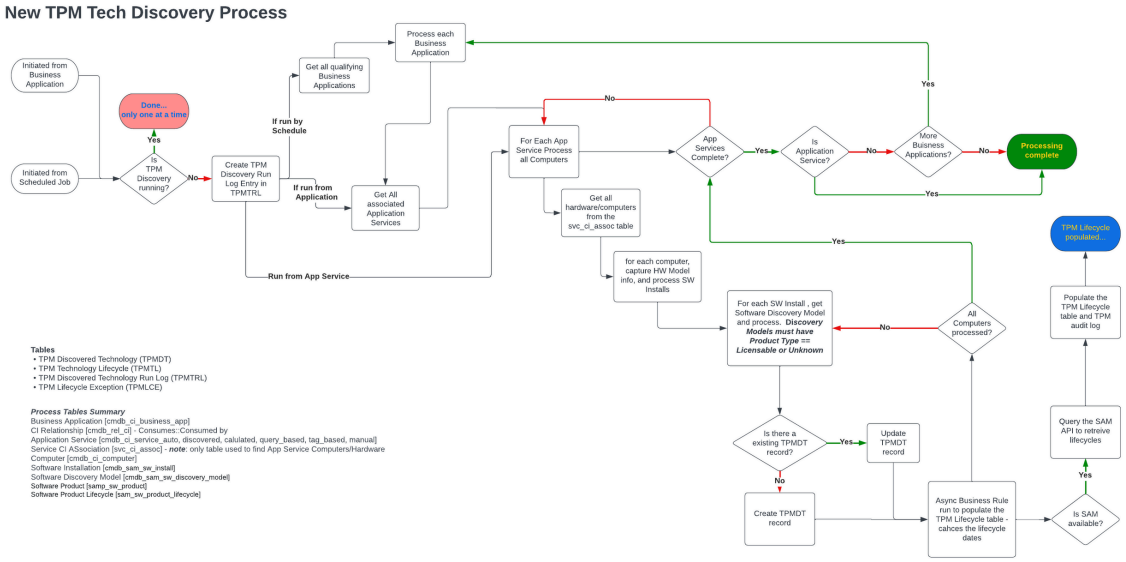
Technology life-cycle discovery process in EA Workspace



For successful software alignment records, you must have the following tables populated:

- Business Application [cmdb_ci_business_app]
- CI Relationship [cmdb_rel_ci] - Consumes::Consumed by
- Application Service [cmdb_ci_service_auto, discovered, calculated, query_based, tag_based, manual]
- Service CI Association [svc_ci_assoc] - note: Only table used to find App Service
- Computers/Hardware Computer [cmdb_ci_computer]
- Software Installation [cmdb_sam_sw_install]
- Software Discovery Model [cmdb_sam_sw_discovery_model]
- Software Product [samp_sw_product]
- Software Product Lifecycle [sam_sw_product_lifecycle]

> **Note:**
> Depending on your how you have setup your instance, other tables can also contain software records. Check with your administrator.

Hardware requires the Hardware Model reference on the Computer be populated.

Update TPM Data for a business application or application service

You can manually refresh the TPM life-cycle data manually for a selected business application or application service. A scheduled job **Populate TPM Discovered Technologies and Life-cycles** is also run on schedule or on-demand to update the life-cycle data for all business applications and application services. For more details, see Update TPM Data for a business application or application service and Run a scheduled job to generate TPM lifecycle data

View insights for technology life-cycle risks

You can track the technology lifecycle risk for business applications, application services, servers, software products, and hardware models. The **Populate TPM Discovered Technologies and Life-cycles** scheduled job shows the lifecycle results in the **Insights** section of the EA Workspace home page. Select the **Technology**

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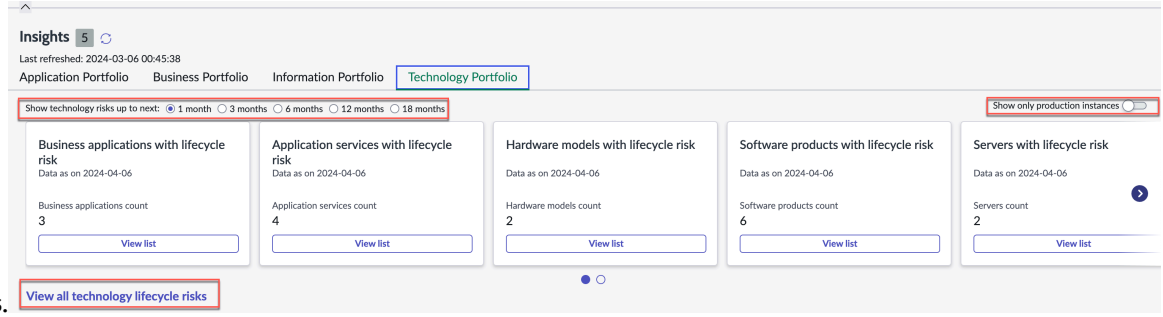
Portfolio tab in the **Insights** section and then select the **View all technology lifecycle risks**.



- Use this filter to see the risks for the next 1 month, 3 months, 6 months, 12 months, and 18 months. By default, the 1 month filter is applied.
- Use the **Show only production instances** toggle button to see only production instances that are having technology lifecycle risks. By default, this filter is off.
- Select the **View all technology lifecycle risks** link to see the list of all technology lifecycle risks sorted by earliest lifecycle date, which means the earliest date when a technology lifecycle risk is to happen. You can also export the Technology lifecycle risks information to Excel, CSV, JSON, or PDF as required.

  The data in the Technology lifecycle risks table is fetched from the TPM Discovered Technologies [sn_apm_tpm_discovered_technology] table.

- Execute the Populate Technology Lifecycle Risks scheduled job to generate the TPM technology lifecycle risks. This scheduled job populates the risk scores for business applications (BA), application services (AS), software products, and hardware models for a fiscal period of type month in the Technology lifecycle risks (sn_apm_tpm_technology_risk) table. For more details, see Schedule a job to generate TPM technology risk.

View TPM analysis run logs

You can track the progress of TPM analysis by examining the TPM Discovered Technology Run Logs [sn_apm_tpm_discovered_technology_run_log] table. Each time the analysis is run, an entry is added to this table. Navigate to *EA Workspace* > **Setup** > **Logs** section view the logs.

TPM lifecycle timelines on Gantt chart

For the Technology Portfolio Management (TPM), the business applications and their related application services (associated hardware models and software products) are displayed in a hierarchical structure. The corresponding timelines of the application services are displayed as bars on the Gantt chart.

The application services (composed of software products and hardware models) have lifecycle timelines determined for them. On the Gantt chart, the earliest TPM phase start date of either the software products or hardware models are rolled up to calculate the TPM phase start date of the overall application service. That is, the earliest TPM phase start date of any software product or hardware model is taken as the TPM phase start date of the application service, overall. For more details, see TPM lifecycle timelines on Gantt chart and View TPM and TRM lifecycle timelines on the Gantt chart.

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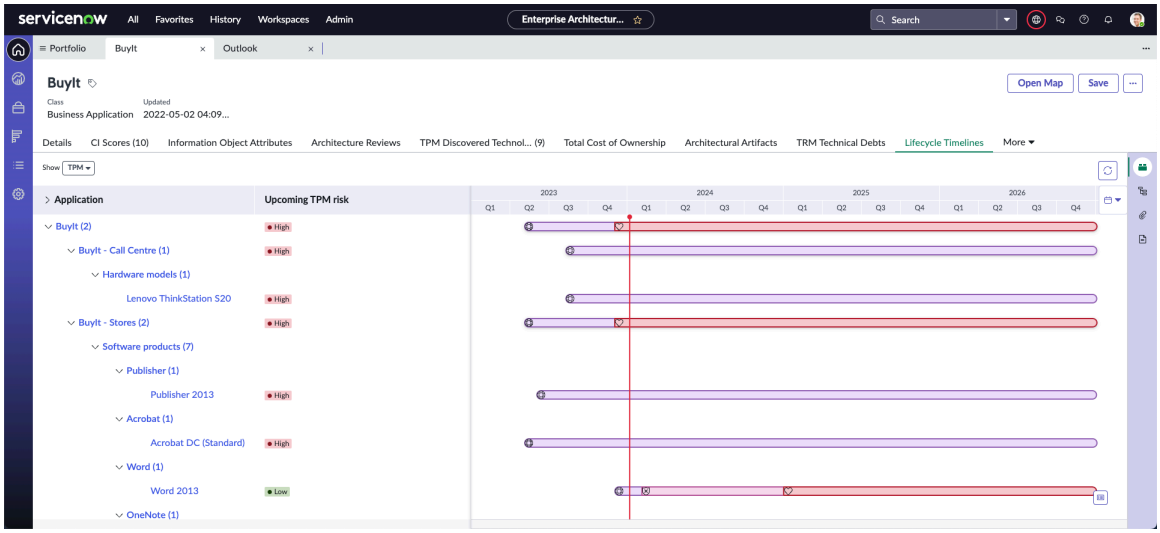

Data visualization for TPM data

In the Enterprise Architecture Workspace Dashboard, the 'Top 10 business applications with normalized TPM risk' widget shows the top 10 business applications having normalized TPM risk. For more details, see Working with the Enterprise Architecture Workspace dashboard.

Activate the Technology Portfolio Management (TPM) plugin

Activate the Technology Portfolio Management (TPM) store application that you purchased from the ServiceNow Store to make it available on your instance.

Before you begin

[store-future: BEGIN review]**Note:**
Starting from Enterprise Architecture Workspace version 3.0.3, you must activate the TPM plugin separately.
[End]

Role required: admin

Procedure

1. Navigate to **All** > **System Applications** > **All**.
2. Find the application using the filter criteria and search bar.

   You can search for the application by its name or ID. If you can't find an application, you may have to request it from the ServiceNow Store.

   Visit the ServiceNow Store website to view all the available apps and for information about submitting requests to the store.
3. Select a version from the list and select **Install**.
4. Select the **Load demo data** check box to install the demo data.
   Demo data comprises the sample records that describe application features for the common use cases. Load the demo data when you first activate the application on a development or test instance.
5. Select **Install**.

Tables installed with TPM in the EA Workspace

Several types of tables are installed with Technology Portfolio Management.

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The following tables are installed with the Technology Portfolio Management (TPM) plugin:

Table	Description
TPM Discovered Technology [sn_apm_tpm_discovered_technology]	Stores hardware and software elements in your enterprise. **Note:** To view the software life-cycle data, you must activate the Software Asset Management (SAM) Foundation or Software Asset Management (SAM) Professional plugin.
TPM Discovered Technology Run Log [sn_apm_tpm_discovered_technology_run_log]	Stores when Technology Portfolio Management (TPM) refreshed its contents against Software Asset Management (SAM) Professional and Hardware Asset Management (HAM) Professional.
TPM Technology Lifecycle [sn_apm_tpm_technology_lifecycle]	Stores the technology life cycles associated with the discovered technologies.
TPM Technology Lifecycle Exception [sn_apm_tpm_technology_lifecycle_exception]	Stores the life cycles that were approximated or couldn't be found from Software Asset Management (SAM) Professional or Hardware Asset Management (HAM) Professional.
TPM Technology Risk [sn_apm_tpm_technology_risk]	Stores the TPM technology risk information.

Business rules for TPM in EA Workspace

Several types of business rules are added with Technology Portfolio Management.

The following business rules are added for Technology Portfolio Management (TPM) in EA Workspace:

Business rule	Table	Description
Populate TPM Technology Lifecycle table	TPM Discovered Technology [sn_apm_tpm_discovered_technology]	Fetches the technology life-cycle data for your hardware and software elements in your enterprise.
Update Technology Lifecycle Info	TPM Discovered Technology [sn_apm_tpm_discovered_technology]	Updates technology life-cycle data for your hardware and software elements.
TPM Audit on TPM Lifecycle Exception	TPM Technology Lifecycle Exception [sn_apm_tpm_technology_lifecycle_exception]	Fetches the life cycles that were approximated or couldn't be found from Software Asset Management (SAM) Professional or Hardware Asset Management (HAM) Professional.

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Scheduled jobs for TPM in the EA Workspace

Several types of scheduled jobs are added for Technology Portfolio Management.

The following is the list of scheduled jobs for Technology Portfolio Management (TPM) in EA Workspace:

Scheduled job	Description
Populate TPM Technology Lifecycle Risks	Populates the TPM technology life-cycle risks data in the TPM Technology Life-cycle Risks [sn_apm_tpm_technology_risk] table.
Populate TPM Discovered Technologies and Lifecycles	Populates the technology life-cycle data in the TPM Technology Lifecycle [sn_apm_tpm_technology_lifecycle] table. The data includes end of support date, end of extended support date, and end of life date for your software products and hardware models. **Note:** The data for software products is displayed only when the Software Asset Management (SAM) Foundation or Software Asset Management (SAM) Professional plugin.
Populate TRM technical debts in the EA Workspace	Updates the Technical Debt [sn_apm_trm_standards_technical_debt] table with the latest technical debt data for your software products that is available in the TPM Discovered Technology [sn_apm_tpm_discovered_technology] table. **Note:** The Populate TRM technical debts in the EA Workspace scheduled job will be available only the Software Asset Management (SAM) Foundation or Software Asset Management (SAM) Professional plugin is installed.

Related topics

- Run a scheduled job to update TRM technical debt data in EA Workspace
- Schedule a job to generate TPM lifecycle data
- Schedule a job to generate TPM technology risk

Filter software results using an encoded query in TPM

Filter out unwanted software products and reduce the number of results to skip unwanted software and their lifecycles to be shown in the **Lifecycle Timeline** view of a business application. By default, the TPM picks licensable software. Use this encoded query when you want TPM to include other software (non-licensable) and filter the result.

Before you begin

Role required: admin

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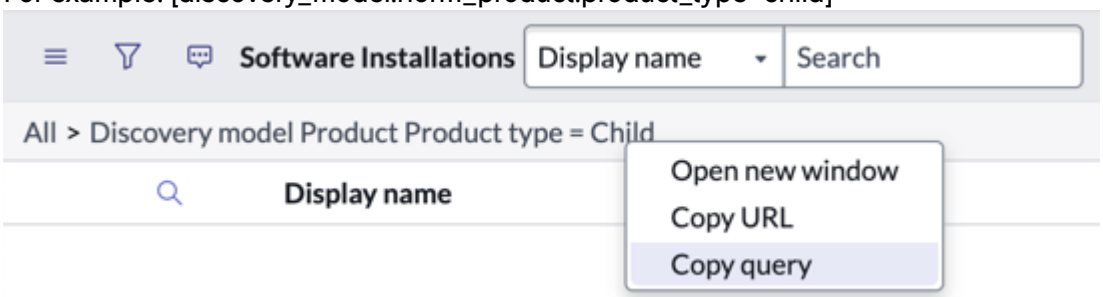
About this task

The TPM can track technology lifecycles for both licensable and non-licensable software. When you import non-licensable software, you may end up importing a large number of unnecessary software. You can restrict the number of results by specifying an encoded query as the value of the **sn_apm_tpm.softwareDiscoveryModelProductFilterForTPM** system property. When you set a value for this system property and run the TPM scheduled job, you can see the search results that satisfy your encoded query.

Procedure

1. Generate an encoded query string through a filter on the **Software Installations** page.
   a. Navigate to the **Software Installations** [cmdb_sam_sw_install] page.
   b. Apply a filter as per your requirement.
   c. Select **Run**.
   d. Right-click at the end of the filter breadcrumb and select **Copy query** from the context menu. For example: [discovery_model.norm_product.product_type=child]



2. Navigate to the System Property [sys_properties] table list view.
   a. Select **All**.
   b. In the navigation filter, enter `sys_properties.list` and press Enter.
3. Open the record for the **sn_apm_tpm.softwareDiscoveryModelProductFilterForTPM** system property.
4. Set the system property's value to an encoded query.
   For example: [discovery_model.norm_product.product_type=child]. If the system prompts you to change the application scope so that you can edit the record, select the provided link.
5. Select **Update**.
6. Run the scheduled job *`Populate TPM Discovered Technologies and Lifecycles`*.
   a. Navigate to **All** > **#System Definition** > **#Scheduled Jobs**.
   b. Find and open the# scheduled job*`Populate TPM Discovered Technologies and Lifecycles`*.
   c. Select#**#Execute Now**.

Result

The technologies and lifecycle values are updated in the TPM Discovered Technologies [sn_apm_tpm_discovered_technology_list] table.

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Update TPM Data for a business application or application service

Manually update the TPM lifecycle data including end of support date, end of extended support date, and end of life date for your software and hardware models for your business applications and application services.

Before you begin
Role required: admin

About this task
You can refresh the TPM lifecycle data manually for a selected business application or application service. A scheduled job *`Populate TPM Discovered Technologies and Lifecycles`* is also run on schedule or on-demand to update the lifecycle data for all business applications and application services.

Note:
The data for software products is displayed only when the Software Asset Management (SAM) Foundation or Software Asset Management (SAM) Professional plugin is installed.

Procedure

1. Navigate to **All** > **Application Portfolio Management** > **Enterprise Architecture Workspace** > **Workspace Home**.
2. Open the Portfolio List view by clicking the portfolio icon ( ).
3. Expand Technology Portfolio Management and select Overview.
4. Select the business application or application service link to open it.
5. Select the three-dot menu ( ) and select **Update TPM Data**.

Result
An on-demand job starts to update the TPM data.

Related topics

Schedule a job to generate TPM lifecycle data

Run a scheduled job to generate TPM lifecycle data

Restart Populate TPM Discovered Technologies and Lifecycles scheduled job

You can restart the *`TPM Discovered Technologies and Lifecycles`* job if it encounters any interruptions or failures.

Before you begin
Role required: admin

About this task
The restart feature enables you to resume the *`TPM Discovered Technologies and Lifecycles`* job from where it stopped. This ensures that the data population process is completed without having to start the job from the beginning.

The **Restart** button becomes active on the **TPM Discovered Technology Run Log** page after one hour from the time since when there's no update to the run log. You can determine whether the job faced any interruption or whether it failed by analyzing the **Records Processed** field value and if there's no update to the count of TPM discovered technologies in the system.

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Procedure

1. Navigate to **Workspaces** > *Enterprise Architecture Workspace*.
2. Open the Setup page by selecting the Setup icon .
3. Select the expand row icon ( ) next to **Logs**.
4. Select the relevant TPM log that you want to restart the *TPM Discovered Technologies and Lifecycles* job for.
5. Select **Restart**.

Related topics

Managing the Technology Portfolio Management (TPM) in Enterprise Architecture Workspace

Update TPM Data for a business application or application service

View TPM logs

View technology lifecycle details

You can view the Technology Portfolio Management (TPM) lifecycle timelines in Enterprise Architecture Workspace, to track the different phases of a product's lifecycle, such as end of support, end of extended support, and end of life.

Before you begin

The lifecycle data for software products is displayed only when the Software Asset Management Foundation plugin or Software Asset Management Professional plugin is installed.

Role required: sn_apm.apm_user

About this task

The TPM lifecycle data enables you to manage your technology portfolio effectively, ensuring your business applications and their related application services are updated or replaced timely.

Note:
For each TPM lifecycle phase, the end date of one phase is the start date of the next phase. For information on lifecycle end-date calculation logic, see View TPM and TRM lifecycle timelines on the Gantt chart.

Procedure

1. Navigate to **Workspaces** > *Enterprise Architecture Workspace*.
2. Open the Technology Portfolio page by selecting the Technology Portfolio icon .
3. Select **TPM lifecycles**.

View TPM risk details

View all the Technology Portfolio Management (TPM) risk data for software products that are facing high and moderate technology risks.

Before you begin

Role required: sn_apm.apm_user

Procedure

1. Navigate to **Workspaces** > *Enterprise Architecture Workspace*.
2. Open the Technology Portfolio page by selecting the Technology Portfolio icon .

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3. Select **TPM risk**.

   To update the TPM risk scores, you must run the *Populate Technology Lifecycles Risks* job. For more details, see Schedule a job to generate TPM technology risk.

Related topics

Normalization of application scores

Normalized value and application score for an assessment

Update the system property to gather software products from a CMDB table

You can optionally customize the default values of the *sn_apm_tpm.configurationItemsWithSoftwareInstalls* system property, to capture the details of Technology Portfolio Management (TPM) software products that aren't stored in the default CMDB tables, Computer (CMDB_CI_Computer) and all similar instances of the table, Docker Container (CMDB_CI_Docker_Container), and Serverless Hardwares (CMDB_CI_Serverless_Hardware).

Before you begin

This feature is available from Technology Portfolio Management plugin (sn_apm_tpm) version 1.6.0.

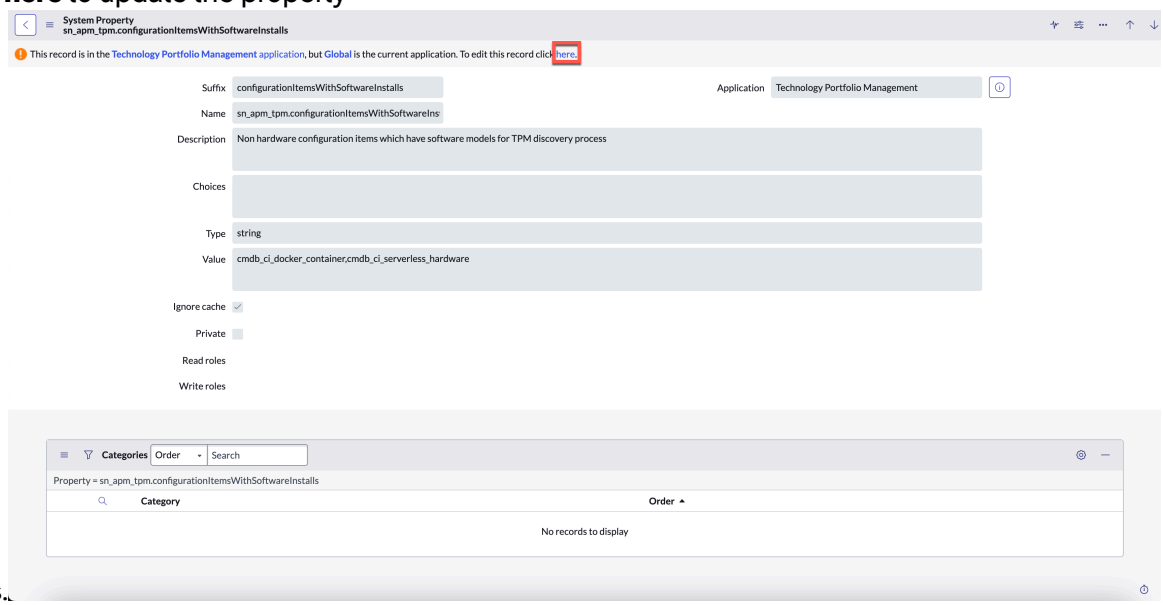
Role required: admin

About this task

You can include other CMDB tables that contain software products, to fetch and view TPM software products data from those tables.

Procedure

1. Select **All** and in the navigation filter enter *sys_properties.list*.
2. Navigate to the *sn_apm_tpm.configurationItemsWithSoftwareInstalls* system property.
3. Select **here** to update the property details.



4. In the **Value** field, add the CMDB table name that contains the details of the TPM software products, in comma-delimited format.

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5. Select **Update**.
   After the *Populate TPM Discovered Technologies and Lifecycles* job runs, the corresponding software records and their technology lifecycle details are populated in the list of TPM software products.

Related topics

Managing the Technology Portfolio Management (TPM) in Enterprise Architecture Workspace

Run a scheduled job to generate TPM lifecycle data

Schedule a job to generate TPM lifecycle data

Working with technology portfolio audit details

The#**Technology portfolio audit** tab shows audit information for your applications. An entry in this table indicates that at least one lifecycle for that software product or hardware model was either approximated, or not found, or doesn't exist.

The data in the **Technology portfolio audit** table is fetched from the TPM Technology Lifecycle Exception [sn_apm_tpm_technology_lifecycle_exception] table.

As an admin user, you can run the *Populate TPM Discovered Technologies and Lifecycles* scheduled job on-demand to calculate the technology lifecycle risk for your application portfolio. The scheduled job executes the script generating the lifecycle risk dates including end of support date, end of extended support date, and end of life date for your software products and hardware models by querying the ITAM content library.

For more details, see Schedule a job to generate TPM lifecycle data and Run a scheduled job to generate TPM lifecycle data.

Whether the script runs on demand or scheduled, you can view the results in the **Enterprise Architecture Workspace** > **Setup** > **Logs**.

Example: Benefits of running a technology portfolio audit

If the software product full version is 9.2.1, it may be that the **End of Support** lifecycle version in the Software Asset Management content library was only full version 9.2. This audit table helps you to evaluate the lifecycle matching information based on the details of the products being used in your organization. The table helps you to identify whenever an exact lifecycle version match or no valid lifecycle version could be found against the software product or hardware model version used in your organization.

Related topics

Technology portfolio audit form

View technology portfolio audit risk details

You can view all your technology portfolio details in the Enterprise Architecture Workspace.

Before you begin

Role required: admin

Procedure

1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Technology Portfolio page by selecting the Technology Portfolio icon .
3. Select **Technology portfolio audit**.
   For a description of field values, see Technology portfolio audit form.

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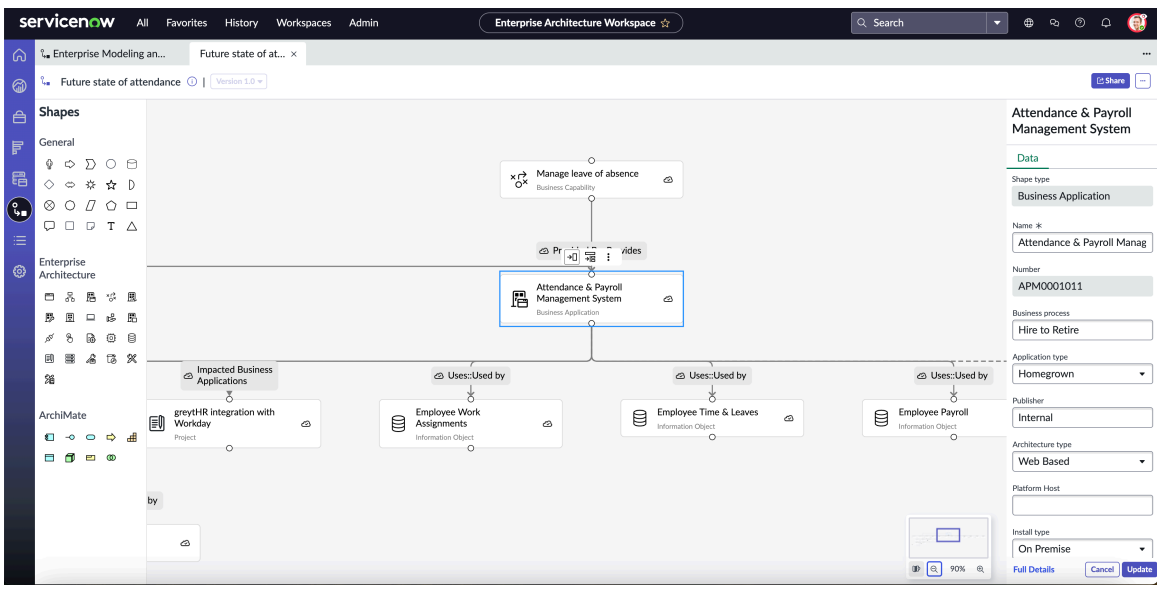
Enterprise Modeling and Visualization in the EA Workspace

The Enterprise Modeling and Visualization functionality in EA Workspace helps you with diagramming and modeling capabilities, and enable you to model the future state of your IT and its relationship to the business landscape.

You can use the Enterprise Modeling and Visualization [com.snc.apm_modelling_tool] functionality in EA Workspace to create diagrams for your applications hierarchy and associate them with architectural artifacts. These diagrams enable decision makers to make informed decisions.

Creating diagrams for your applications hierarchy helps you in the following:

- Visual representation: The diagrams and models provide a visual representation of complex enterprise structures, processes, and relationships. This visual representation helps your stakeholders, including executives and IT to understand the complexities of the organization.
- Effective communication: Diagrams serve as a common language that bridges the gap between technical and non-technical stakeholders. They enable effective communication and collaboration between different teams and departments within an organization.
- Improved decision making: The diagramming and modeling capabilities enable decision makers to make informed decisions. They can assess the impact of proposed changes, evaluate different scenarios, and identify potential risks before implementing strategies or projects.
- Alignment with business goals: Diagrams and models help you align your IT initiatives with overall business goals. They provide a holistic view of the business and confirm that IT 's investments are strategically aligned with business goals.
- Change management: The modeling capabilities facilitate change management by illustrating how changes impact the entire enterprise. This helps plan and execute transformations that run smoothly and with minimal disruption.
- Regulatory and governance compliance: Many regulatory agencies and standards organizations require documentation and adherence to architectural guidelines. Modeling helps you verify compliance and governance by providing a structured framework for managing architectural artifacts.
- Efficiency and cost reduction: By identifying redundancies, optimizing processes, and streamlining operations, modeling and diagramming can lead to cost reductions and improvements in operational efficiency.



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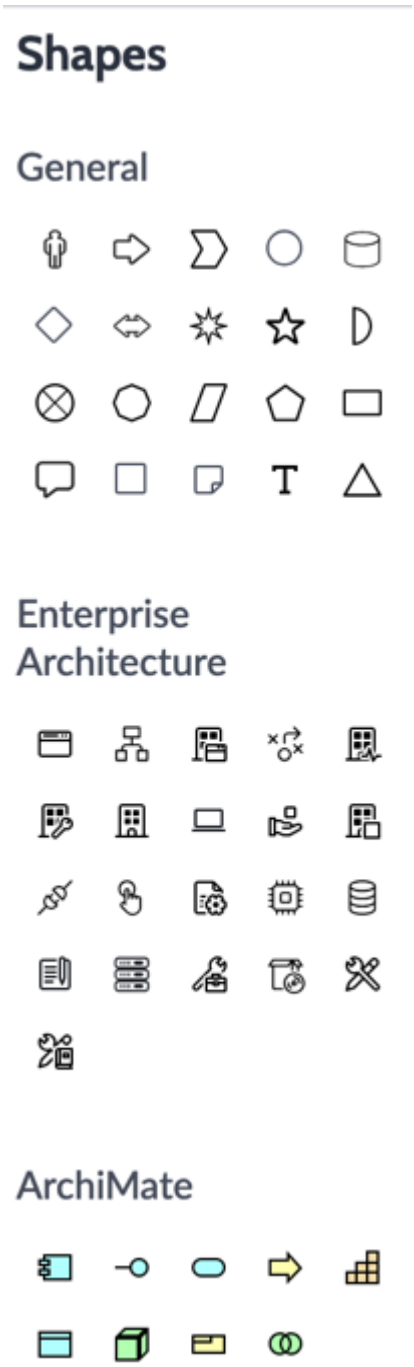
Installing the Enterprise Modeling and Visualization application

You can activate the Enterprise Modeling and Visualization [com.snc.apm_modelling_tool] from the ServiceNow Store.

Working with diagrams

- **Shapes**: This section enables you to use different kinds of shapes to create a diagram. Available shapes are:
  - General shapes
  - Enterprise Architecture shapes
  - ArchiMate® shapes (ArchiMate is a registered trademark of The Open Group)



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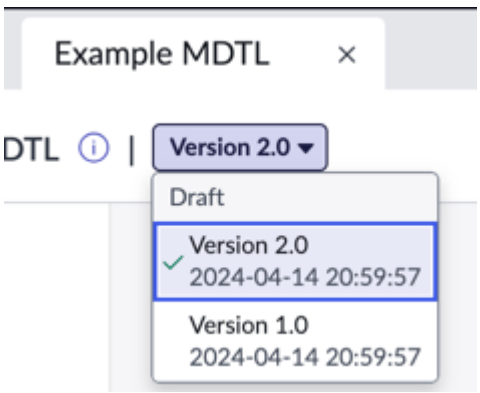
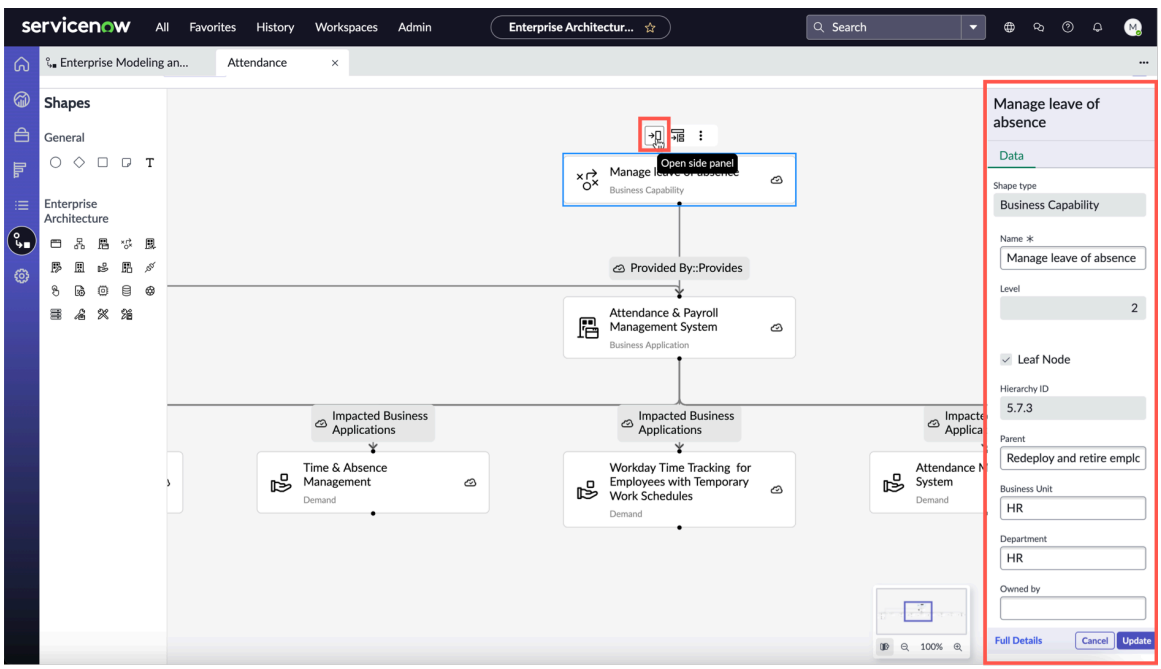
- **Version**: This field enables you to view and open a different version of the diagram.



- **Share**: Use this option to share the diagram with your peers.
- **Commit changes**: Use this option to synchronize the diagram to the repository. This option is available only when the diagram is approved.
- **Save as new version**: Use this option to create a new version of the diagram within the same artifact.
- **Duplicate**: Use this option to duplicate an existing diagram and save it as a new artifact.

- **Open side panel**: Select a shape in the diagram to see this option. Use this option to open the selected object details in a side panel. If the shape is connected to an existing ServiceNow element, the details are fetched from the database and shown in the side panel. Update the details as required. You can select the Full details link to open the full form.



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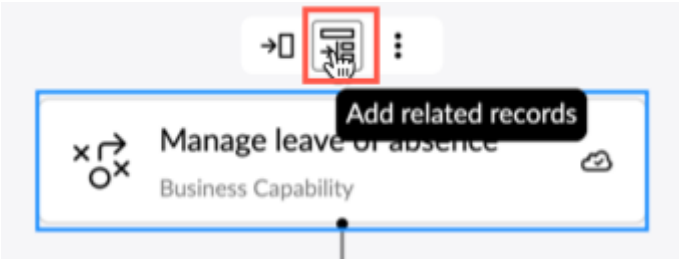
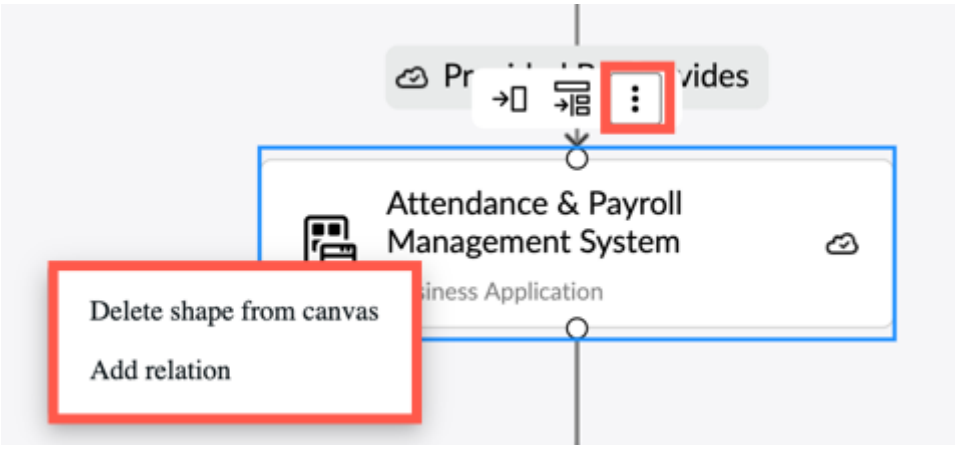
- **Add related records**- Select a shape in the diagram to see this option. Use this option to fetch and add the objects and their relationships with reference to the selected object.



- **More actions**- Select the three dots menu to see the following options:



  - **Delete shape from canvas** to remove the selected shape from the canvas.
  - **Add relation** to add relationships with reference to the selected object.

Shapes to create a modeling diagram

The shapes available in the Enterprise Modeling and Visualization helps you create diagrams.

Available shapes to create a diagram

Shapes are icon representations in the Enterprise Modeling and Visualization. You can use these shapes to create diagrams for your business capability and applications hierarchy.

Following are the different types of shapes available to create diagrams:

- General shapes
- Enterprise Architecture shapes
- ArchiMate® shapes (ArchiMate is a registered trademark of The Open Group)

Note:
You must activate the following plugins to view the respective shapes:

- SAM Foundation plugin to view the Software product shape
- Digital Integration plugin to view the Digital Integration and Digital Interface shapes
- PPM Standard plugin to view the Project shape
- CMDB CI Class Models (app-cmdb-content) plugins to view the SDLC component shape

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General shapes

Shape	Name
	Actor
	Arrow
	Chevron
	Circle
	Cylinder
	Diamond
	Double ended arrow
	Eight pointed star
	Five pointed star
	Half eclipse
	Junction
	Octagon
	Parallelogram
	Pentagon
	Rectangle
	Speech bubble
	Square
	Sticky note
	Text box
	Triangle

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Enterprise Architecture shapes

Shape	Name
	Application
	Application Service
	Business Application
	Business Capability
	Business Process
	Business Service
	Business Unit
	Computer
	Demand
	Departments
	Digital Integration
	Digital Interface
	Dynamic CI Group
	Hardware Model
	Information Object
	SDLC Component
	Server
	Service Portfolio
	Software Product
	Technical Service
	Technical Service Offering

ArchiMate shapes

Shape	Name
	Application component
	Application interface
	Application service

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ArchiMate shapes (continued)

Shape	Name
	Business process
	Capability
	Data object
	Node
	Product
	Technology collaboration

Create a diagram for a business capability map

Create and model your business capability map using the Enterprise Modeling and Visualization.

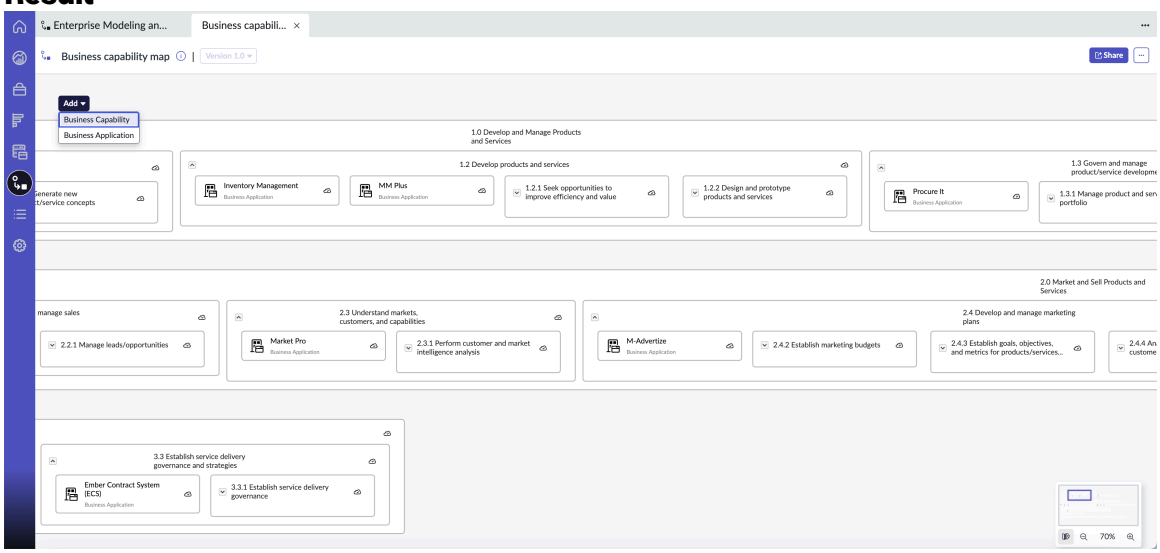
Before you begin

Role required: sn_apm.apm_user

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Modeling page by selecting the Enterprise Modeling and Visualization icon ( ).
3. Select the **New** drop-down menu.
4. Select **Business capability map**.
5. On the Create a business capability map form, fill in the details.
   For field information, see Create a business capability map form.
6. Select **Create diagram**.

Result



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The capability diagram gets created and opened in a new tab. You can add new capabilities and business applications to the map and edit it as required. The artifact gets added to the Architectural Artifacts related list for the capability.

Related topics

Update a business capability map

Update a business capability map

Modify an existing business capability map by adding new capabilities, business applications, or changing the hierarchy of the existing capabilities.

Before you begin

Role required: sn_apm.apm_user

Note:
You must have the Owner or Editor access to the artifact or diagram.

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Modeling page by selecting the Enterprise Modeling and Visualization icon ( ).
3. Open an existing capability map artifact from the **Diagrams** page.
   By default, two levels of hierarchy are displayed. Use the down arrow in a capability box to expand and see the next level capabilities.
4. Update the map as required.
   - Move the capabilities from one capability to another capability. Use the **Update hierarchies** button on the Business Portfolio page to refresh the IDs of all the capabilities according to the changes in the committed diagram.
   - To add a new business capability or a business application to the hierarchy map, select the **Add** drop-down menu and then select **Business Capability** or **Business Application**. Drag on the new capability or business application on to a business capability to add the relationship.
   - To apply a color to a capability, select the capability box and select the color that you want to apply from the color pallet.

   All the updates are auto-saved.
5. Select **Commit changes** to synchronize the diagram to the database.
   This option is available only when the diagram is approved. For more information, see Synchronize a shape to the database.
6. Select **Share** to share the diagram with individuals or groups.
   For more information, see Share a modeling diagram.
7. Select the More Actions menu ( ) to perform the following actions:
   - **Save as new version**: Select this option to create a version for the selected diagram. The version number is automatically added in the Version number field, and it isn't editable. For more information, see Save as a new version.
   - **Duplicate**: Select this option to duplicate the diagram. For more information, see Duplicate a modeling diagram.

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- **Submit for approval**: Select this option to submit the diagram for approval. The approval process can be done through a configured workflow. By default, the approval request is submitted to the Enterprise Architect group. For more information, see Submit a modeling diagram for approval.

Related topics

Create a diagram for a business capability map

Add a business capability or business application to the capability map

Create diagram for a business hierarchy map

Update a business application hierarchy map

Add a business capability or business application to the capability map

Add a new or existing business capability or business application to the capability map using the Enterprise Modeling and Visualization.

Before you begin

Role required: sn_apm.apm_user

Note:
You must have the Owner or Editor access to the artifact or diagram.

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Modeling page by selecting the Modeling icon ( ).
3. Create a new diagram or select an existing diagram from the Diagrams page.
   By default, two levels of capability hierarchy are displayed. Use the down arrow in a capability box to expand and see the next level capabilities and associated business applications.
4. Select the **Add** drop-down menu and then select **Business Capability** or **Business Application**.

   A new business capability or business application shape gets added to the canvas.
5. Select the newly added shape and select the Open the side panel icon ( ) to open the side panel in the canvas.
6. Select and map an existing business capability or business application or create a new one.
   - To map an existing CI, select the **Choose Existing** button and select a CI from the drop-down list.

     Note:
     For capabilities, only level 0 capabilities are displayed in the list. Capabilities that are already available in the map aren't displayed in the list to select.

   - To create a CI, select the **Create New** button and enter the details.
7. Drag the configuration item (CI) to capability to create a relationship.
   The border of the configuration item (CI) box changes to dotted lines. After you commit the diagram successfully, the border line of the box changes to a solid line.

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8. Apply colors to the capabilities as required.
9. Send the diagram for approval.
   After receiving the approval, you can see the **Commit changes** button. Use the **Commit changes** button to synchronize the diagram to the database.
10. Select **Commit changes** to synchronize the diagram to the database.
    This option is available only when the diagram is approved. For more information, see Synchronize a shape to the database.
11. Select **Share** to share the diagram with individuals or groups.
    For more information, see Share a modeling diagram.
12. Select the More Actions menu ( ) to perform the following actions:
    - **Save as new version**: Select this option to create a version for the selected diagram. The version number is automatically added in the Version number field, and it isn't editable.
    - **Duplicate**: Select this option to duplicate the diagram.
    - **Submit for approval**: Select this option to submit the diagram for approval. The approval process can be done through a configured workflow. By default, the approval request is submitted to the Enterprise Architect group.

Related topics

Create a diagram for a business capability map

Update a business capability map

Create diagram for a business hierarchy map

Create and model your business application hierarchy map using the Enterprise Modeling and Visualization.

Before you begin

Role required: sn_apm.apm_user

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Modeling page by selecting the Enterprise Modeling and Visualization icon ( ).
3. Select **New** drop-down menu.
4. Select **Business hierarchy map**.
5. On the Create a business capability map form, fill in the details.
   For field information, see Create a business hierarchy map form.
6. Select **Create diagram**.

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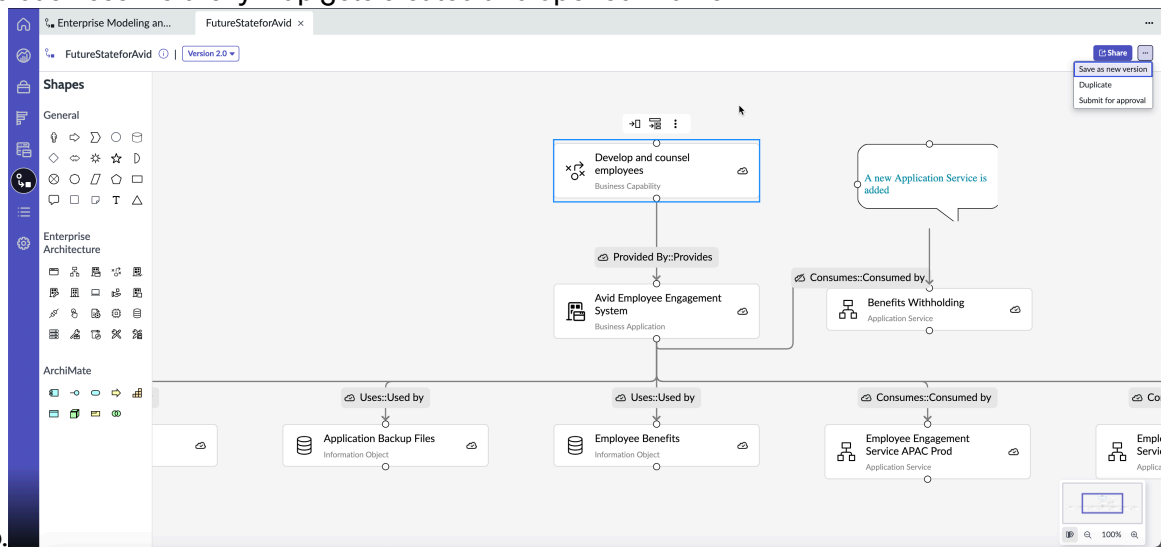
Result

The business hierarchy map gets created and opened in a new tab.



Related topics

- Update a business application hierarchy map
- Create a diagram for a business capability map

Update a business application hierarchy map

Modify an existing business application hierarchy map by adding or removing shapes and relationships.

Before you begin

Role required: sn_apm.apm_user

Note:
You must have the Owner or Editor access to the artifact or diagram.

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Modeling page by selecting the Enterprise Modeling and Visualization icon ( ).
3. Open an existing business hierarchy map artifact from the **Diagrams** page.
4. Select the newly added shape and select the Open the side panel icon ( ) to open the details panel for the selected shape in the canvas.
5. Select a shape in the diagram to see the following options:
   - Side panel icon ( ) to update the details of a record.
   - Add related records icon ( ) to add entities and relationship.
   - More Actions context menu ( ) to see options for adding relationship or deleting a shape from the canvas.
6. Select **Commit changes** to synchronize the diagram to the database.
   This option is available only when the diagram is approved. For more information, see Synchronize a shape to the database.
7. Select **Share** to share the diagram with individuals or groups.

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For more information, see Share a modeling diagram.

8. Select the More Actions menu ( ) to perform the following actions:
   - **Save as new version**: Select this option to create a version for the selected diagram. The version number is automatically added in the Version number field, and it isn't editable. For more information, see Save as a new version.
   - **Duplicate**: Select this option to duplicate the diagram. For more information, see Duplicate a modeling diagram.
   - **Submit for approval**: Select this option to submit the diagram for approval. The approval process can be done through a configured workflow. By default, the approval request is submitted to the Enterprise Architect group. For more information, see Submit a modeling diagram for approval.

Related topics

Create a diagram for a business capability map

Update a business capability map

Add a business capability or business application to the capability map

Create diagram for a business hierarchy map

Add related records in the modeling diagram

Fetch and add a related record to the selected object in the diagram.

Before you begin
Role required: sn_apm.apm_user

Note:
You must have the Owner or Editor access to the artifact or diagram.

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Modeling page by selecting the Modeling icon ( ).
3. Select an existing diagram from the Diagrams page.
4. Select a CI in the diagram and then open the context menu and the More Actions menu ( ).
5. Open the Add related records window by selecting the icon.
6. Select the entities that you want to add to the diagram.
7. Select **Add**.

Result
The selected entities are added to the diagram for the object.

Related topics

Share a modeling diagram

Commit diagram changes

Save as a new version

Duplicate a modeling diagram

Submit a modeling diagram for approval

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Synchronize a shape to the database

Delete a shape

ArchiMate shapes support in the Enterprise Modeling and Visualization

ArchiMate® shapes are the industry standard shapes used by the Enterprise Architects to create diagrams with relationships among with different domains in the enterprise. ArchiMate is a registered trademark of The Open Group. Enterprise Modeling and Visualization supports ArchiMate shapes along with General and Enterprise Architecture shapes.

ArchiMate shapes mapping with ServiceNow Common Service Data Model (CSDM)

ArchiMate shapes are internally associated with the ServiceNow CSDM elements. This mapping allows you to follow similar mapping of the Enterprise Architecture shapes relationships.

ArchiMate shape	CSDM element type
Business Service	Business Service
Application Service	Application Service
Application Component	Business Application
Product	Business Application
Artifact	Architectural Artifact
Capability	Business Capability
Business Process	Business Process
Technology Collaboration	Dynamic CI Group
Node	Server
Data Object	Information Object
Contract	Contract
Location	Location
Application Interface	Digital Interface

Types of ArchiMate relationships

Following are the relationship types for the ArchiMate shapes. Use these arrows to define the relationship between the ArchiMate shapes in a modeling diagram.

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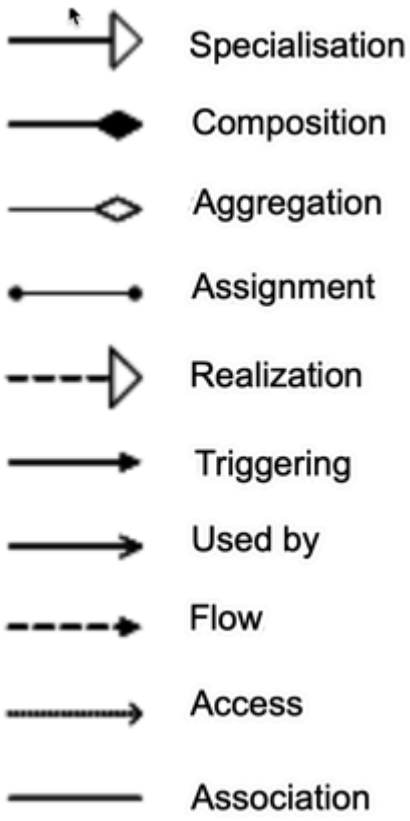

Create diagram using ArchiMate shapes and add relationships

Use the industry standard ArchiMate shapes to create modeling diagrams for your enterprise in the Enterprise Architecture Workspace.

Before you begin

Role required: sn_apm.apm_user

About this task

You can create a diagram with the combination of CSDM and ArchiMate shapes or you can use only the ArchiMate shapes. If you want to create the diagram with only ArchiMate shapes, you can skip including the name of the Business Application in the Create a business hierarchy map form. It creates a blank canvas.

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Modeling page by selecting the Enterprise Modeling and Visualization icon ( ).
3. Select **New** drop-down menu.
4. Select **Business hierarchy map**.
5. On the Create a business capability map form, fill in the details.
   For field information, see Create a business hierarchy map form.
6. Select **Create diagram**.
   A blank canvas gets created for the artifact.
7. Add ArchiMate shapes to the canvas.
8. Associate a CI to the shape by selecting a radio button.

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- **Choose existing**- Select this radio button to associate the shape with an existing CI.
- **Create new**- Select this radio button to create a new CI for the selected shape.

9. Select a connector line to update the relationship type.
   The Relationship side panel opens. Select a **Value** and **ArchiMate relationship type**. For more information on the ArchiMate shapes and relationships, see ArchiMate shapes support in the Enterprise Modeling and Visualization.
10. Select a shape and add related records for the shape by selecting the icon.
    Th Add related records window opens. It lists the Entities with the number and Relationship type (CI relationship or a Reference).
11. Select the **Entities** that you want to include and then select **Add**.
    The selected entities are added to the diagram with the relationship showing in ArchiMate format. In the diagram, the dotted lines represent the Reference links and the solid lines represent the CI relationships.
12. Select **Commit changes** to synchronize the diagram to the database.
    This option is available only when the diagram is approved. For more information, see Synchronize a shape to the database.
13. Select **Share** to share the diagram with individuals or groups.
    For more information, see Share a modeling diagram.
14. Select the More Actions menu ( ) to perform the following actions:
    - **Save as new version**: Select this option to create a version for the selected diagram. The version number is automatically added in the Version number field, and it isn't editable. For more information, see Save as a new version.
    - **Duplicate**: Select this option to duplicate the diagram. For more information, see Duplicate a modeling diagram.
    - **Submit for approval**: Select this option to submit the diagram for approval. The approval process can be done through a configured workflow. By default, the approval request is submitted to the Enterprise Architect group. For more information, see Submit a modeling diagram for approval.

Share a modeling diagram

Share your draft diagrams with individuals and groups and define access levels for them to view and modify the diagram.

Before you begin

Role required: sn_apm.apm_user

Note:
You must have the Owner or Editor access to the artifact or diagram.

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Modeling page by selecting the Modeling icon ( ).
3. Select an existing diagram that you created and you want to share with others.
4. Select **Share**.
5. Add member and groups with whom you want to share the diagram.
   You can provide the following access levels to the members and groups:

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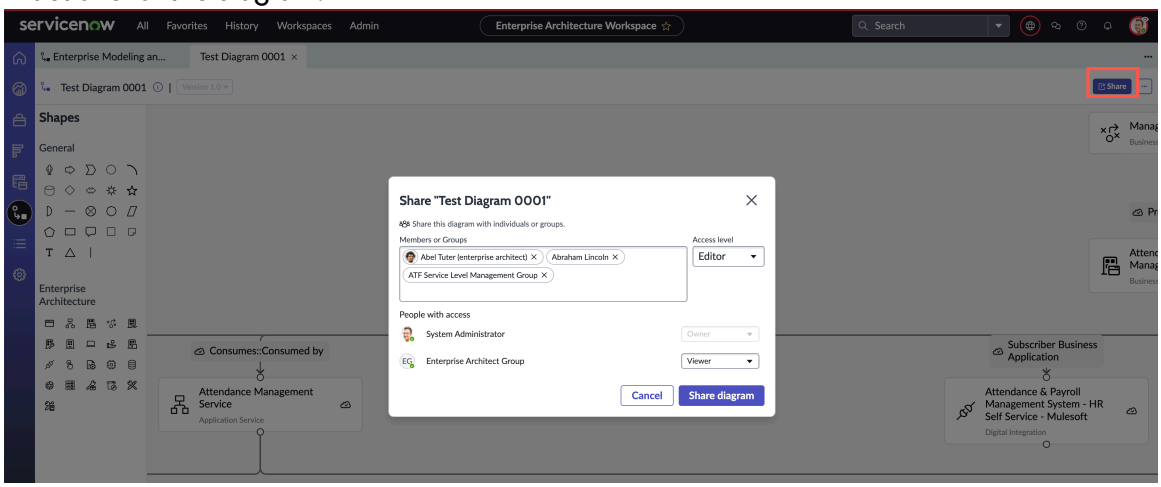
- **Owner**: With this access, you can edit the diagram, share the diagram, and modify access levels for other users (except for the actual owner of the diagram).
- **Editor**: With this access, you can edit the diagram, share the diagram with Editor or Viewer access for other users, and modify access levels for the users added by you.
- **Viewer**: With this access, you can only view the diagram, and can't perform any other actions for the diagram.



Related topics

- Commit diagram changes
- Save as a new version
- Duplicate a modeling diagram
- Submit a modeling diagram for approval
- Synchronize a shape to the database
- Add related records in the modeling diagram
- Delete a shape

Commit diagram changes

Synchronize an approved diagram and all its elements to the database.

Before you begin

Role required: sn_apm.apm_analyst

Note:
You must have the Owner or Editor access to the artifact or diagram.

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Modeling page by selecting the Modeling icon ( ).
3. Select an existing diagram from the Diagrams page.
4. Select **Commit changes**.
5. Synchronize the diagram by selecting **Commit**.

Result

The diagram is synced to the ServiceNow database.

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Related topics

- Share a modeling diagram
- Save as a new version
- Duplicate a modeling diagram
- Synchronize a shape to the database
- Add related records in the modeling diagram
- Delete a shape

Save as a new version

Copy an existing diagram and create a version for it within the selected architectural artifact. You can update the new version as required.

Before you begin
Role required: sn_apm.apm_user

Note:
You must have the Owner or Editor access to the artifact or diagram.

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Modeling page by selecting the Modeling icon ( ).
3. Select an existing diagram from the Diagrams page.
4. Select the More actions menu .
5. Select **Save as new version**.
   In the Save as new version window, the Version number field is automatically updated with a number for the diagram. This field is a non-editable field.
6. Select **Save**.

Result
This action saves the diagram as a new version within the existing architectural artifact. The Version drop-down shows the newly created version.

Related topics

- Share a modeling diagram
- Duplicate a modeling diagram
- Save as a new version
- Add related records in the modeling diagram
- Delete a shape

Duplicate a modeling diagram

Make a copy of an existing diagram that you created and change according to your requirement.

Before you begin
Role required: sn_apm.apm_user

Note:
You must have the Owner or Editor access to the artifact or diagram.

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Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Modeling page by selecting the Modeling icon ( ).
3. Select an existing diagram from the Diagrams page.
4. Select the More actions menu .
5. Select **Duplicate**.
6. Enter a name for the diagram.
7. Select **Save**.

Related topics

- Share a modeling diagram
- Commit diagram changes
- Save as a new version
- Submit a modeling diagram for approval
- Synchronize a shape to the database
- Add related records in the modeling diagram
- Delete a shape

Submit a modeling diagram for approval

Send your draft modeling diagrams for approval. After receiving the approval, you can commit the diagram to the database. The approval process can be done through a configured workflow. By default, the approval request is submitted to the Enterprise Architect group.

Before you begin

Role required: sn_apm.apm_user

Note:
You must have the Owner or Editor access to the artifact or diagram.

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Modeling page by selecting the Modeling icon ( ).
3. Select an existing diagram from the Diagrams page.
4. Select the More actions menu .
5. Select **Submit for approval**.
6. Select **Submit**.

After the diagram is submitted for approval, you can't change the diagram.

Related topics

- Share a modeling diagram
- Commit diagram changes
- Save as a new version

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Duplicate a modeling diagram

Synchronize a shape to the database

Add related records in the modeling diagram

Delete a shape

Synchronize a shape to the database

Add a shape to a diagram.

Before you begin

Role required: sn_apm.apm_user

Note:
You must have the Owner or Editor access to the artifact or diagram and must have read access to the shape entity.

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Modeling page by selecting the Modeling icon ( ).
3. Select an existing diagram from the Diagrams page.
4. Add a shape to an existing or new diagram.
   You can observe that the unsynced icon ( ) is displayed in the shape. It means, the shape hasn't yet synced with the ServiceNow database.
5. Open the context menu by selecting the shape.
6. Open the side panel with details for the selected shape by selecting the Open the side panel icon ( ).
7. Select and map an existing CI or create a CI for the shape.
   - To map an existing CI, select the **Choose Existing** button and select a CI from the drop-down.
   - To create a CI, select the **Create New** button and enter the details.
8. Send the shape or diagram for approval.
   After receiving the approval, you can see the **Commit** button to synchronize a shape or diagram, or a relationship to the database.
9. Select **Update**.
10. Select **Commit** to synchronize the object to the database and save the diagram.

Result

The shape gets synced to the ServiceNow database.

Related topics

Share a modeling diagram

Commit diagram changes

Save as a new version

Duplicate a modeling diagram

Submit a modeling diagram for approval

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Add related records in the modeling diagram

Delete a shape

Delete a shape

Delete a shape and all of its relationships from a diagram.

Before you begin

Role required: sn_apm.apm_user

Note:
You must have the Owner or Editor access to the artifact or diagram.

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Modeling page by selecting the Modeling icon ( ).
3. Select an existing diagram from the Diagrams page.
4. Edit the diagram as required.
5. Select a shape in the diagram.
6. From the More Actions menu ( ), select the **Delete shape from canvas**.
7. Confirm the deletion.

Result

The selected shape gets deleted from the canvas or from the model.

Related topics

Share a modeling diagram

Commit diagram changes

Save as a new version

Duplicate a modeling diagram

Submit a modeling diagram for approval

Synchronize a shape to the database

Add related records in the modeling diagram

Portfolio list view

As an Enterprise Architect, use the Portfolio list view in the Enterprise Architecture Workspace to manage your business architecture, application portfolio, technology portfolio, information portfolio of your organization and also manage your own entities.

The My Lists view shows a list of records that you have been assigned. Select the filter icon ( ) to check the applied fields.

You can save, filter and export, or email the list. You can also create your own list and access it from the My Lists page.

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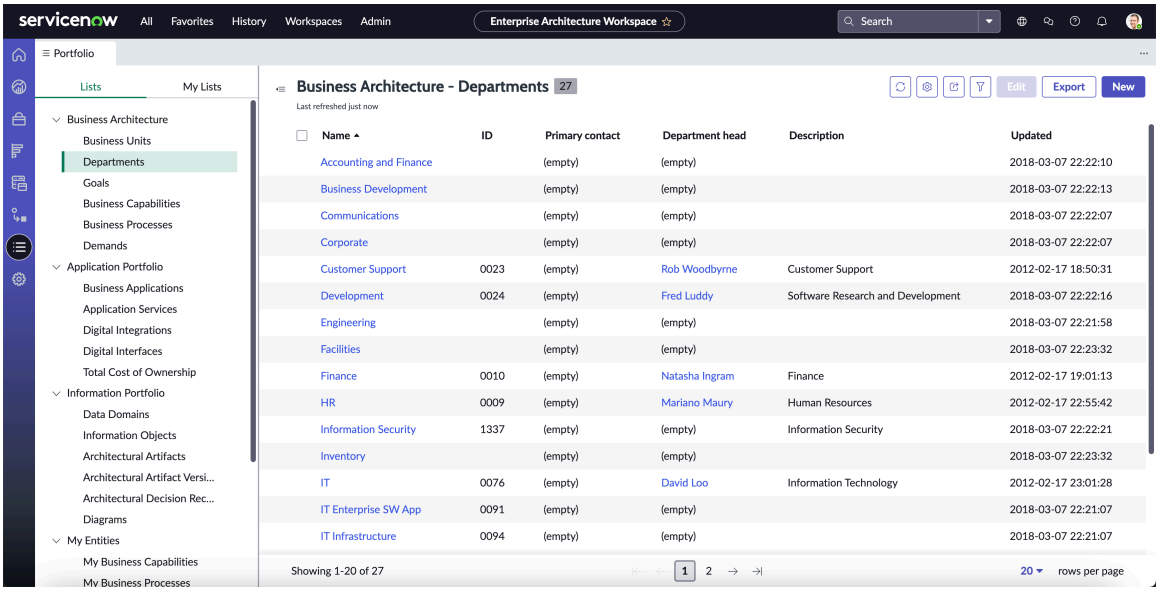
List view



Note:
In the Lists view, the Digital Integrations and Digital Interfaces are displayed only when the Digital Integration Management plugin (com.snc.apm_di) is installed. The Diagrams tab under Architectural Artifacts is displayed in the list only when the Lucidchart Integration plugin (sn_lcdchart_int) is installed.

Lists

The Lists view enables you to manage your portfolios and all your own entities.

You can see the following portfolio items in the **Portfolio > List** view:

- Business Architecture
- Application Portfolio
- Information Portfolio
- My Entities

My Lists

Any list that you create appear in the My Lists section. Lists in this section are only visible to you.

Create my list

Create your own filtered lists in the workspace and access them under the **My Lists** tab.

Before you begin
Role required: sn_apm.apm_analyst

Procedure

1. Navigate to **All** > **Application Portfolio Management** > **Enterprise Architecture Workspace** > **Workspace Home**.
2. Open the Portfolio List view by clicking the Portfolio icon .
3. Select **My Lists**.
4. Select the Add New list.

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5. Create a new list that is either from an existing list or is completely new.
   - If creating a new list from an existing list, then select **Start from existing** and fill in the fields on the form.

New List form

Field	Description
List	Existing list that you want to modify. The menu displays all available admin-defined lists for selection.
List Name	Name for your list. By default this field appends the following code to the list selected in the previous menu: `_Copy` .
Select columns	Record fields to include in the list view. Columns from the list you selected appear. Add or remove columns to create the list you like as needed.
Add Filters	Condition builder to create filters that appear in your **My Lists** tab. By default, the conditions applied to the selected list appear.

   - If creating a new list from nothing, then select **Create your own** and fill in the fields on the form.

New List form

Field	Description
List Name	Name for your list.
Select Source	Table the records come from.
Select columns	Record fields to include in list view. Select the columns that display in the list. By default, this field populates with columns from a Workspace list view if one exists. If a Workspace list doesn't exist, the columns are populated with the Default list view of the table selected.
Add filters	Condition builder that is applied to the list.

6. Select **Create**.

Result
The list appears in the **My Lists** tab.

Working with business architecture

The Business Architecture section within the Portfolio page of the Enterprise Architecture Workspace helps you in the structuring of your business functions and strategies.

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Manage business units

Business units are part of your organization that are responsible for certain operations and have their own objectives.

Business units usually comprise departments and they have their own set of requirements regarding hardware and software, to meet their organizational objectives.

Using the Enterprise Architecture Workspace, business units can manage their business applications effectively.

View all business units

You can view the list of all available business units in the Enterprise Architecture Workspace.

Before you begin

Role required: sn_apm.apm_admin or business_planner or pps_admin

Procedure

1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Portfolio List view by selecting the Portfolio icon .
3. Select the expand row icon ( ) next to **Business Architecture**.
4. Select **Business Units**.

Add or edit a business unit

Create or edit a business unit to define your organizational functions.

Before you begin

Role required: sn_apm.apm_admin and business_planner

Procedure

1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Portfolio List view by selecting the Portfolio icon .
3. Select the expand row icon ( ) next to **Business Architecture**.
4. Select **Business Units**.
5. Add or edit a business unit.
   - To add a business unit, select **New**.
   - To update details of an existing business unit, select the business unit.
6. On the form, fill in the fields.
   For field information, see Create a new business unit form.
7. Select **Save**.

Manage departments

Departments are specialized functional areas within an organization, having their own specified roles and objectives. Departments are subsets of business units.

Each department contributes to the overall strategy and goals of its related business unit. Using the Enterprise Architecture Workspace, departments can be associated with the relevant business units and the business applications that each department uses can be

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tracked efficiently. This enables for effective alignment of technology and applications with the requirements and objectives of both the department and its associated business unit.

You can also add users to a department.

View all departments

You can view the list of all available departments in the Enterprise Architecture Workspace.

Before you begin
Role required: sn_apm.apm_user

Procedure

1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Portfolio List view by selecting the Portfolio icon .
3. Select the expand row icon ( ) next to **Business Architecture**.
4. Select **Departments**.

Add or edit a department

You can create or edit departments to effectively manage and optimize business applications by providing a structured approach to align the business applications with the strategic goals of the organization.

Before you begin
Role required: user_admin

Procedure

1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Portfolio List view by selecting the Portfolio icon .
3. Select the expand row icon ( ) next to **Business Architecture**.
4. Select **Departments**.
5. Add or edit a department.
   - To add a department, select **New**.
   - To update details of an existing department, select the department.
6. On the form, fill in the fields.
   For field information, see Create new department form.
7. Select **Save**.

Add a user to a department

You can add users to departments, thereby enabling the departments to perform their specific tasks and reach their desired objectives. Users can contribute to the decision-making process of a department by providing their insights. This leads to optimized usage of business applications and increased cost savings.

Before you begin
Role required: user_admin

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Procedure

1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Portfolio List view by selecting the Portfolio icon .
3. Select the expand row icon ( ) next to **Business Architecture**.
4. Select **Departments**.
5. Select the department that you want to add users to.
   A new page appears and the details of the department are displayed.
6. Select the **Users** tab.
7. On the form, fill in the fields.
   For a description of the field values, see Create new user form.
8. Select **Save**.

Manage goals

Goals are important for aligning and optimizing investments in business applications and for driving strategic outcomes.

You can define and track goals and their outcomes as objectives. This enables the prioritization and effective allocation of business applications, confirming the adherence to the organization's strategic needs and objectives.

Using the Enterprise Architecture Workspace, you can perform the following:

- Create goals and assign contributors
- Track goals to completion
- Add quantitative targets to goals
- Add qualitative targets to goals
- Add sub-goals
- Add demands to a goal

View all goals

You can view the list of all available goals in the Enterprise Architecture Workspace.

Before you begin

Role required: sn_gf.goal_user_read

Procedure

1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Portfolio List view by selecting the Portfolio icon .
3. Select the expand row icon ( ) next to **Business Architecture**.
4. Select **Goals**.

Add or edit a goal

Create or edit a goal to track and optimize your investments in business applications.

Before you begin

Role required: sn_gf.goal_user

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Procedure

1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Portfolio List view by selecting the Portfolio icon .
3. Select the expand row icon ( ) next to **Business Architecture**.
4. Select **Goals**.
5. Add or edit a goal.
   - To add a goal, select **New**.
   - To update details of an existing goal, select the goal.
6. On the form, fill in the fields.
   For field information, see Create new goal form.
7. Select **Save**.

Add a quantitative target to a goal

You can add a quantitative target to track the progress of achieving a goal. It's a numbers-based measurable target set to track the performance of a goal.

Before you begin

Role required: sn_gf.goal_user

Procedure

1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Portfolio List view by selecting the Portfolio icon .
3. Select the expand row icon ( ) next to **Business Architecture**.
4. Select **Goals**.
5. Select the goal that you want to add a quantitative target to.
   A new page appears and the details of the goal are displayed.
6. Select the **Quantitative Targets** tab.
7. Select **New**.
8. On the form, fill in the field.
   For a description of the field values, see Create new target form.
9. Select **Save**.

Add a qualitative target to a goal

You can add a qualitative target to track the progress of achieving a goal. It's a non-measurable and interpretation-based target, set to track the performance of a goal.

Before you begin

Role required: sn_gf.goal_user

Procedure

1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Portfolio List view by selecting the Portfolio icon .
3. Select the expand row icon ( ) next to **Business Architecture**.

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4. Select **Goals**.
5. Select the goal that you want to add a qualitative target to.
   A new page appears and the details of the goal are displayed.
6. Select the **Qualitative Targets** tab.
7. Select **New**.
8. On the form, fill in the field.
   For a description of the field values, see Create new target form.
9. Select **Save**.

Create a sub-goal

You can create sub-goals that are associated with your main goals. Sub-goals are more specific in nature and consist of actionable items that contribute to the completion of the parent goal.

Before you begin

Role required: sn_gf.goal_user

Procedure

1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Portfolio List view by selecting the Portfolio icon .
3. Select the expand row icon ( ) next to **Business Architecture**.
4. Select **Goals**.
5. Select the goal that you want to add a sub-goal to.
   A new page appears and the details of the goal are displayed.
6. Select the **Sub-goals** tab.
7. Select **New**.
8. On the form, fill in the field.
   For a description of the field values, see Create new goal form.
9. Select **Save**.

Manage value streams

Value streams provide a structured approach to manage and improve the usage of business applications.

A value stream is a sequence of activities that helps you visualize the flow of a process from start to finish, the value of each step in the flow, and the application models associated with each step in the flow.

You require the Value stream artifacts (sn_value_stream) plugin to view or create value streams in the Enterprise Architecture Workspace.

Hire to Retire is a value stream that encompasses the lifecycle of an employee within an organization, from the time they are hired until they retire. This value stream will containing stages such as onboarding, development, retention, offboarding, etc.

View all value streams

You can view the list of all available value streams in the Enterprise Architecture Workspace.

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Before you begin

You require the Value stream artifacts (sn_value_stream) plugin to work with value streams in the Enterprise Architecture Workspace.

Role required: sn_apm.apm_user

Procedure

1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Portfolio List view by selecting the Portfolio icon .
3. Select the expand row icon ( ) next to **Business Architecture**.
4. Select **Value Streams**.

Add or edit a value stream

Create or edit a value stream to organize and understand the flow of value creation in your organization.

Before you begin

Role required: sn_apm.apm_user

Procedure

1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Portfolio List view by selecting the Portfolio icon .
3. Select the expand row icon ( ) next to **Business Architecture**.
4. Select **Value Streams**.
5. Add or edit a value stream.
   - To add a value stream, select **New**.
   - To update details of an existing value stream, select the value stream.
6. On the form, fill in the fields.
   For field information, see Create new value stream form.
7. Select **Save**.

Add a value stream to a business process

Add a value stream to business processes to maintain an efficient workflow and to drive improvement within the business process.

Before you begin

You require the Value stream artifacts (sn_value_stream) plugin to work with value streams in the Enterprise Architecture Workspace.

Role required: sn_apm.apm_user

Procedure

1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Portfolio List view by selecting the Portfolio icon .
3. Select the expand row icon ( ) next to **Business Architecture**.

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4. Select **Value Streams**.
5. Select the value stream that you want to add a business process to.
   A new page appears, displaying the details of the value stream.
6. Select the **Value Stream to Processes** tab.
7. Select **New**.
8. On the form, fill in the field.
   For a description of the field values, see Create new value stream to process form.
9. Select **Save**.

Add an application model to a value stream

You can add an application model to a value stream to better manage your application portfolios. This ensures that any hardware/software investments are tied to the organizational goal and requirement.

Before you begin

You require the Value stream artifacts (sn_value_stream) plugin to work with value streams in the Enterprise Architecture Workspace.

Role required: sn_apm.apm_user

Procedure

1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Portfolio List view by selecting the Portfolio icon .
3. Select the expand row icon ( ) next to **Business Architecture**.
4. Select **Value Streams**.
5. Select the value stream that you want to add a application model to.
   A new page appears, displaying the details of the value stream.
6. Select the **Applications Model** tab.
7. Select **New**.
8. On the form, fill in the field.
   For a description of the field values, see Create new application model form.
9. Select **Save**.

Manage value stream stages

Value stream stages are a specific section within the overall value stream, encompassing a specific set of activities.

A value stream is made up of multiple value stream stages. The stages are organized in a sequence, ensuring that each stage add value to the overall value stream.

You require the Value stream artifacts (sn_value_stream) plugin to view or create value stream stages in the .

In the Hire to Retire value stream, onboarding of new employees is a value stream stage.

View all value stream stages

You can view the list of all available value streams stages in the Enterprise Architecture Workspace.

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Before you begin

You require the Value stream artifacts (sn_value_stream) plugin to work with value streams in the Enterprise Architecture Workspace.

Role required: sn_apm.apm_user

Procedure

1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Portfolio List view by selecting the Portfolio icon .
3. Select the expand row icon ( ) next to **Business Architecture**.
4. Select **Value Stream Stages**.

Add or edit a value stream stage

Create or edit a value stream stage to improve the efficiency of a value stream and verify each step adds value to the output of the value stream.

Before you begin

You require the Value stream artifacts (sn_value_stream) plugin to work with value streams in the Enterprise Architecture Workspace.

Role required: sn_apm.apm_user

Procedure

1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Portfolio List view by selecting the Portfolio icon .
3. Select the expand row icon ( ) next to **Business Architecture**.
4. Select **Value Stream Stages**.
5. Add or edit a value stream stage.
   - To add a value stream stage, select **New**.
   - To update details of an existing value stream stage, select the value stream stage.
6. On the form, fill in the fields.
   For field information, see Create new value stream stage form.
7. Select **Save**.

Manage business capabilities

A business capability is the ability of an organization to do its business activities successfully and fulfill its business goals.

Use the business capability mapping to establish a CI relationship between the business capability and the business applications. Establish a similar relationship between business capabilities and the application technologies to ascertain the risks involved in using them.

As business organizations grow, it's imperative for an enterprise architect to assess the business capabilities to know how to strengthen the business processes.

From the Portfolio page in Enterprise Architecture Workspace, you can perform the following:

- Create a business capability
- View existing business capabilities

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- Add a sub-capability
- Add architectural artifacts to a business capability

You can also view and add business capabilities and perform a host of other tasks relating to business capabilities, from the Business Portfolio page. For more information, see Managing a business portfolio.

View all business capabilities on the Portfolio page

You can view the list of all available capabilities in the Enterprise Architecture Workspace.

Before you begin

Role required: sn_apm.apm_user

Procedure

1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Portfolio List view by selecting the Portfolio icon .
3. Select the expand row icon ( ) next to **Business Architecture**.
4. Select **Business Capabilities**.
   You can also view the list of capabilities from the Business Portfolio page. For more information, see Managing a business portfolio.

Add or edit a business capability from the Portfolio page

Create or edit a business capability to align your organization's business goals.

Before you begin

Role required: sn_apm.apm_user

Procedure

1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Portfolio List view by selecting the Portfolio icon .
3. Select the expand row icon ( ) next to **Business Architecture**.
4. Select **Business Capabilities**.
5. Add or edit a capability.
   - To add a capability, select **New**.
   - To update details of an existing capability, select the capability.
6. On the form, fill in the fields.
   For field information, see Business Capability form.
7. Select **Save**.
   You can also add capabilities from the Business Portfolio page. For more information, see Add a business capability.

Create a sub-capability from the Portfolio page

You can add a sub-capability to a capability.

Before you begin

Role required: sn_apm.apm_user

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Procedure

1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Portfolio List view by selecting the Portfolio icon .
3. Select the expand row icon ( ) next to **Business Architecture**.
4. Select **Business Capabilities**.
5. Select the capability that you want to add a sub-capability to.
   A new page appears and the details of the capability are displayed.
6. Select the **Capabilities** tab.
7. Select **New**.
8. On the form, fill in the field.
   For a description of the field values, see Business Capability form.
9. Select **Save**.
   You can also add a sub-capability from the Business Portfolio page. For more information, see Create a sub-capability.

Create a Lucidchart diagram for a business capability in the EA Workspace

Create a diagram in Lucidchart for your business capability maps and associate it with an architectural artifact.

Before you begin

Ensure the following ServiceNow Store applications are installed:

- Lucidchart Diagramming Spoke [sn_lucdchart_spoke] (v 1.1.1)
- Lucidchart Integration [sn_lcdchart_int] (v 2.3.0)
- Personal Authentication [sn_ihub_personal_auth] (v 27.0.0)

Ensure a connection is established with Lucid. For details, see Create OAuth 2.0 Client in Lucidchart and Create a connection and credential alias for the Lucidchart diagramming spoke.

Role required: sn_apm.apm_analyst

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace** > **Portfolio**.
2. Select the expand row icon ( ) next to **Business Architecture**.
3. Select **Business Capabilities**.
4. Select a business application to open it.
5. Select the more actions menu and select **Create Diagram**.
6. On the Create Diagram form, fill in the fields.

   Note:
   Use the authorization link on the Create Diagram window, to generate an authentication token and fetch your Lucid folders to save the diagram.

   For field information, see Create diagram for a business capability.
7. Select **Create Diagram**.

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Result

After a successful submission, a link to the newly created Lucid diagram appears on top of the screen. You can select the link to navigate to the diagram. The Architectural Artifacts page shows the link to the Lucidchart diagram and an artifact name associated with it. You can select the respective link to access the artifact or diagram.

Manage architectural artifacts of a business capability in EA Workspace

You can create new, add, or remove the artifacts that are associated with a business capability.

Before you begin

Role required: sn_apm.apm_user

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Portfolio List view by selecting the Portfolio icon ( ).
3. Select the expand row icon ( ) next to **Business Architecture**.
4. Select **Business Capabilities**.
5. Select the name of a business capability to view the associated artifacts.
6. Select the **Architectural Artifacts** tab.
   A list of artifacts associated with the business capability is displayed.
7. To link an existing artifact to the business capability, select **Add**.
   In the **Add architectural artifact** pop-up window, select the existing artifact that you want to link to the business capability and select **Ok**.
8. Create or remove an artifact.
   - To create an artifact and associate it with the business capability, select **New**.
   - To remove an existing architectural artifact, select the artifact and then select **Remove**.
9. Fill in the form fields.
   For field information, see Architectural artifact form.
10. Select **Save**.

Manage business processes

Business processes are a structured sequence of tasks that are grouped, helping to accomplish specific outcomes.

You can create business processes or modify an existing one to align it with your business requirements.

Based on the requirements, the business capability hierarchy can be modeled using the business process relationship. You can edit the business process records using the CI relationships to create a business process hierarchy.

A business process or capability hierarchy is an ordered grouping of business processes in a hierarchical fashion.

Example: L0 and L1 business processes

L0 signifies the high-level process encompassing all activities associated with that process. For example, in the IT service management business process, the L0 business process encompasses all activities related to managing IT services within the organization.

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L1 signifies the specific tasks within the L0 business process. For example, within the IT service management business process, incident management is an L1 business process which specifically deals with logging, categorizing, and resolving incidents.

View all business processes

You can view the list of all available business processes in the Enterprise Architecture Workspace.

Before you begin

Role required: business_process_manager or asset or itil or sn_apm.apm_user

Procedure

1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Portfolio List view by selecting the Portfolio icon .
3. Select the expand row icon ( ) next to **Business Architecture**.
4. Select **Business Processes**.

Add or edit a business process

A business process is a collection of related structured tasks performed to accomplish a specific application service. Create a business process to group applications that help accomplish a specific application service.

Before you begin

Role required: business_process_manager or asset or itil or sn_apm.apm_user

Procedure

1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Portfolio List view by selecting the Portfolio icon .
3. Select the expand row icon ( ) next to **Business Architecture**.
4. Select **Business Processes**.
5. Add or edit a business process.
   - To add a business process, select **New**.
   - To update details of an existing business process, select the business process.
6. On the form, fill in the fields.
   For field information, see Create business process form.
7. Select **Save**.

Manage demands

You can use a demand as a step to identify cost-saving opportunities on applications or capabilities and to meet the target.

The strategy that you associate with the demand action decides the strategy for the application.

View all demands

You can create or edit a demand as a step to identify cost-saving opportunities on applications or capabilities, to meet the target.

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Before you begin
Role required: sn_apm.apm_user

Procedure
1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Portfolio List view by selecting the Portfolio icon .
3. Select the expand row icon ( ) next to **Business Architecture**.
4. Select **Demands**.

Add or edit a demand

You can create or edit a demand as a step to identify cost-saving opportunities on applications or capabilities, to meet a target.

Before you begin
Role required: sn_apm.apm_user

Procedure
1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Portfolio List view by selecting the Portfolio icon .
3. Select the expand row icon ( ) next to **Business Architecture**.
4. Select **Demands**.
5. Add or edit a demand.
   - To add a demand, select **New**.
   - To update details of an existing demand, select the demand.
6. On the Demand form, fill in the fields.
   For field information, see Create new demand form.
7. Select **Save**.
   To create a demand using the Application Portfolio Management app, see Add or edit a demand.

Working with an application portfolio

The Application Portfolio section within the Portfolio page of the Enterprise Architecture Workspace helps you to manage business applications, application services, digital integrations, and digital interfaces.

View all business applications

View the list of all business applications in the Enterprise Architecture Workspace.

Before you begin
Role required: sn_apm.apm_user

Procedure
1. Navigate to **Workspaces** > *Enterprise Architecture Workspace*.
2. Open the Portfolio List view by selecting the Portfolio icon ( ).

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3. Select the expand row icon ( ) next to **Application Portfolio**.
4. Select **Business Applications**.

Add a business application

Add the applications that your organization wants to introduce based on their functions and the business process they fulfill. In APM, add any business application that is used to assess and track costs, usage, business value, functional fitment, and risks.

Before you begin

Role required: sn_apm.apm_analyst (to add) or sn_apm.apm_user (to update)

About this task

If you have an APM user role (sn_apm.apm_user), use the Business Application Life-cycle Management services to request, add, or retire a business application.

Note:
To approve or reject the requests, you must be part of the Business Application Registration Approval Group.

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Portfolio List view by selecting the Portfolio icon ( ).
3. Select the expand row icon ( ) next to **Application Portfolio**.
4. Select **Business Applications**.
5. Add or edit a business application.
   - To add a business application, select **Add**.
   - To update the details of an existing business application, select the record and then select **Edit**.
6. On the form, fill in the fields.

   For field information, see Business Application Form.
7. Select **Save** or **Update**.

Create a diagram for a business application in the EA Workspace

Create a diagram for your business application hierarchy and associate it with an architectural artifact. Use the ServiceNow Enterprise Modeling and Visualization or Lucidchart to create a diagram for your business hierarchy.

Before you begin

For creating the diagram using the ServiceNow Enterprise Modeling and Visualization, you must activate the following ServiceNow Store applications. For more information, see Enterprise Modeling and Visualization in the EA Workspace.

- Enterprise Modeling and Visualization (app-modelling-tool)
- Diagram Builder (app-diagram-builder)
- APM Modelling tool Common (app-modelling-tool-common)

For creating the diagram using the Lucidchart, you must activate the following ServiceNow Store applications and establish a connection with Lucid:

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- Lucidchart Diagramming Spoke [sn_lucdchart_spoke] (v 1.1.1)
- Lucidchart Integration [sn_lcdchart_int] (v 2.3.0)
- Personal Authentication [sn_ihub_personal_auth] (v 27.0.0)

To establish a connection with Lucid, see Create OAuth 2.0 Client in Lucidchart and Create a connection and credential alias for the Lucidchart diagramming spoke.

Role required: Member of the Enterprise Architect group

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace** > **Portfolio**.
2. Select the expand row icon ( ) next to **Application Portfolio**.
3. Select **Business Applications**.
4. Select a business application to open it.
5. Select the more actions menu ( ) and select **Create Diagram**.
6. On the Create Diagram form, fill in the fields.

   For field information, see Create diagram form for a business application.

   Note:
   For Lucidchart, use the authorization link on the Create Diagram window, to generate an authentication token and fetch your Lucid folders to save the diagram.

7. Select **Create Diagram**.

Result

After a successful submission, a link to the newly created diagram appears on top of the screen. You can select the link to navigate to the diagram. The Architectural Artifacts page shows the link to the diagram and an artifact name associated with it. You can select the respective link to access the artifact or diagram.

Open business application form in Core UI from EA Workspace

Open the business application form in Core UI from the EA Workspace to view and edit the business application form in the APM view.

Before you begin

Role required: admin

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Portfolio List view by clicking the Portfolio icon ( ).
3. Select the expand row icon ( ) next to **Application Portfolio**.
4. Select **Business Applications**.
5. Select a business application and open it.
6. Select the more actions icon ( ) and select **View form in** *`Core UI`*.
   For field information, see Business Application Form.

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View a unified map for a business application

View a unified map for your business applications in the Enterprise Architecture Workspace to better understand the current architecture and associated references.

Before you begin

Ensure that the CMDB Workspace plugin (sn_cmdb_ws) (version 4.0.1 or later) is installed.

Role required: sn_apm.apm_user and sn_cmdb_user

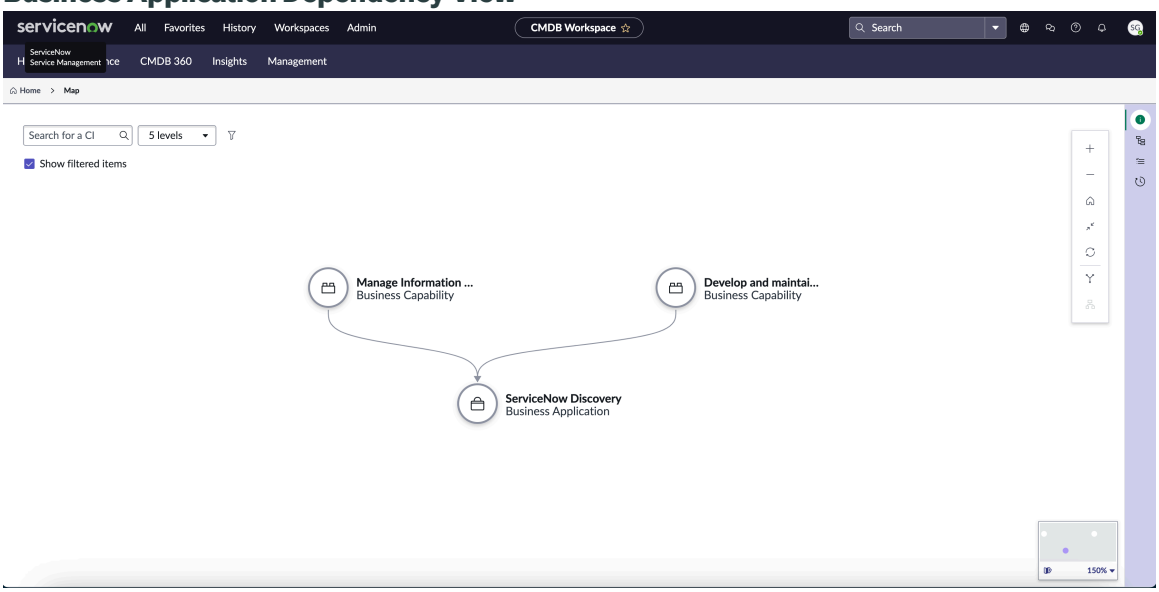
Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace** > **Portfolio**.
2. Open the Portfolio List view by clicking the Portfolio icon ( ).
3. Select the expand row icon ( ) next to **Application Portfolio**.
4. Select **Business Applications**.
5. Select a business application to open it.
6. Select **Open Map**.

Result

In the EA Workspace version 2.1.1, the unified map for the selected business application is opened in the CMDB Workspace. For more details on the unified map, see Unified Map .

Business Application Dependency View



In the EA Workspace version 2.2.0 or later, the unified map for the selected business application is opened in a new tab within the EA Workspace.

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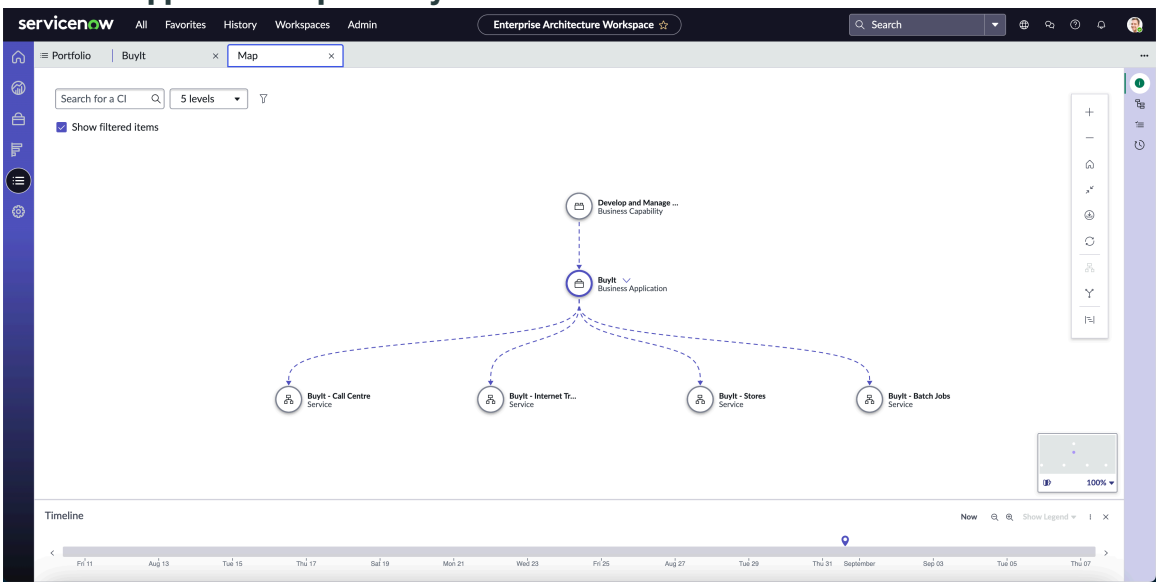
Business Application Dependency View



View roadmap of a business application

View the roadmap of your business applications and align them with the organization's strategy. Creating a portfolio plan helps you plan, prioritize, and roadmap the work for your business application.

Before you begin

Ensure that the Strategic Planning plugin (com.sn_apw_advanced) (v4.0.2 or later) is installed.

Role required: sn_apm.apm_user and sn_align_core.apw_user

Procedure

1. Open the **View roadmap** option using the following navigation.
   - From the Business Portfolio page:
     a. Navigate to **Workspaces** > **Enterprise Architecture Workspace** > **Business Portfolio**
     b. Select the expand row icon ( ) next to a business capability.
     c. Select the row context menu icon ( ) for a business application and select **View roadmap**.
   - From the Portfolio page:
     a. Navigate to **Workspaces** > **Enterprise Architecture Workspace** > **Portfolio**
     b. Select#**Business Applications**.
     c. Select a business application to open it.
     d. Select the more actions menu ( ) and select **View roadmap**.

   You're navigated to the Planning page of the Strategic Planning Workspace. A temporary portfolio plan is created in the Strategic Planning Workspace with all the planning items that are associated with the business application.

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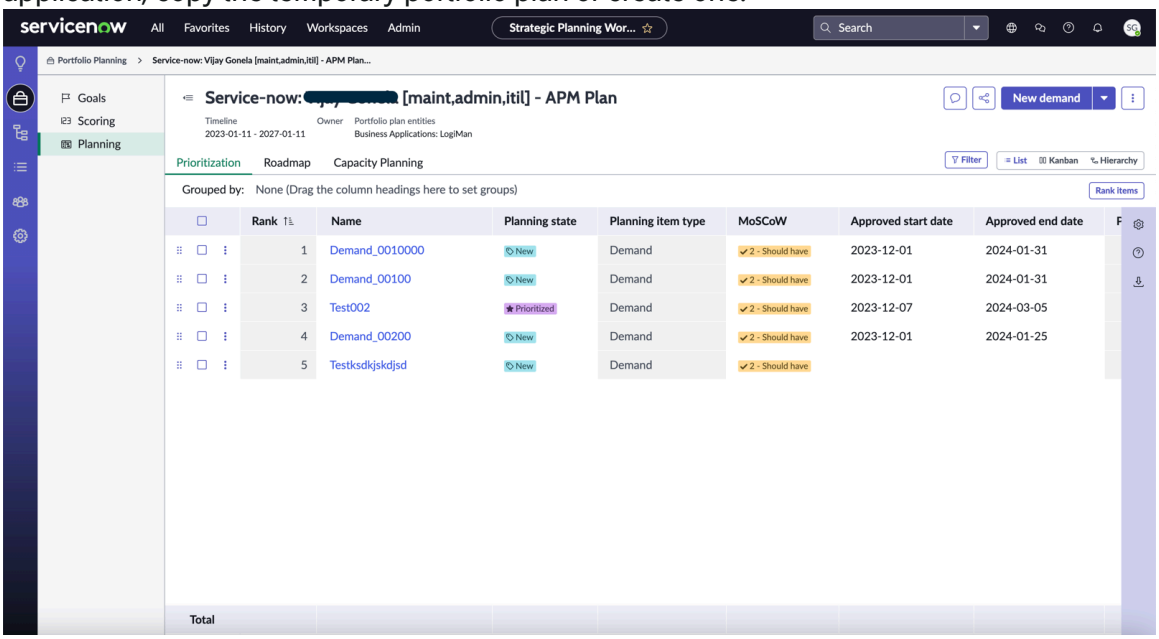
Note:
The temporary portfolio plan is meant for preview purpose only. To plan, prioritize, and roadmap the work for your business application, copy the temporary portfolio plan or create one.



2. **Optional:** Copy the portfolio plan for your business application to plan, prioritize, and roadmap the work for your business application.

   a. From the portfolio plan header, select the more actions icon ( ) and then select **Copy portfolio plan**.

   b. On the Copy portfolio plan window, fill in the details.

      i. Enter a name for the portfolio plan in the#**Portfolio plan name** field.

      ii. (Optional)#Grant access to the users of the portfolio plan by selecting the **Share with same users and groups** option.

   c. Select **Confirm**.

   Alternatively, you can also create your own portfolio plan in the Strategic Planning Workspace (SPW) using the Business Capability lens. For more information, see Create a portfolio plan in Strategic Planning.

Manage information objects of a business application in EA Workspace

Relate a business application to an information object using the CI relationship [cmdb_rel_ci] table of type Uses::Used by. Use this suggested relationship to get the logical data of the information object, which can be used to leverage the business application.

Before you begin

Role required: sn_apm.apm_user

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Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Portfolio List view by selecting the Portfolio icon ( ).
3. Select the expand row icon ( ) next to **Application Portfolio**.
4. Select **Business Applications**.
5. Select the name of a business application to view the associated artifacts.
6. Select the **Information Objects** tab.
   A list of information objects associated with the business application is displayed.
7. To relate an existing information object to the business application, select **Add**.
8. On the form, fill in the fields.
   For field information, see Add relationship form.
9. Select **Save**.
10. To delete a relationship between a business application and an information object, select an information object then select **Delete Relationship**.

    The relationship between the business application and the information object, and the attributes of the relationship gets deleted.

11. To edit an existing relationship details, select an information object then select **Edit**.
    Edit the details in the **Manage Relationship** form and select **Update**.

Manage architectural artifacts of a business application in EA Workspace

You can create new, add, or remove the artifacts that are associated with a business application.

Before you begin

Role required: sn_apm.apm_user

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Portfolio List view by selecting the Portfolio icon ( ).
3. Select the expand row icon ( ) next to **Application Portfolio**.
4. Select **Business Applications**.
5. Select the name of a business application to view the associated artifacts.
6. Select the **Architectural Artifacts** tab.
   A list of artifacts associated with the business application is displayed.
7. To link an existing artifact to the business application, select **Add**.
   In the **Add architectural artifact** pop-up window, select the existing artifact that you want to link to the business application and select **Ok**.
8. Create or remove an artifact.
   - To create an artifact and associate it with the business application, select **New**.
   - To remove an existing architectural artifact, select the artifact and then select **Remove**.
9. Fill in the form fields.
   For field information, see Architectural artifact form.
10. Select **Save**.

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View all application services

View the list of all application services in the Enterprise Architecture Workspace.

Before you begin
Role required: admin

Procedure
1. Navigate to **Workspaces** > *Enterprise Architecture Workspace*.
2. Open the Portfolio List view by clicking the Portfolio icon ( ).
3. Select the expand row icon ( ) next to **Application Portfolio**.
4. Select **Application Services**.

Add or edit an application service in the Enterprise Architecture Workspace

Add or edit an application service of your organization in the Enterprise Architecture Workspace.

Before you begin
Role required: sn_apm.apm_analyst

Procedure
1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Portfolio List view by clicking the Portfolio icon ( ).
3. Select the expand row icon ( ) next to **Application Portfolio**.
4. Select **Application Services**.
5. Add or edit an application service.
   - To add an application service, select **Add**.
   - To update details of an existing application service, select the record then select **Edit**.
6. On the form, fill in the fields.

   For field information, see Application service form.
7. Select **Save** or **Update**.

Manage application total cost of ownership (TCO)

The Application Total Cost of Ownership (TCO) plugin helps Enterprise Architects to evaluate the cost of business applications and leverage the application costs to prioritize the application portfolio and align with the organization's business strategy.

Application TCO indicators

The following indicators are added for Application TCO.

Indicator name	Description
Portfolio TCO	This indicator collects the total cost for a business application for a fiscal period.

You can view the assessment score of the Portfolio TCO indicator in the Application Rationalization List view.

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Tables installed with Application TCO

The following tables are installed with the Application TCO plugin:

Table	Description
Total Cost of Ownership - sn_apm_tco	Stores total cost of ownership details for all the business applications. You can see the details such as Cost type, Expense type, Cost, Fiscal period, Billing date, Vendor, Source, and Source cost type.
TCO Cost Type - sn_apm_tco_cost_type	Stores the TCO cost types within Enterprise Architecture Workspace for analysis and reporting.
TCO Source - sn_apm_tco_source	Stores the name of the TCO source.
TCO Source Cost Type - sn_apm_tco_source_cost_type	Stores the cost types used in the source.

Business rules added for Application TCO

The following business rules are added for Application TCO:

Business rule	Table	Description
Check for duplicate cost type	TCO cost type [sn_apm_tco_cost_type]	Checks for the duplicate name and expense type entry in the TCO cost type table.
Check for duplicate source name	TCO source [sn_apm_tco_source]	Checks for the duplicate source name entry in the TCO source table.
Check for duplicate source cost type	TCO source cost type [sn_apm_tco_source_cost_type]	Checks for the duplicate source and source cost type entry in the TCO source cost type table.

TCO dashboards

The **Portfolio TCO** tab in the **Dashboards** page displays the following dashboards for Application TCO:

- Business Application TCO for current quarter and previous quarter
- Business Application TCO trend for year
- Business Application TCO by application category for current quarter and previous quarter.
- Business Application TCO by application planned disposition for current quarter

For more details, see Working with the Enterprise Architecture Workspace dashboard.

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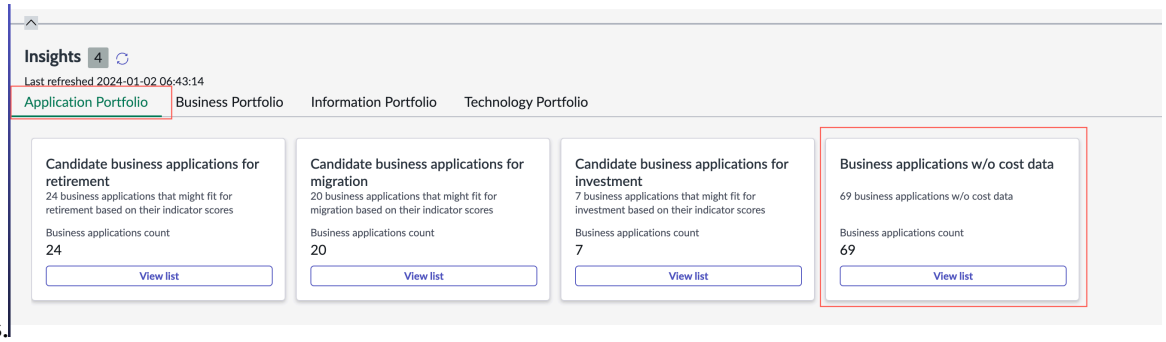
Application TCO insights

The Insights section in the Enterprise Architecture Workspace home page displays insights for your business applications.



Related topics

- Configure application total cost of ownership (TCO) in Enterprise Architecture Workspace
- Install the Application Total Cost of Ownership (TCO) plugin

Install the Application Total Cost of Ownership (TCO) plugin

Install the Application TCO store application that you purchased from the ServiceNow Store to make it available on your instance.

Before you begin

Note:
The Application TCO plugin automatically gets installed when you install the Enterprise Architecture Workspace plugin.

Role required: admin

Procedure

1. Navigate to **All** > **System Applications** > **All**.
2. Find the application using the filter criteria and search bar.

   You can search for the application by its name or ID. If you can't find an application, you may have to request it from the ServiceNow Store.

   Visit the ServiceNow Store website to view all the available apps and for information about submitting requests to the store.
3. Select a version from the list and select **Install**.
4. Select the **Load demo data** check box to install the demo data.
   Demo data comprises the sample records that describe application features for the common use cases. Load the demo data when you first install the application on a development or test instance.
5. Select **Install**.

View all total cost of ownership records

View the list of all total cost of ownership (TCO) records in the Enterprise Architecture Workspace.

Before you begin

Role required: admin

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Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Portfolio List view by selecting the Portfolio icon .
3. Select the expand row icon ( ) next to **Application Portfolio**.
4. Select **Total Cost of Ownership**.

Add or edit a total cost of ownership record

Create a new entry for total cost of ownership (TCO) record to evaluate the cost of your business applications.

Before you begin

Role required: admin

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Portfolio List view by selecting the Portfolio icon .
3. Select the expand row icon ( ) next to **Application Portfolio**.
4. Select **Total Cost of Ownership**.
5. Add or edit a TCO record.
   - To add a new TCO record, select **New**.
   - To update details of an existing TCO record, select the information object.
6. Select **New**.
7. Fill in the form fields.
   For field information, see New total cost of ownership form.
8. Select **Save**.

Digital integrations in Enterprise Architecture Workspace

Manage all your digital integrations in the Enterprise Architecture Workspace.

The digital integration functionality in Enterprise Architecture Workspace helps you to understand the business purposes for your applications, for their connection, and for their interaction. Install the Enterprise Architecture Integration Management (sn_apm_di) plugin from the ServiceNow Store.

You can do the following:

- Proactively find out the issues of the integrations at one place.
- Manage the information flows across your organization.
- Have complete governance over the use of interfaces for internal and external APIs.

The digital integration represents the integration between two business applications. In a typical scenario there would be a consuming business application, a provider business application, and an interface that is provided by the provider business application. The digital integration contains the metadata on the integration, including name, version, type, data flow direction, middleware used, owners, and so on.

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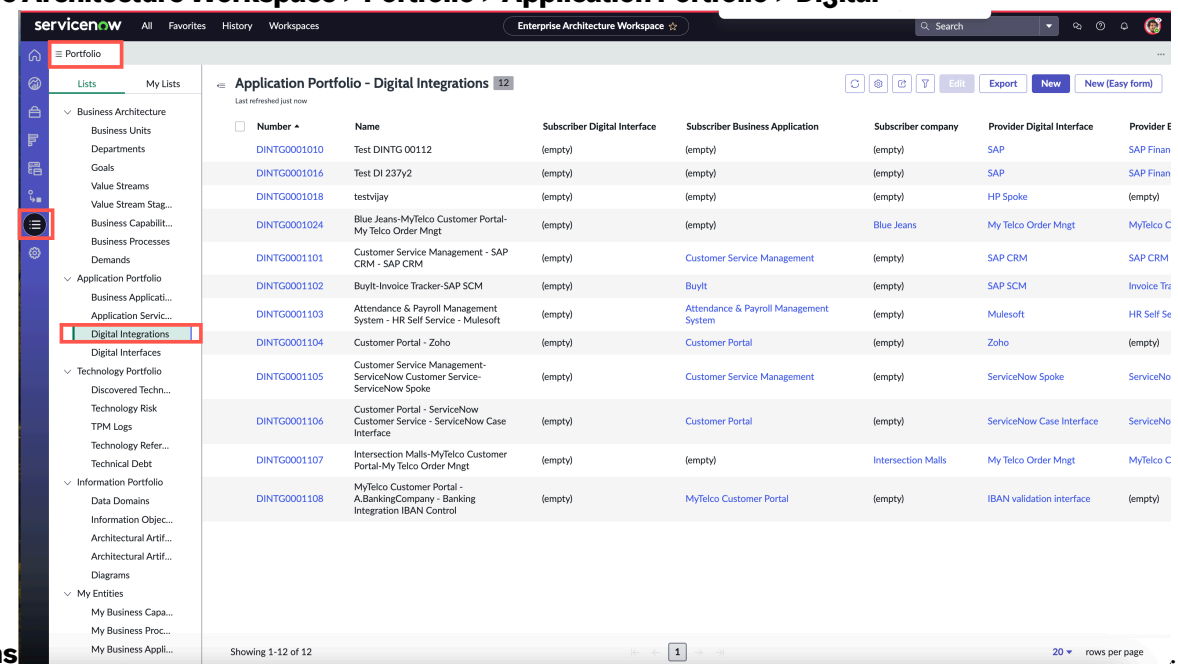
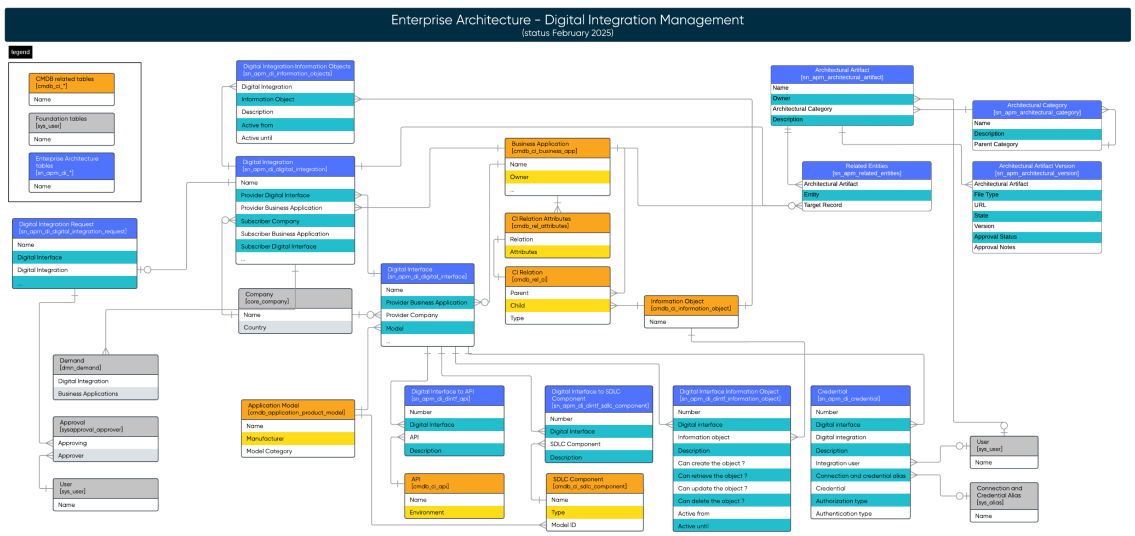
An easy form for digital integration enables the creation of a digital integration from a single page, including the introduction of a new digital interface if it doesn't exist. The digital integrations are saved in the Digital Integration [sn_apm_di_digital_integration] table. After a digital integration is created, a CI relationship link gets created between the two business applications with the type of interface. This link enables you to access the integration as part of the node map for any business application. A new catalog entry is provided to request an approval for a new digital integration. After the request is approved, the integration gets created.

The Digital Integrations page displays a list of existing digital integrations and their related information. You can access the Digital Integrations page by navigating to **Workspaces > Enterprise Architecture Workspace > Portfolio > Application Portfolio > Digital Integrations**.



Digital integration management data model

This section shows the digital integration management data model.



View all digital integrations

View the list of all your digital integrations in the Enterprise Architecture Workspace.

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Before you begin
Role required: sn_apm.apm_read

Procedure
1. Navigate to **Workspaces** > *Enterprise Architecture Workspace*.
2. Open the Portfolio List view by clicking the Portfolio icon ( ).
3. Select the expand row icon ( ) next to **Application Portfolio**.
4. Select **Digital Integrations**.

Add or edit a digital integration in the EA Workspace

Add a digital integration or edit an existing digital integration in the EA Workspace. The digital integration is a design object used by the Enterprise Architects. It describes a connection between two business applications or between a business application and an external service (for example: AWS, Yahoo, a TimeZone Conversion service) that provides an interface (API) to interact with.

About this task
The digital integration form helps you define why a connection is required between two data entities. You can define the interface where they should communicate. You can provide a link to relevant designs and architectural material in the description. A Digital Integration underpins a business capability and provides business value.

Before you begin
Role required: sn_apm.apm_analyst

Procedure
1. Navigate to **Workspaces** > *Enterprise Architecture Workspace*.
2. Open the Portfolio List view by selecting the Portfolio icon ( ).
3. Select the expand row icon ( ) next to **Application Portfolio**.
4. Select **Digital Integrations**.
5. Add or edit a digital integration.
   - To add a digital integration, select **New** or **New (Easy form)**.
   - To update an existing digital integration, select the digital integration, select **Edit**.
6. On the **Digital Integration** form, fill in the fields.

   For a description of the field values, see Digital integration form (easy form) in EA Workspace or Digital integration form in EA Workspace.
7. Select **Add** or **Update**.

Result
After submission of the form, within the CMDB platform, a CI relationship (Interfaces::Interfaced By) gets created between provider and subscriber business applications. In the case where the digital interface has no relation to a business application (using Open or Public API), the digital integration is created between the subscriber business application and a standalone digital interface.

Manage architectural artifacts of a digital integration in EA Workspace

You can create new, add, or remove the artifacts that are associated with a digital integration.

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Before you begin

Role required: sn_apm.apm_user

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Portfolio List view by selecting the Portfolio icon ( ).
3. Select the expand row icon ( ) next to **Application Portfolio**.
4. Select **Digital Integrations**.
5. Select the name of a digital integration to view the associated artifacts.
6. Select the **Architectural Artifacts** tab.
   A list of artifacts associated with the digital integration is displayed.
7. To link an existing artifact to the digital integration, select **Add**.
   In the **Add architectural** artifact pop-up window, select the existing artifact that you want to link to the digital integration and select **Ok**.
8. Create or remove an artifact.
   - To create an artifact and associate it with the digital integration, select **New**.
   - To remove an existing architectural artifact, select the artifact and then select **Remove**.
9. Fill in the form fields.
   For field information, see Architectural artifact form.
10. Select **Save**.

Digital interfaces in Enterprise Architecture Workspace

Manage all your digital interfaces from the Portfolio page of the Enterprise Architecture Workspace.

Digital interfaces are provided as part of a business application, but they can also stand on their own. Interfaces provide a way for other business applications to interact with the applications. An interface contains the metadata about itself, such as its Name, Version, Owners, Protocol. It also contains a list of all the integrations that are using that interface.

The Digital Interfaces page displays a list of existing digital interfaces and their related information. You can access the Digital Interfaces page by navigating to **Workspaces** > **Enterprise Architecture Workspace** > **Portfolio** > **Application Portfolio** > **Digital Interfaces**.

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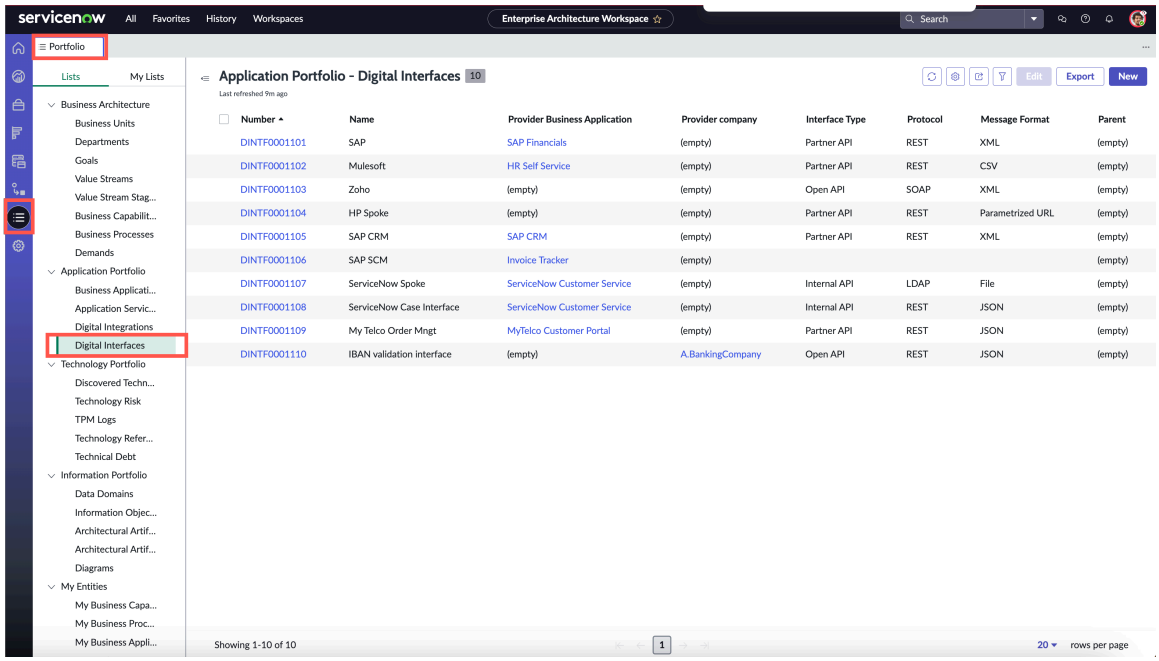
Digital Interfaces



Related topics

View all digital interfaces

Add or edit a digital interface in the EA Workspace

View all digital interfaces

View the list of all your digital interfaces in the Enterprise Architecture Workspace.

Before you begin

Role required: sn_apm.apm_read

Procedure

1. Navigate to **Workspaces** > *Enterprise Architecture Workspace*.
2. Open the Portfolio List view by clicking the Portfolio icon ( ).
3. Select the expand row icon ( ) next to **Application Portfolio**.
4. Select **Digital Interfaces**.

Add or edit a digital interface in the EA Workspace

Add or edit a digital interface for an integration to describe how business applications can interact.

About this task

Each business application or an application service you interact with provides a logical high-level description of how to interface with the application or service. The digital interface is an object used in the design phase to describe how other services or business applications can interact. At the same level, you can define which information objects are provided or updated by this digital interface.

Before you begin

Role required: sn_apm.apm_analyst

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Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Portfolio List view by selecting the Portfolio icon ( ).
3. Select the expand row icon ( ) next to **Application Portfolio**.
4. Select **Digital Interfaces**.
5. Create or update a digital interface.
   - To create an interface, select **New**.
   - To update an existing interface, select a digital integration link to open it.
6. On the Digital Interface form, fill in the fields.

   For field information, see Digital interface form.
7. Select **Save**.

Connect a digital interface with the CMDB API in the EA Workspace

Create a relationship between a digital interface and a CMDB API. The relationship helps you find out which digital integration uses which API, which APIs are built out of the design specs of the digital interface, and what environments are deployed. The relationship helps to group the deployed APIs.

Before you begin

Activate the CMDB CI Class Models [app-cmdb-content] store app (version 1.49.0 or later). For instructions, see CMDB CI Class Models store app .

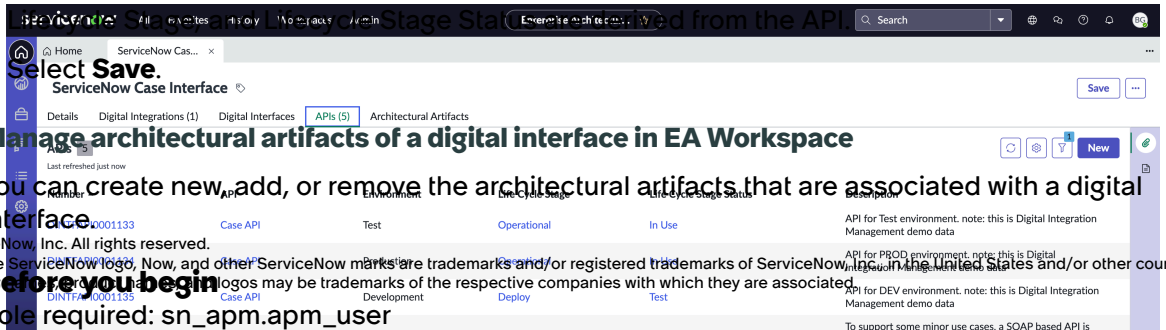
Role required: sn_apm.apm_analyst

About this task

One digital interface can be connected to one or more APIs. One API can be connected to only one digital interface.

Procedure

1. Navigate to **All** > **Workspaces** > **Enterprise Architecture Workspace**.
2. In the left navigation, open the Portfolio List view by selecting the Portfolio icon ( ).
3. Select the expand row icon ( ) next to **Application Portfolio**.
4. Select **Digital Interfaces**.
5. Select an existing digital interface.
6. Select the **APIs** tab.
7. Select **New**.
8. On the Digital Interface to API form, fill in the fields.
   For field descriptions, see Digital interface to API form. Information for the fields Environment, Lifecycle Stage, and Lifecycle Stage Status is derived from the API.
9. Select **Save**.



Manage architectural artifacts of a digital interface in EA Workspace

You can create new, add, or remove the architectural artifacts that are associated with a digital interface.

Before you begin

Role required: sn_apm.apm_user

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3. Select the expand row icon ( ) next to **Application Portfolio**.
4. Select **Digital Interfaces**.
5. Select an existing digital interface.
6. Select the **SDLC Components** tab.
7. Select **New**.
8. On the Digital Interface SDLC Component form, fill in the fields.
   For field descriptions, see Digital interface SDLC component form.
9. Select **Save**.

Relate an information object to a digital interface

Associate an information object to a digital interface in the Enterprise Architecture Workspace. You can also define how the information object should be consumed within the digital interface.

Before you begin

Role required: sn_apm.apm_analyst

About this task

A digital interface is related to a business application, and the business application will have related information objects. You can use this relationship to get the logical data of the information object, which can be used to leverage the business application.

Prior to linking the information objects to a digital interface that is provided by a business application, ensure that the information objects are linked to the business application. The Information Object field on the Create New Digital Interface Information Object form, shows the filtered list of information objects. For a digital interface provided by a company, you can select any available information object.

Procedure

1. Navigate to **All** > **Workspaces** > **Enterprise Architecture Workspace**.
2. In the left navigation, open the Portfolio List view by selecting the Portfolio icon ( ).
3. Select the expand row icon ( ) next to **Application Portfolio**.
4. Select **Digital Interfaces**.
5. Select an existing digital interface.
6. Select the **Information Objects** tab.
7. Select **New**.
8. On the Create New Digital Interface Information Object form, fill in the fields.
   For field descriptions, see Digital interface information object form.
9. Select **Save**.

Relate credentials to a digital interface

Relate and manage integration user and account for a digital interface to track which user is assigned to which digital interface.

Before you begin

Role required: sn_apm.apm_analyst

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About this task

You can also relate credentials to from a business application record or from a digital integration record.

Procedure

1. Navigate to **All** > **Workspaces** > **Enterprise Architecture Workspace**.
2. In the left navigation, open the Portfolio List view by selecting the Portfolio icon ( ).
3. Select the expand row icon ( ) next to **Application Portfolio**.
4. Select **Digital Interfaces**.
5. Select an existing digital interface.
6. Select the **Credentials** tab.
7. Select **New**.
8. On the Create New Credential form, fill in the fields.
   For field descriptions, see Digital interface credentials form.
9. Select **Save**.

Working with information portfolio

Use the information portfolio to capture information from the assets of your organization as information objects. You can categorize the information assets and determine its business application use. You can also connect the different layers where data exists and map the layers. Mapping helps to retrieve the information and track the information flow.

Information portfolio data model

The basic data model of information portfolio is in the introduction of two tables, which are Information Object and Data Domain.

- Information object is a configuration item that displays information in an organized form. The purpose of the information object is to logically describe the type of data (or the information) that is interchanged between the application and the database. The database being the one that serves the application with data.
- Data domain is to classify or categorize the information objects.

Enterprise Architecture integrates with information portfolio by relating a business application with the database. The database provides the information to the application using an intermediary CMDB CI class called information object [cmdb_ci_information_object] table.

The business application is related with the information object by establishing Uses::Used by CMDB CI relationship. The information object, in turn, is linked to the database catalog and instances by establishing Depends on::Used by CMDB CI relationship.

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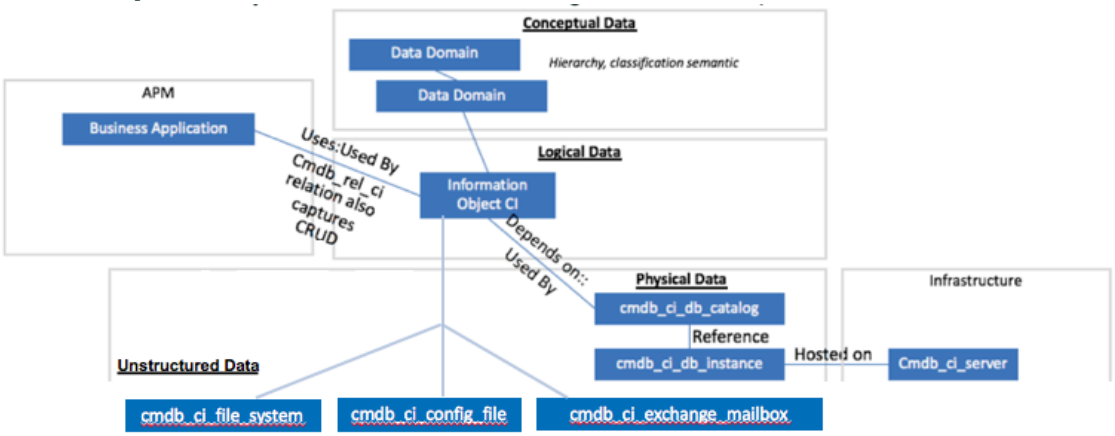
Information portfolio data model



Enterprise Architecture integrates with ServiceNow Discovery that finds database applications, database instances, and database catalog. The database catalog lists all the catalog objects, or databases, discovered for an instance of a database.

Plugin activation procedure

CMDB plugin has the Information Object (cmdb_ci_information_object) CI. When the Enterprise Architecture plugin is activated, the data domain field gets added to the cmdb_ci_information_object table. The data domain field references the Data Domain table, which is included in the Enterprise Architecture plugin.

Manage data domains

A data domain is a collection of information objects. A data domain categorizes information objects.

View all data domains

You can view the list of all data domains in the Enterprise Architecture Workspace.

Before you begin

- The Enterprise Architecture analyst and Enterprise Architecture administrator with sn_apm.apm_admin role have create, write, and delete privileges.
- The Enterprise Architecture user with the sn_apm.apm_user role has read access only.

Role required: sn_apm.apm_user

Procedure

1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Portfolio List view by selecting the Portfolio icon .
3. Select the expand row icon ( ) next to **Information Portfolio**.
4. Select **Data Domains**.

Add or edit a data domain from the Portfolio page

Create or edit a data domain to relate an information object to the database catalog of a database instance to collect the physical data.

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Before you begin

Although an Enterprise Architecture user (sn_apm.apm_user) can view a data domain, the access control on the Data Domain [sn_apm_data_domain] table is limited to its different users.

- The Enterprise Architecture analyst and Enterprise Architecture administrator with sn_apm.apm_admin role have create, write, and delete privileges.
- The Enterprise Architecture user with the sn_apm.apm_user role has read access only.

Role required: sn_apm.apm_admin

Procedure

1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Portfolio List view by selecting the Portfolio icon .
3. Select the expand row icon ( ) next to **Information Portfolio**.
4. Select **Data Domains**.
5. Add or edit a data domain.
   - To add a data domain, select **New**.
   - To update details of an existing data domain, select the data domain.
6. On the form, fill in the fields.
   For field information, see Data Domain form.
7. Select **Save**.
   You can also create data domains from the Setup page of Enterprise Architecture Workspace. For information, see Add or edit an information data domain.

Manage information objects

An information object captures the logical data for a business application. It also describes the type of data that is interchanged between the application and the database.

View all information objects

You can view the list of all information objects in the Enterprise Architecture Workspace.

Before you begin

Role required: sn_apm.apm_user

Procedure

1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Portfolio List view by selecting the Portfolio icon .
3. Select the expand row icon ( ) next to **Information Portfolio**.
4. Select **Information Objects**.

Create information object

Create an information object to capture the logical data for a business application.

Before you begin

Role required: sn_apm.apm_user

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You can create information object, relate business application to information object, and relate information object to database catalog.

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Portfolio List view by selecting the Portfolio icon .
3. Select the expand row icon ( ) next to **Information Portfolio**.
4. Add or edit an information object.
   - To add an information object, select **New**.
   - To update details of an existing information object, select the information object.
5. Fill in the form fields.
   For field information, see Create information object form.
6. Select **Save**.

Manage architectural artifacts

Architectural artifacts are created to describe a system, solution, or state of an enterprise. The goal of architectural artifacts in Enterprise Architecture is to enable enterprise architects to create and manage artifacts in their organization.

Sometimes you may rely on external sources to keep and maintain many of your enterprise architecture elements such as diagrams, reports, and other visualizations. The architectural artifacts feature makes it easy to associate these artifacts to the ServiceNow® objects such as business applications or business capabilities.

As an enterprise architect, you can use architectural artifacts to perform the following tasks:

- Review and approve architectural artifacts
- Track artifacts versions
- Relate architectural artifacts to categories that are configured to match the needs of the organization
- Associate your architectural artifacts to your organization's business capabilities, business applications, digital integrations, or digital interfaces.

The architectural artifacts feature extends the functionality of the ServiceNow® Document Management plugin (com.snc.platform_document_management) and can create a relationship with ServiceNow® objects: business applications, business capabilities, digital integrations, or digital interfaces.

View all architectural artifacts

You can view the list of all architectural artifacts in the Enterprise Architecture Workspace.

Before you begin

The permission set at the artifact level also determines if you can view the artifact.

Role required: sn_apm.apm_user or sn_apm.apm_admin

Procedure

1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Portfolio List view by selecting the Portfolio icon .

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3. Select the expand row icon ( ) next to **Information Portfolio**.
4. Select **Architectural Artifacts**.

Add or edit an architectural artifact from Portfolio page

Create an architectural artifact to align it with your business requirements.

Before you begin

The permission set at the artifact level determines if you can edit the artifact.

Role required: sn_apm.apm_user to add an architectural artifact.

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Portfolio List view by selecting the Portfolio icon .
3. Select the expand row icon ( ) next to **Information Portfolio**.
4. Select **Architectural Artifacts**.
5. Add or edit an architectural artifact.
   - To add an architectural artifact, select **New**.
   - To update details of an existing architectural artifact, select the architectural artifact.
6. Fill in the form fields.
   For field information, see Architectural artifact form.
7. Select **Save**.

[store-future: BEGIN review]

Add an architectural artifact version

You can create multiple versions of architectural artifacts.

Before you begin

Role required: Depends on the role permissions set for a particular architectural artifact.

Procedure

1. Navigate to **Workspace** > *`Enterprise Architecture Workspace`*.
2. Open the Portfolio List view by selecting the Portfolio icon .
3. Select the expand row icon ( ) next to **Information Portfolio**.
4. Select **Architectural Artifacts**.
5. Select the architectural artifact that you want to add a new version for.
   A new page appears and the details of the architectural artifact are displayed.
6. Select the **Architectural Artifact Versions** tab.
7. Select **Upload Version**.
8. On the form, fill in the fields.

   For a description of the field values, see Create new versions form.
9. Select **Save**.

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[End]

Add a related entity to an architectural artifact

Associate an architectural artifact to existing entities such as business capabilities, business applications, digital integrations, and digital interfaces. The association creates a relationship between the artifact and related entities.

Before you begin

Role required: sn_apm.apm_user

Procedure

1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Portfolio List view by selecting the Portfolio icon .
3. Select the expand row icon ( ) next to **Information Portfolio**.
4. Select **Architectural Artifacts**.
5. Select the architectural artifact that you want to add a related entity to.
   A new page appears and the details of the architectural artifact are displayed.
6. Select the **Related Entities** tab.
7. Select **New**.
8. On the form, fill in the fields.
   For a description of the field values, see Related Entities form.
9. Select **Save**.

Add a role permission for an architectural artifact

Role permissions refer to the access rights assigned to different roles to create, view, or edit architectural artifacts. These permissions enable only users having the authorized role to perform any actions on architectural artifacts.

Before you begin

Role required: All users with **Writer** permission assigned.

About this task

You can create role permissions and associate them with architectural artifacts. Based on your existing role, you can provide certain role permissions.

- If you're the owner of the architectural artifact, you can provide **Reader**, **Writer**, and **Owner** role permission to other users.
- If you're assigned the **Writer** role permission to an architectural artifact, you can provide **Writer** or **Reader** role permission to other users.
- If you're assigned the **Reader** role permission to an architectural artifact, you can't provide any role permission to other users.

Procedure

1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Portfolio List view by selecting the Portfolio icon .
3. Select the expand row icon ( ) next to **Information Portfolio**.
4. Select **Architectural Artifacts**.

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5. Select the architectural artifact that you want to associate role permissions with.
   A new page appears and the details of the architectural artifact are displayed.
6. Select the **Role Permissions** tab.
7. Select **New**.
8. On the form, fill in the fields.
   For a description of the field values, see Create new role permissions.
9. Select **Save**.

Add a user criteria permission for an architectural artifact

User criteria permissions refer to the access rights assigned to different user groups that are created based on certain criteria such as department, group, or organization. For example, all HR business partners are part of the Human Resources Business Partner (HRBP) group.

Before you begin
Role required: All users with **Writer** permission assigned.

About this task
You can create user criteria permissions and associate them with architectural artifacts. Based on your existing permission, you can provide certain user criteria permissions.

- If you're the owner of the architectural artifact, you can provide **Reader**, **Writer**, and **Owner** user criteria permission to other users.
- If you're assigned the **Writer** permission to an architectural artifact, you can provide **Writer** or **Reader** user criteria permission to other users.
- If you're assigned the **Reader** permission to an architectural artifact, you can't provide any user criteria permission to other users.

Procedure
1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Portfolio List view by selecting the Portfolio icon .
3. Select the expand row icon ( ) next to **Information Portfolio**.
4. Select **Architectural Artifacts**.
5. Select the architectural artifact that you want to associate user criteria permissions with.
   A new page appears and the details of the architectural artifact are displayed.
6. Select the **User Criteria Permissions** tab.
7. Select **New**.
8. On the form, fill in the fields.
   For a description of the field values, see Create new user criteria permissions.
9. Select **Save**.

Add a user permission for an architectural artifact

User permissions refer to the access rights assigned to a specific user to create, view, or edit architectural artifacts. These permissions enable only the authorized users to perform any actions on architectural artifacts. You can create user permissions and associate them with architectural artifacts.

Before you begin
Role required: All users with **Writer** permission assigned.

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About this task

You can create user permissions and associate them with architectural artifacts. Based on your existing permission, you can provide certain user permissions.

- If you're the owner of the architectural artifact, you can provide **Reader**, **Writer**, and **Owner** user permission to other users.
- If you're assigned the **Writer** permission to an architectural artifact, you can provide **Writer** or **Reader** user permission to other users.
- If you're assigned the **Reader** permission to an architectural artifact, you can't provide any user permission to other users.

Procedure

1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Portfolio List view by selecting the Portfolio icon .
3. Select the expand row icon ( ) next to **Information Portfolio**.
4. Select **Architectural Artifacts**.
5. Select the architectural artifact that you want to associate user permissions with.
   A new page appears and the details of the architectural artifact are displayed.
6. Select the **User Permissions** tab.
7. Select **New**.
8. On the form, fill in the fields.
   For a description of the field values, see Create new user permissions form.
9. Select **Save**.

Add a group permission for an architectural artifact

Group permissions refer to the access rights assigned to different user groups to create, view, or edit architectural artifacts. These permissions enable only the authorized groups to perform any actions on architectural artifacts.

Before you begin

Role required: All users with **Writer** permission assigned.

About this task

You can create group permissions and associate them with architectural artifacts. Based on your existing permission, you can provide certain user permissions.

- If you're the owner of the architectural artifact, you can provide **Reader**, **Writer**, and **Owner** group permission to other users.
- If you're assigned the **Writer** permission to an architectural artifact, you can provide **Writer** or **Reader** group permission to other users.
- If you're assigned the **Reader** permission to an architectural artifact, you can't provide any group permission to other users.

Procedure

1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Portfolio List view by selecting the Portfolio icon .
3. Select the expand row icon ( ) next to **Information Portfolio**.

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4. Select **Architectural Artifacts**.
5. Select the architectural artifact that you want to associate group permissions with.
   A new page appears and the details of the architectural artifact are displayed.
6. Select the **Group Permissions** tab.
7. Select **New**.
8. On the form, fill in the fields.
   For a description of the field values, see Create new group permissions.
9. Select **Save**.

Manage architectural artifact versions

You can create multiple versions of architectural artifacts and send for approval. There can be only one approved version for each artifact.

The status of the previous version of the architectural artifact changes to **Approved (not current)**.

View all architectural artifacts versions

You can view the list of all architectural artifacts versions in the Enterprise Architecture Workspace.

Before you begin

Role required: Depends on the role permissions set for a particular architectural artifact.

Procedure

1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Portfolio List view by selecting the Portfolio icon .
3. Select the expand row icon ( ) next to **Information Portfolio**.
4. Select **Architectural Artifact Versions**.

Manage your entities

The My entities section within the Portfolio page of the Enterprise Architecture Workspace helps you to manage all your own entities.

View your business capabilities

View the list of all your business capabilities that are created by you in the Enterprise Architecture Workspace.

Before you begin

Role required: sn_apm.apm_user

Procedure

1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Portfolio List view by selecting the Portfolio icon .
3. Select the expand row icon ( ) next to **My entities**.
4. Select **My Business Capabilities**.
   You can also view the list of capabilities from the Business Portfolio page. For more information, see Managing a business portfolio.

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Add or edit your business capabilities

Add or edit a business capability to align your organization's business goals.

Before you begin

Role required: sn_apm.apm_analyst

Procedure

1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Portfolio List view by selecting the Portfolio icon .
3. Select the expand row icon ( ) next to **My entities**.
4. Select **My Business Capabilities**.
5. Add or edit a capability.
   - To add a capability, select **New**.
   - To update details of an existing capability, select the capability, then select **Edit**.
6. On the form, fill in the fields.
   For field information, see Business Capability form.
7. Select **Save**.
   You can also add capabilities from the Business Portfolio page. For more information, see Add a business capability.

View your business processes

View the list of all business processes that are created by you in the Enterprise Architecture Workspace.

Before you begin

Role required: business_process_manager or asset or itil

Procedure

1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Portfolio List view by selecting the Portfolio icon .
3. Select the expand row icon ( ) next to **My Entities**.
4. Select **My Business Processes**.

Add or edit your business processes

Add or edit a business process to group applications that help accomplish a specific application service. A business process is a collection of related structured tasks performed to accomplish a specific application service.

Before you begin

Role required: business_process_manager or asset or itil

Procedure

1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Portfolio List view by selecting the Portfolio icon .
3. Select the expand row icon ( ) next to **My Entities**.

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4. Select **My Business Processes**.
5. Add or edit a business process.
   - To add a business process, select **New**.
   - To update details of an existing business process, select the business process, then select **Edit**.
6. On the form, fill in the fields.
   For field information, see Create business process form.
7. Select **Save**.

View your business applications

View the list of all your business applications that are created by you in the Enterprise Architecture Workspace.

Before you begin
Role required: sn_apm.apm_user

Procedure
1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Portfolio List view by selecting the Portfolio icon .
3. Select the expand row icon ( ) next to **My Entities**.
4. Select **My Business Applications**.

Add or edit your business applications

Add the applications that your organization wants to introduce based on their functions and the business process they fulfill. In Enterprise Architecture, add or edit your business applications that are used to assess and track costs, usage, business value, functional fitment, and risks.

Before you begin
Role required: sn_apm.apm_analyst

Note:
The user must be part of the Enterprise Architect Group.

About this task
If you have an Enterprise Architecture user role (sn_apm.apm_user), use the Business Application Life-cycle Management services to request, add, or retire a business application.

Procedure
1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Portfolio List view by clicking the Portfolio icon .
3. Select the expand row icon ( ) next to **My Entities**.
4. Select **My Business Applications**.
5. Add or edit a business application.
   - To add a business application, select **Add**.
   - To update the details of an existing business application, select the record and then select **Edit**.

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6. On the form, fill in the fields.

   For field information, see Business Application Form.

7. Select **Save** or **Update**.

View your application services

View the list of application services created by you in the Enterprise Architecture Workspace.

Before you begin
Role required: sn_apm.apm_user

Procedure

1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Portfolio List view by selecting the Portfolio icon .
3. Select the expand row icon ( ) next to **My Entities**.
4. Select **My Application Services**.

Add or edit your application services

Add or edit an application service created by you in the Enterprise Architecture Workspace.

Before you begin
Role required: sn_apm.apm_analyst

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Portfolio List view by clicking the Portfolio icon .
3. Select the expand row icon ( ) next to **My Entities**.
4. Select **My Application Services**.
5. Add or edit an application service.
   - To add an application service, select **Add**.
   - To update details of an existing application service, select the record then select **Edit**.
6. On the form, fill in the fields.

   For field information, see Application service form.

7. Select **Save** or **Update**.

View your information objects

View the list of information objects created by you in the Enterprise Architecture Workspace.

Before you begin
Role required: sn_apm.apm_user

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Procedure

1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Portfolio List view by selecting the Portfolio icon .
3. Select the expand row icon ( ) next to **My Entities**.
4. Select **My Information Objects**.

Add or edit your information objects

Add or edit an information object to capture the logical data for a business application.

Before you begin
Role required: admin

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Portfolio List view by selecting the Portfolio icon .
3. Select the expand row icon ( ) next to **My Entities**.
4. Select **My Information Objects**.
5. Add or edit an information object.
   - To add an information object, select **New**.
   - To update details of an existing information object, select the information object, then select **Edit**.
6. Fill in the form fields.
   For field information, see Create information object form.
7. Select **Save**.

View your architectural artifacts

View the list of all your architectural artifacts created by you in the Enterprise Architecture Workspace.

Before you begin
Role required: sn_apm.apm_user

Procedure

1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Portfolio List view by selecting the Portfolio icon .
3. Select the expand row icon ( ) next to **My Entities**.
4. Select **My Architectural Artifacts**.

Add or edit your architectural artifacts

Add or edit an architectural artifact to align it with your business requirements.

Before you begin
Role required: sn_apm.apm_user

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Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Portfolio List view by selecting the Portfolio icon .
3. Select the expand row icon ( ) next to **My Entities**.
4. Select **My Architectural Artifacts**.
5. Add or edit an architectural artifact.
   - To add an architectural artifact, select **New**.
   - To update details of an existing architectural artifact, select the architectural artifact, then select **Edit**.
6. Fill in the form fields.
   For field information, see Architectural artifact form.
7. Select **Save**.

Related topics

Add a related entity to an architectural artifact

Add a role permission for an architectural artifact

Add a user criteria permission for an architectural artifact

Add a user permission for an architectural artifact

Add a group permission for an architectural artifact

View your TRM products

View all your Technology Reference Model (TRM) products in the Enterprise Architecture Workspace. TRM allows you to define the standards for your software and hardware products and manage unapproved products in your organization.

Before you begin

Role required: admin

Procedure

1. Navigate to **Workspaces** > *Enterprise Architecture Workspace*.
2. Open the Portfolio List view by clicking the Portfolio icon .
3. Select the expand row icon ( ) next to **My Entities**.
4. Select **My** *Technology Reference Model* **Products**.

Add or edit your TRM products

Add a software product to the Technology Reference Model (TRM) library or edit an existing product details and maintain the TRM library for your organization.

Before you begin

You must be part of the Enterprise Architect Group.

Role required: sn_apm.apm_analyst

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Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Portfolio List view by selecting the portfolio icon .
3. Select the expand row icon ( ) next to **My Entities**.
4. Select *Technology Reference Model* **Products**.
5. Add or edit a TRM product.
   - To add a product, select **New**.
   - To update a product details, select a TRM product, then select **Edit**.
6. On the TRM Product form, fill in the fields.

   For field information, see Create new TRM product form.
7. Select **Save**.

View your digital integrations

View the list of all digital integrations created by you in the Enterprise Architecture Workspace.

Before you begin
Role required: sn_apm.apm_user

Procedure

1. Navigate to **Workspaces** > *Enterprise Architecture Workspace*.
2. Open the Portfolio List view by clicking the Portfolio icon .
3. Select the expand row icon ( ) next to **My Entities**.
4. Select **My Digital Integrations**.

Add or edit your digital integrations

Add a digital integration or edit an existing digital integration created by you in the EA Workspace.

Before you begin
Role required: sn_apm.apm_analyst

About this task
The digital integration is a design object used by the Enterprise Architects. It describes a connection between two business applications or between a business application and an external service (for example: AWS, Yahoo, a TimeZone Conversion service) that provides an interface (API) to interact with.

The digital integration form helps you define why a connection is required between two data entities. You can define the interface where they should communicate. You can provide a link to relevant designs and architectural material in the description. A Digital Integration underpins a business capability and provides business value.

Procedure

1. Navigate to **Workspaces** > *Enterprise Architecture Workspace*.
2. Open the Portfolio List view by selecting the Portfolio icon ( ).

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3. Select the expand row icon ( ) next to **My Entities**.
4. Select **My Digital Integrations**.
5. Add or edit a digital integration.
   - To add a digital integration, select **New** or **New (Easy form)**.
   - To update an existing digital integration, select the digital integration, select **Edit**.
6. On the **Digital Integration** form, fill in the fields.

   For a description of the field values, see Digital integration form (easy form) in EA Workspace or Digital integration form in EA Workspace.

7. Select **Add** or **Update**.

View your digital interfaces

View the list of all digital interfaces that are created by you in the Enterprise Architecture Workspace.

Before you begin
Role required: sn_apm.apm_user

Procedure
1. Navigate to **Workspaces** > *Enterprise Architecture Workspace*.
2. Open the Portfolio List view by clicking the Portfolio icon .
3. Select the expand row icon ( ) next to **My Entities**.
4. Select **My Digital Interfaces**.

Add or edit your digital interfaces

Add or edit a digital interface for an integration to describe how business applications can interact.

Before you begin
Role required: sn_apm.apm_analyst

About this task
Each business application or an application service you interact with provides a logical high-level description of how to interface with the application or service. The digital interface is an object used in the design phase to describe how other services or business applications can interact. At the same level, you can define which information objects are provided or updated by this digital interface.

Procedure
1. Navigate to **Workspaces** > **Enterprise Architecture Workspace**.
2. Open the Portfolio List view by selecting the Portfolio icon ( ).
3. Select the expand row icon ( ) next to **My Entities**.
4. Select **My Digital Interfaces**.
5. Create or update a digital interface.

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- To create an interface, select **New**.
- To update an existing interface, select a digital integration, then select **Edit**.

6. On the Digital Interface form, fill in the fields.

   For field information, see Digital interface form.

7. Select **Save**.

Configure the Enterprise Architecture Workspace

Customize your workspace to display the components that you want to see.

Before you begin

Role required: sn_apm.apm_admin and sn_apm.apm_user

About this task

For the Insights, Overview, and Health sections, you can hide some components if you don't intend to use them.

Procedure

1. Navigate to **All** > **Application Portfolio Management** > **Enterprise Architecture Workspace** > **Configuration**.
2. On the APM EA Configurations page, select an item that you want to hide or show.
3. In the Active column, select **True** or **False** to show or hide the component in the workspace.

> **Note:**
> You can create a visualization configuration using the Platform Analytics Workspace. For instructions, see Create a single score visualization in the Visualization Designer.

Create and apply a new configuration for the Overview section

Create visualization configurations for the Overview section and apply them as needed.

Before you begin

Role required: sn_apm.apm_admin

Procedure

1. Navigate to **All** > **Application Portfolio Management** > **Enterprise Architecture Workspace** > **Configuration**.
2. On the APM EA Configurations page, select **New**.
3. On the form, fill in the fields.

New EA Configuration Record form

Field	Description
Name	Name of the configuration.
Active	Option to make the configuration active to appear on the Overview section.
Section	Section name for which you're creating the configuration.

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Field	Description
Order	Position of the card in the sequential order of all other cards in that section.
Configuration Type	Type of the configuration. If the **Section** field is set to **Overview**, then this field value is automatically set to **Visualization**.
Saved Visualization	Name of the configuration. Select the lookup icon ( ) to select a configuration from the PAR Visualizations list. **Note:** You can create and save a visualization configuration using the Platform Analytics Workspace. For instructions, see Create a single score visualization in the Visualization Designer .
Manage Access	Option to provide access to the selected users and user groups. Add users or groups by selecting the lock icon ( ) for **Users** or **Groups**.

Sample Configuration script to add a card (Business applications at the same capability hierarchy level) in the Business Portfolio tab of the Insights section:

```
responseFromScript();

function responseFromScript() {

    return {

   "title":{

      "label":"Test insight card",

      "size":"sm",

      "lines":2

   },

   "count":"6",

   "description":{

      "label":"6 testing description",

      "lines":2

   },

   "countLabel":"test count",

   "buttonLabel":"View list",
```

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```
   "buttonTooltip":"View list for Business applications at the
 same capability hierarchy level",

   "border":{

      "color":"brown",

      "variant":"secondary"

   },

   "highlightedHeader":{

      "label":"Business Portfolio",

      "icon":"bag-outline"

   },

   "navigation":{

      "route":"list",

      "title":"Business applications at the same capability
 hierarchy level",

      "fields":{

         "table":"cert_follow_on_task",

         "listTitle":"Business applications at the same
 capability hierarchy level"

      },

      "params":{

         "query":"sys_created_on>=2022-12-15
 11:36:37^audit.sys_id=ae25162c3ba20300028fe79c83efc492^state=
1",

         "listView":""

      }

   },

   "displayText":"6 Business applications at the same
 capability hierarchy level"

};

}
```

4. Select **Submit**.

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Create and apply a new configuration for the Health or Insights section

Create configurations for the Health or Insights section and apply them as needed.

Before you begin

Role required: sn_apm.apm_admin

Procedure

1. Navigate to **All** > **Application Portfolio Management** > **Enterprise Architecture Workspace** > **Configuration**.
2. On the APM EA Configurations page, select **New**.
3. On the form, fill in the fields.

New EA Configuration Record form

Field	Description
Name	Name of the configuration.
Active	Option to make the configuration active to appear on the Health or Insights section.
Section	Section name for which you're creating the configuration.
Order	Position of the card in the sequential order of all other cards in that section.
Configuration Type	Type of the configuration. If the **Section** field is set to any of the following, then this field value is automatically set to **Script**. ○ Health ○ Insights - Application Portfolio ○ Insights - Business Portfolio ○ Insights - Information Portfolio ○ Insights - Technology Portfolio
Configuration Script	Script of the configuration.
Manage Access	Option to provide access to the selected users and user groups. Add users or groups by clicking the lock icon for **Users** or **Groups**.

Sample Configuration script to add a card (Business Capabilities not Assessed) in the Health section:

```
function responseFromScript(filters) {

  return {"count":74,"percentage":"45","subtext":"45% of all
 Capabilities","query":"sys_idIN016d2c3d18400300964f2ff0d21a4ee
4,016d2c3d18400300964f2ff0d21a4eeb,016d6c3d18400300964f2ff0d21a
4e00,016d6c3d18400300964f2ff0d21a4e0b,016d6c3d18400300964f2ff0d
21a4e0e,056d2c3d18400300964f2ff0d21a4ee2,056d2c3d18400300964f2f
f0d21a4ee9,056d2c3d18400300964f2ff0d21a4ef7,056d6c3d18400300964
f2ff0d21a4e13,096d2c3d18400300964f2ff0d21a4ee0,096d2c3d18400300
964f2ff0d21a4ef5,096d2c3d18400300964f2ff0d21a4efc,096d6c3d18400
300964f2ff0d21a4e03,0d6d2c3d18400300964f2ff0d21a4ee5,0d6d2c3d18
```

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```
400300964f2ff0d21a4eec,0d6d2c3d18400300964f2ff0d21a4efa,0d6d6c3
d18400300964f2ff0d21a4e08,116d6c3d18400300964f2ff0d21a4e23,156d
6c3d18400300964f2ff0d21a4e21,343ab8b1c172d700964f1c9d9204dfc4,3
df0ce8111f01300964fb19f04b5016c,3eaa906187082110cb387406dabb350
2,416d2c3d18400300964f2ff0d21a4eee,416d2c3d18400300964f2ff0d21a
4efc,416d6c3d18400300964f2ff0d21a4e03,416d6c3d18400300964f2ff0d
21a4e0a,456d2c3d18400300964f2ff0d21a4ef3,4ad8bca987482110cb3874
06dabb3548,4d6d2c3d18400300964f2ff0d21a4ef6,596d6c3d18400300964
f2ff0d21a4e22,5d6d6c3d18400300964f2ff0d21a4e19,816b418b876f1110
cb387406dabb3548,816d2c3d18400300964f2ff0d21a4eea,816d2c3d18400
300964f2ff0d21a4ef8,816d2c3d18400300964f2ff0d21a4eff,856d2c3d18
400300964f2ff0d21a4ee1,856d2c3d18400300964f2ff0d21a4ee8,856d2c3
d18400300964f2ff0d21a4ef6,896d2c3d18400300964f2ff0d21a4ee6,896d
2c3d18400300964f2ff0d21a4ef4,896d6c3d18400300964f2ff0d21a4e02,8
96d6c3d18400300964f2ff0d21a4e09,896d6c3d18400300964f2ff0d21a4e1
0,8d6d2c3d18400300964f2ff0d21a4ee4,8d6d2c3d18400300964f2ff0d21a
4eeb,8d6d2c3d18400300964f2ff0d21a4ef2,8d6d2c3d18400300964f2ff0d
21a4ef9,8d6d6c3d18400300964f2ff0d21a4e00,916d6c3d18400300964f2f
f0d21a4e22,956d6c3d18400300964f2ff0d21a4e19,a770d85187046110cb3
87406dabb3540,c16d2c3d18400300964f2ff0d21a4eed,c16d2c3d18400300
964f2ff0d21a4ef4,c16d2c3d18400300964f2ff0d21a4efb,c4c7273087442
110cb387406dabb3520,c56d2c3d18400300964f2ff0d21a4ee4,c56d2c3d18
400300964f2ff0d21a4eeb,c56d6c3d18400300964f2ff0d21a4e00,c56d6c3
d18400300964f2ff0d21a4e0e,c96d2c3d18400300964f2ff0d21a4ee2,c96d
2c3d18400300964f2ff0d21a4ee9,c96d2c3d18400300964f2ff0d21a4ef0,c
96d2c3d18400300964f2ff0d21a4efe,c96d6c3d18400300964f2ff0d21a4e0
5,c96d6c3d18400300964f2ff0d21a4e13,cd6d2c3d18400300964f2ff0d21a
4ee7,cd6d2c3d18400300964f2ff0d21a4eee,d16d6c3d18400300964f2ff0d
21a4e1e,d56d6c3d18400300964f2ff0d21a4e15,d56d6c3d18400300964f2f
f0d21a4e1c,dd026ed887d82110cb387406dabb3548,dd6d6c3d18400300964
f2ff0d21a4e18,ed4b175c87902110cb387406dabb3553,efbf3eb187bb1110
2f631f473cbb3571","table":"cmdb_ci_business_capability","listVi
ew":"business_capability_apm_view","icon":"exclamation Fill"}

}
```

Sample Configuration script to add a card in the Application Portfolio or Business Portfolio or Information Portfolio in the Insights section:

```
months - selected upto months filter

showProd - show only production filter



responseFromScript(months, showProd);



function responseFromScript(months, showProd) {



    var currentDateTime = new GlideDateTime();

    currentDateTime.addMonthsLocalTime(months);
```

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```
    var queryDate = currentDateTime.getLocalDate();

    var query =
 "technology_lifecycle.earliest_lifecycle_date<=javascript:gs.d
ateGenerate('" + queryDate + "','start')"; if (showProd) {

        query = query +
 "^business_service.used_for=Production";

    }

    var productInventoryGR = new
 GlideAggregate('sn_apm_tpm_discovered_technology');

    productInventoryGR.addEncodedQuery(query);

    productInventoryGR.addAggregate("count(distinct",
 'technology_lifecycle.hardware_model');

    productInventoryGR.setGroup(false);

    productInventoryGR.query();

    if (productInventoryGR.next()) {

        hwProductsCount =
 productInventoryGR.getAggregate("count(distinct",
 'technology_lifecycle.hardware_model');

    }

    if (hwProductsCount > 0) {

        var hpRiskDesc = gs.getMessage("by {0}", [queryDate]);

        return {

            'title': {

                'label': gs.getMessage("Hardware models with
 lifecycle risk"),

                'size': "sm",

                'lines': 2

            },

            'count': hwProductsCount,

            'description': {

                'label': hpRiskDesc,

                'lines': 2

            },
```

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```
            'countLabel': gs.getMessage("Hardware models
count"),

            'buttonLabel': gs.getMessage("View list"),

            'buttonTooltip': gs.getMessage("View list for
hardware models with lifecycle risk"),

            'border': this.cardDetails[3].border,

            'highlightedHeader': this.cardDetails[3].header,

            'navigation': {

                "route": "list",

                "title": gs.getMessage("Hardware models with
lifecycle risk"),

                "fields": {

                    "table":
"sn_apm_tpm_discovered_technology",

                    "listTitle": gs.getMessage("Hardware models
with lifecycle risk")

                },

                "params": {

                    "query": query +
"^ORDERBYtechnology_lifecycle.earliest_lifecycle_date",

                    "listView": ""

                }

            },

            'ariaLabel': {

                "aria-label": gs.getMessage("View list for
hardware models with lifecycle risk")

            }

        };

    }

    return false;

}
```

4. Click **Submit**.

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Work with the Setup page in the Enterprise Architecture Workspace

Using the Setup page in the Enterprise Architecture Workspace, as an Enterprise Architect, you can configure Enterprise Architecture (formerly Application Portfolio Management) features within the EA Workspace.

You can configure the following categories:

Information Data Domains

Data domain is a collection of information objects. Relate an information object to the database catalog of a database instance to collect the physical data. ServiceNow Discovery finds database catalog that lists all the catalog objects, or databases, discovered for an instance of a database. To create a data domain, see Add or edit an information data domain.

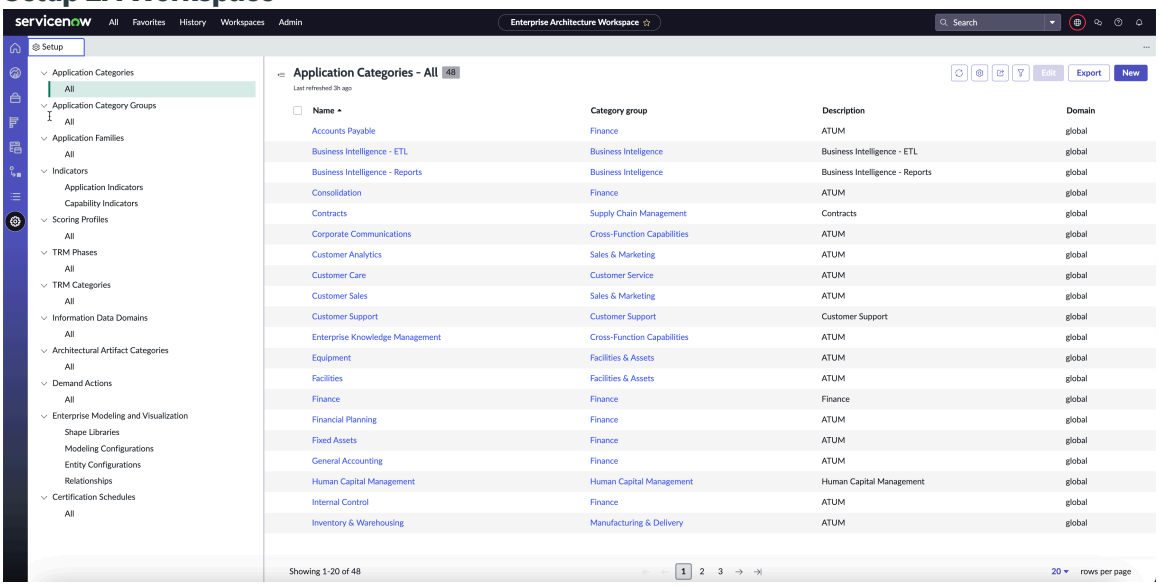
Architectural Artifact Categories

The architectural artifact categories enable you to categorize and manage artifacts more efficiently. To create an architectural artifact category, see Add or edit an architectural artifact category.

TCO

The Application total cost of ownership (TCO) feature helps you to leverage application costs to prioritize the application portfolio and align with the business strategy. For more details, see Configure application total cost of ownership (TCO) in Enterprise Architecture Workspace.

Setup EA Workspace



Configure application categories

An application category is a grouping of applications by their purpose and function, fields, or areas.

Such a categorization helps you to consolidate applications and rationalize decisions. You can create an application category or edit an existing one to align it with your business requirements.

View all application categories

You can view the list of all application categories in the Enterprise Architecture Workspace.

Before you begin
Role required: sn_apm.apm_user

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Procedure

1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Setup by selecting the Setup icon .
3. Select the expand row icon ( ) next to **Application Categories**.
4. Select **All**.

Add or edit an application category

Each application should have an application category defined. This field is used to describe the purpose of the application, and the key business function this application supports. You can keep the categorization at a high level, like a business function. For example, Sales, HR, Marketing, and Manufacturing.

Before you begin

Role required: sn_apm.apm_admin

Procedure

1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Setup by selecting the Setup icon .
3. Select the expand row icon ( ) next to **Application Categories**.
4. Select **All**.
5. Add or edit an application category.
   - To add an application category, select **New**.
   - To update details of an existing application category, select the application category.
6. On the form, fill in the fields.

   For field information, see Create new application category form.
7. Select **Save**.

Configure application category groups

An application category group is a collection of application categories. Category groups help with the filtering and reporting of the application categories.

View all application category groups

You can view the list of all application category groups in the Enterprise Architecture Workspace.

Before you begin

Role required: admin

Procedure

1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Setup page by selecting the Setup icon .
3. Select the expand row icon ( ) next to **Application Category Groups**.
4. Select **All**.

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Add or edit an application category group

Add or edit an application category group and align it with your business requirements. Category groups help with the filtering and reporting of the application categories

Before you begin
Role required: sn_apm.apm_admin

Procedure

1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Setup page by selecting the Setup icon .
3. Select the expand row icon ( ) next to **Application Category Groups**.
4. Select **All**.
5. Add or edit an application category group.
   - To add an application category group, select **New**.
   - To update details of an existing application category group, select the application category group.
6. On the form, fill in the fields.

   For field information, see Create new application category group form.
7. Select **Save**.

Configure application families

An application family is an attribute to group a set of related applications based on manufacturer classification of their products into product suites.

View all application families

You can view the list of all application families in the Enterprise Architecture Workspace.

Before you begin
Role required: sn_apm.apm_user

Procedure

1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Setup page by selecting the Setup icon .
3. Select the expand row icon ( ) next to **Application Families**.
4. Select **All**.

Add or edit an application family

Add or edit an application family and align it with your business requirements.

Before you begin
Role required: sn_apm.apm_admin

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Procedure

1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Setup page by selecting the Setup icon .
3. Select the expand row icon ( ) next to **Application Families**.
4. Select **All**.
5. Add or edit an application family.
   - To add an application family, select **New**.
   - To update details of an existing application family, select the application family.
6. On the form, fill in the fields.

   For field information, see Create new application family form.
7. Select **Save**.

Configure indicators

You can view, add, or edit application or capability indicators in the Enterprise Architecture Workspace.

Application indicators are business metrics that assess the applications across dimensions such as cost, quality, technical risk, investments, user satisfaction, and business value.

Capability indicators are used to access business capabilities within the indicator framework. Based on the indicator score, you can make strategic decisions on the business applications that support the business capabilities.

Each indicator periodically captures related application or capability data which is used to calculate the application or capability score.

View all application indicators

You can view the list of all application indicators in the Enterprise Architecture Workspace.

Before you begin

Role required: sn_apm.apm_user

Procedure

1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Setup page by selecting the Setup icon .
3. Select the expand row icon ( ) next to **Indicators**.
4. Select **Application Indicators**.

Add or edit an application indicator

Add or edit an application indicator to assess the application across dimensions such as cost, quality, technical risk, investments, user satisfaction, and business value.

Before you begin

Role required: sn_apm.apm_admin

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About this task

Each indicator periodically captures related application data, which is used to calculate the application score. The assessment of applications is done on an extensible framework, which is based on the various configured indicators. If you require indicators other than the preconfigured ones to calculate the application score, then you can create an indicator based on your business requirements.

Procedure

1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Setup page by selecting the Setup icon .
3. Select the expand row icon ( ) next to **Indicators**.
4. Select **Application Indicators**.
5. Add or edit an application indicator.
   - To add an application indicator, select **New**.
   - To update details of an existing application indicator, select the application indicator.
6. On the form, fill in the fields.

   For field information, see Create new indicator form.
7. Select **Save**.

View all capability indicators

You can view the list of all capability indicators in the Enterprise Architecture Workspace

Before you begin

Role required: sn_apm.apm_user

Procedure

1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Setup page by selecting the Setup icon .
3. Select the expand row icon ( ) next to **Indicators**.
4. Select **Capability Indicators**.

Add or edit a capability indicator

Add or edit a capability indicator to access business capabilities within the indicator framework.

Before you begin

Role required: sn_apm.apm_admin

Procedure

1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Setup page by selecting the Setup icon .
3. Select the expand row icon ( ) next to **Indicators**.
4. Select **Capability Indicators**.
5. Add or edit an capability indicator.

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- To add an capability indicator, select **New**.
- To update details of an existing capability indicator, select the capability indicator.

6. On the form, fill in the fields.

   For field information, see Create new indicator form.

7. Select **Save**.

Activate or turn off an application indicator

Enable or disable application indicators according to your business requirements.

Before you begin

Role required: sn_apm.apm_admin

Procedure

1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Setup page by selecting the Setup icon.
3. Select the expand row icon ( ) next to **Indicators**.
4. Select **Application Indicators** or **Capability Indicators**.
5. Double-click the Active column value for a particular indicator.
6. Select the relevant state for that indicator.
   Available options:
   - **true**: This state denotes that the indicator is calculated and used in the overall score calculation by fiscal period.
   - **false**: This state denotes that the indicator is turned off and isn't used to calculate the overall application score by fiscal period.
7. Select **OK**.

Regenerate application indicator scores on-demand in Enterprise Architecture Workspace

You can update application indicator scores on-demand, to assess the application across various dimensions such as cost, quality, technical risk, business value, to gather real-time insights into the performance of applications and take immediate action, if necessary.

Before you begin

Role required: sn_apm.apm_admin

About this task

On-demand generation of indicator scores makes sure that the assessment reflects the most recent state of the application and is useful when immediate feedback on application performance is required.

Procedure

1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Setup page by selecting the Setup icon.
3. Select the expand row icon ( ) next to **Indicators**.
4. Select **Application Indicators**.

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5. Select the application indicator that you want to generate the indicator score for.
6. Select **Regenerate indicator score**.
   The **Regenerate application indicator scores** pop-up window appears.
7. In the **Fiscal Period** box, enter the fiscal period that you want to generate the indicator score for.

   You can also select the lookup using list icon to view the list of available fiscal periods.
8. Select **OK**.
   This action doesn't update the existing application indicator scores but deletes them and generates new scores.

Regenerate capability indicator scores on-demand in Enterprise Architecture Workspace

You can update capability indicator scores on-demand, to gather real-time insights into the performance of business capabilities and take immediate action, if necessary.

Before you begin
Role required: sn_apm.apm_admin

About this task
Assessing business capabilities within the indicator framework and based on the scores helps you to make strategic decisions on the business applications that support the business capability.

Procedure
1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Setup page by selecting the Setup icon .
3. Select the expand row icon ( ) next to **Indicators**.
4. Select **Capability Indicators**.
5. Select the capability indicator that you want to generate the indicator score for.
6. Select **Regenerate indicator score**.
   The **Regenerate application indicator scores** pop-up window appears.
7. In the **Fiscal Period** box, enter the fiscal period that you want to generate the indicator score for.

   You can also select the lookup using list icon to view the list of available fiscal periods.
8. Select **OK**.
   This action doesn't update the existing capability indicator scores but deletes them and generates new scores.

Configure scoring profiles

Scoring profiles help you to evaluate the applications based on various indicators.

View all scoring profiles

You can view the list of all scoring profiles in the Enterprise Architecture Workspace.

Before you begin
Role required: sn_apm.apm_user

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Procedure

1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Setup page by selecting the Setup icon .
3. Select the expand row icon ( ) next to **Scoring Profiles**.
4. Select **All**.

Add or edit a scoring profile

You can add or edit a scoring profile with new indicators and associate it with the business application. You can also use the same indicators within many scoring profiles, which generate indicator scores unique to that scoring profile. After you create a scoring profile, you have to associate it with indicators.

Before you begin

Role required: sn_apm.apm_admin

About this task

You can create or update the scoring profile with new indicators and associate it with the business application. You can also use the same indicators within many scoring profiles, which generate indicator scores unique to that scoring profile.

Procedure

1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Setup page by selecting the Setup icon .
3. Select the expand row icon ( ) next to **Scoring Profiles**.
4. Select **All**.
5. Add or edit a scoring profile.
   - To add a scoring profile, select **New**.
   - To update details of an existing scoring profile, select the scoring profile.
6. On the form, fill in the fields.

   For field information, see Create new scoring profile form.
7. Select **Save**.

Attach a profile indicator with an application scoring profile

You must associate scoring profiles with profile indicators.

Before you begin

Role required: sn_apm.apm_admin

About this task

You can create or update the scoring profile with new indicators and associate it with the business application. You can also use the same indicators within many scoring profiles, which generate indicator scores unique to that scoring profile.

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Procedure

1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Setup page by selecting the Setup icon .
3. Select the expand row icon ( ) next to **Scoring Profiles**.
4. Select **All**.
5. Select the scoring profile that you want to associate with a profile indicator.
6. Associate an application indicator on the **Profile Indicators** tab by selecting **New**.
7. On the form, fill in the fields.
   For a description of the field values, see Create new profile indicator form.
8. Select **Save**.

Configure TRM phases

A Technology Reference Model (TRM) phase refers to a specific stage in the lifecycle of an application within the organization's TRM framework.

A TRM phase represents the status of the application, that is whether the application is approved for use, being evaluated or being scheduled for divestment.

View all TRM phases

You can view the list of all Technology Reference Model (TRM) phases in the Enterprise Architecture Workspace.

Before you begin

Role required: sn_apm.apm_user

Procedure

1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Setup page by selecting the Setup icon .
3. Select the expand row icon ( ) next to *TRM* **Phases**.
4. Select **All**.

Add or edit a TRM phase

Define your own TRM phase for the TRM products.

Before you begin

You must be part of the Enterprise Architect Group.

Role required: sn_apm.apm_analyst

About this task

The color and shape of a phase are used to represent the phase of the TRM product.

Procedure

1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Setup page by selecting the Setup icon .
3. Select the expand row icon ( ) next to *TRM* **Phases**.

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4. Select **All**.

   The following TRM phases are available from the base system:

   - **Approved**: The technology is approved for use.
   - **Approved with Constraints**: The technology can be used within the specified constraints specified in the comments.
   - **Divest**: A decision was taken to divest from the use of the technology.
   - **Evaluation**: This technology is being evaluated and can't be used to production purposes.
   - **Unapproved**: The technology isn't permitted to be used.

5. Add or edit a TRM phase.
   - To add a TRM phase, select **New**.
   - To update details of an existing TRM phase, select the TRM phase.
6. On the form, fill in the fields.
   For field information, see TRM Phase form.
7. Select **Save**.

Configure TRM categories

A Technology Reference Model (TRM) category refers to a grouping of TRM software products by their purpose and function. The categorization helps you to consolidate TRM products and rationalize decisions.

View all TRM categories

You can view the list of all Technology Reference Model (TRM) categories in the Enterprise Architecture Workspace.

Before you begin

Role required: sn_apm.apm_user

Procedure

1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Setup page by selecting the Setup icon .
3. Select the expand row icon ( ) next to *TRM* **Categories**.
4. Select **All**.

Add or edit a TRM category

Add or edit a TRM category to group the TRM software products.

Before you begin

You must be part of the Enterprise Architect Group.

Role required: sn_apm.apm_analyst

About this task

A TRM category is a grouping of TRM software products by their purpose and function. The categorization helps you to consolidate TRM products and rationalize decisions. You can create a TRM category or edit an existing one to align it with your business requirements. You can define categories or rely on the Software Asset Management product classification.

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Procedure

1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Setup page by selecting the Setup icon .
3. Select the expand row icon ( ) next to *TRM* **Categories**.
4. Select **All**.
5. Add or edit a TRM category.
   - To add a TRM category, select **New**.
   - To update details of an existing TRM category, select the TRM category.
6. On the form, fill in the fields.
   For field information, see TRM Category form.
7. Select **Save**.

Configure information data domains

A data domain is a collection of information objects. ServiceNow® Discovery finds the database catalog that lists all the catalog objects, or databases, discovered for an instance of a database.

View information data domains

View the list of all data domains configured in the Enterprise Architecture Workspace.

Before you begin
Role required: admin

Procedure

1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Setup page by selecting the Setup icon ( ).
3. Select the expand row icon ( ) next to **Information Data Domains**.
4. Select **All**.

Add or edit an information data domain

Relate an information object to the database catalog of a database instance to collect the physical data.

Before you begin
Role required: sn_apm.apm_admin

About this task
A data domain is a collection of information objects. ServiceNow® Discovery finds the database catalog that lists all the catalog objects, or databases, discovered for an instance of a database.

Procedure

1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Setup page by selecting the Setup icon ( ).
3. Select the expand row icon ( ) next to **Information Data Domains**.
4. Select **All**.

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5. Add or edit a data domain.
   - To add a data domain, select **New**.
   - To update details of an existing data domain, select a domain, then select **Edit**.
6. On the form, fill in the fields.
   For field information, see Data Domain form.
7. Select **Save**.

Configure architectural artifact categories

The architectural artifact categories enable you to categorize and manage artifacts more efficiently.

View all architectural artifact categories

View the list of all architectural artifact categories in the Enterprise Architecture Workspace.

Before you begin

Role required: admin

Procedure

1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Setup page by selecting the Setup icon ( ).
3. Select the expand row icon ( ) next to **Architectural Artifact Categories**.
4. Select **All**.

Add or edit an architectural artifact category

Add#or edit an artifact category. Assign the category to an architectural artifact. Categories enable you to categorize and manage artifacts more efficiently.

Before you begin

Role required: sn_apm.apm_admin

Procedure

1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Setup page by selecting the Setup icon ( ).
3. Select the expand row icon ( ) next to **Architectural Artifacts Categories**.
4. Select **All**.
5. Add or edit an architectural artifact category.
   - To add an architectural artifact category, select **New**.
   - To update details of an existing artifact category, select an action, then select **Edit**.
6. On the form, fill in the fields.
   For field information, see Architectural category form.
7. Select **Save**.

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Configure demand actions

Demand actions are strategic decisions that you want to execute for an application. Enterprise Architecture Workspace provides preconfigured actions that help you enhance the capability of the applications. You can add new demand actions as per your requirements.

View all demand-actions

View all preconfigured demand actions in the Enterprise Architecture Workspace that help you enhance the capability of the applications.

Before you begin

Role required: admin

Procedure

1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Setup page by selecting the Setup icon ( ).
3. Select the expand row icon ( ) next to **Demand Actions**.
4. Select **All**.

Add or edit a demand action

Add or edit a demand action that help you enhance the capability of the applications in the Enterprise Architecture Workspace.

Before you begin

Role required: admin

Procedure

1. Navigate to **Workspace** > *Enterprise Architecture Workspace*.
2. Open the Setup page by selecting the Setup icon ( ).
3. Select the expand row icon ( ) next to **Demand Actions**.
4. Select **All**.
5. Add or edit a demand action.
   - To add a demand action, select **New**.
   - To update details of an existing demand action, select an action, then select **Edit**.
6. On the form, fill in the fields.
   For field information, see Demand Actions Form.
7. Select **Save**.

Configure Enterprise Modeling and Visualization

You can configure the shape libraries, modeling options, entities, and relationships used in the Enterprise Modeling and Visualization.

View all shape libraries

View all shape libraries available for the Enterprise Modeling and Visualization in the Enterprise Architecture Workspace.

Before you begin

Role required: sn_apm_mdtl_com.mdtl_com_user

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Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace** > **Setup**.
2. Open the Setup page by selecting the Setup icon ( ).
3. Select the expand row icon ( ) next to *Enterprise Modeling and Visualization*.
4. Select **Shape Libraries**.

Add or edit a shape library

Create a shape library or edit an existing library to add new shapes and create diagrams using the shapes.

Before you begin
Role required: sn_apm_mdtl_com.mdtl_com_admin

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace** > **Setup**.
2. Open the Setup page by selecting the Setup icon ( ).
3. Select the expand row icon ( ) next to *Enterprise Modeling and Visualization*.
4. Select **Shape Libraries**.
5. Create or update a shape library.
   - To create a shape library, select **New**.
   - To update an existing shape library, select a library, then select **Edit**.
6. On the Shape Library form, fill in the fields.

   For field information, see Shape library form.
7. Select **Save**.

View configuration for Enterprise Architecture Workspace

View all the configuration details of Enterprise Architecture Workspace.

Before you begin
Role required: sn_apm_mdtl_com.mdtl_com_user

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace** > **Setup**.
2. Open the Setup page by selecting the Setup icon ( ).
3. Select the expand row icon ( ) next to *Enterprise Modeling and Visualization*.
4. Select **Modeling Configurations**.

Edit a modeling configuration

As an administrator, you can edit an existing configuration details for modeling. You can also make the configuration active or inactive.

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Before you begin
Role required: sn_apm_mdtl_com.mdtl_com_admin

Procedure
1. Navigate to **Workspaces** > **Enterprise Architecture Workspace** > **Setup**.
2. Open the Setup page by selecting the Setup icon ( ).
3. Select the expand row icon ( ) next to *Enterprise Modeling and Visualization*.
4. Select **Modeling Configurations**.
5. Select a configuration, then select **Edit**.
6. On the Shape Library form, fill in the fields.

   For field information, see Modeling configuration form.
7. Select **Save**.

View all entities

View all entities available for the Enterprise Modeling and Visualization in the Enterprise Architecture Workspace.

Before you begin
Role required: sn_apm_mdtl_com.mdtl_com_user

Procedure
1. Navigate to **Workspaces** > **Enterprise Architecture Workspace** > **Setup**.
2. Open the Setup page by selecting the Setup icon ( ).
3. Select the expand row icon ( ) next to *Enterprise Modeling and Visualization*.
4. Select **Entity Configurations**.

Add or edit an entity

Add an entity or edit an existing entity details that are included in the Enterprise Modeling and Visualization diagram.

Before you begin
Role required: sn_apm_mdtl_com.mdtl_com_admin

Procedure
1. Navigate to **Workspaces** > **Enterprise Architecture Workspace** > **Setup**.
2. Open the Setup page by selecting the Setup icon ( ).
3. Select the expand row icon ( ) next to *Enterprise Modeling and Visualization*.
4. Select **Entity Configurations**.
5. Create or update an entity.

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- To create an entity, select **New**.
- To update an existing entity, select an entity, then select **Edit**.

6. On the Shape Library form, fill in the fields.

   For field information, see Entity configuration form.

7. Select **Save**.

Add or update shape icon for an entity

Add a shape icon to an entity or edit an existing one to use them in creating Enterprise Modeling and Visualization diagram.

Before you begin

Role required: sn_apm_mdtl_com.mdtl_com_admin

Ensure the shape icon is added or uploaded to the 'db_image.list'.

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace** > **Setup**.
2. Open the Setup page by selecting the Setup icon ( ).
3. Select the expand row icon ( ) next to *Enterprise Modeling and Visualization*.
4. Select **Entity Configurations**.
5. Open an existing entity.
   The Entity Configuration page opens for the selected entity.
6. Select the info icon against the **Diagram Action** field.
7. Select **Switch scope**.
   The record opens in edit mode.
8. Enter name of the icon in the **Icon** field.
   The icon is fetched from the db_image.list and updated in the Enterprise Architecture Workspace.
9. Select **Save**.

View relationships configurations

View all relationship configurations available for the Enterprise Modeling and Visualization in the Enterprise Architecture Workspace.

Before you begin

Role required: sn_apm_mdtl_com.mdtl_com_user

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace** > **Setup**.
2. Open the Setup page by selecting the Setup icon ( ).
3. Select the expand row icon ( ) next to *Enterprise Modeling and Visualization*.
4. Select **Relationships**.

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Add or edit a relationship

Add or edit a relationship configuration details available for the Enterprise Modeling and Visualization in the Enterprise Architecture Workspace.

Before you begin

Role required: sn_apm_mdtl_com.mdtl_com_admin

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace** > **Setup**.
2. Open the Setup page by selecting the Setup icon ( ).
3. Select the expand row icon ( ) next to *Enterprise Modeling and Visualization*.
4. Select **Relationships**.
5. Create or update a relationship.
   - To create a relationship, select **New**.
   - To update an existing relationship, select an relationship, then select **Edit**.
6. On the Relationship form, fill in the fields.

   For field information, see Relationship configuration form.

Configure certification schedules

You can configure certification schedules to keep your business applications inventory up to date. Keeping your business application data current helps you to assess your business applications precisely as there are indicators that are dependent on these business applications.

View all certification schedules

View the list of all certification schedules and manage them in the Enterprise Architecture Workspace.

Before you begin

Role required: certification

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace** > **Setup**.
2. Open the Setup page by selecting the Setup icon ( ).
3. Select the expand row icon ( ) next to **Certification Schedules**.
4. Select **All**.

Add or edit a certification schedule

Add or edit a certification schedule in the Enterprise Architecture Workspace.

Before you begin

Role required: certification_admin

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Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace** > **Setup**.
2. Open the Setup page by selecting the Setup icon ( ).
3. Select the expand row icon ( ) next to **Certification Schedules**.
4. Select **All**.
5. Create or update a certification schedule.
   - To create a certification schedule, select **New**.
   - To update an existing certification schedule, select a certification schedule, then select **Edit**.
6. On the Certification Schedule form, fill in the fields.

   For field information, see Certification schedule form in Enterprise Architecture Workspace.
7. Select **Save**.

Configure application total cost of ownership (TCO) in Enterprise Architecture Workspace

You can configure the application TCO source and cost type.

Application TCO source

The application TCO source helps you to categorize and analyze the costs associated with business applications, over a fiscal period, enabling you to optimise your application portfolio.

Application TCO cost type

The application TCO cost type refers to the categorization of business application costs. There are mainly two types of costs:

- Capital expenditure (Capex): The expenditure incurred by you to onboard, upgrade, or maintain a business application.
- Operating expenditure (Opex): The expenditure incurred by you to use a business application on a day-to-day basis.

The application TCO cost type helps you to evaluate and manage the capital and operating expenditures associated with your business application.

Related topics

Manage application total cost of ownership (TCO)

Install the Application Total Cost of Ownership (TCO) plugin

Add or edit a total cost of ownership record

Create a source for an Application TCO

Create a source for an Application Total Cost of Ownership (TCO). Specify the source of cost being ingested in Enterprise Architecture Workspace.

Before you begin

Role required: admin

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Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace** > **Setup**.
2. Select **TCO**.
3. Select **Sources**.
4. Select **New**.
5. Enter a name for the source.
6. Select **Save**.

Create a TCO source cost type

Create a source cost type for the TCO source. Specify the type of cost being ingested in Enterprise Architecture Workspace.

Before you begin
Role required: admin

About this task
After a source is created for the TCO, you can create a source cost type from the related list.

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace** > **Setup**.
2. Select **TCO**.
3. Select **Sources**.
4. Select a source to open it.
5. Select the **TCO Source Cost Types** tab.
6. Select **New**.
7. Enter a name and domain for the source cost type.
   The **Source** is field is auto populated with a source name.
8. Select **Save**.

Create a cost type for Application TCO in Enterprise Architecture Workspace

Create a cost type as capital expense (Capex) or operating expense (Opex) for Application TCO. Specify the type of cost being ingested in Enterprise Architecture Workspace.

Before you begin
Role required: admin

Procedure

1. Navigate to **Workspaces** > **Enterprise Architecture Workspace** > **Setup**.
2. Select **TCO**.
3. Select **Cost types**.
4. Select **New**.
5. Enter a name and select the expense type (Capex or Opex).
6. Select **Save**.

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Set the duration of a fiscal period property for TCO dashboards

Set the system property (*com.glide.fiscal_calendar.fiscal.unit*) to view TCO dashboards for a specific duration of the fiscal period in the Dashboard page of the Enterprise Architecture Workspace.

Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **System Properties** > **All Properties**.
2. Search and open the *com.glide.fiscal_calendar.fiscal.unit* property.
3. Update the **Value** field according to your requirement.
   You can update the value to Quarter or Month or Week.
4. Select#**Update**.

   The Portfolio TCO dashboard page shows the data according to the specified duration of the fiscal period. For more details, see Working with the Enterprise Architecture Workspace dashboard.

View TPM logs

Track the progress of Technology Portfolio Management (TPM) analysis by examining the TPM Discovered Technology Run Logs [sn_apm_tpm_discovered_technology_run_log] table. Each time the analysis is run, an entry is added to this table.

Before you begin
Role required: sn_apm.apm_user

Procedure

1. Navigate to **Workspaces** > *Enterprise Architecture Workspace*.
2. Open the Setup page by selecting the Setup icon .
3. Select the expand row icon ( ) next to **Logs**.
4. Select **TPM Logs**.

Enterprise Architecture Workspace reference

Reference topics that provide additional details about Enterprise Architecture Workspace such as the field descriptions, user roles, tables, guidelines, and domain separation information.

Create diagram form for a business application

[store-future: BEGIN review]An Enterprise architect can create a diagram using a diagramming tool for a business application hierarchy and associate it with an architectural artifact.[End]

Create Diagram form fields

Field	Description
Diagram Name	Name of the diagram.
Diagram Type	Type of the diagram. It can be either of the following:

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Field	Description
	• Business Application Hierarchy • Business Capability Map This field is auto-populated when creating the diagram from a business application or business capability view.
Diagramming Tool	The tool that you use to create the diagram. [store-future: BEGIN review] • Enterprise Modeling and Visualization • Lucidchart [End]This field is automatically set to **Lucidchart**.
Diagram Name	Name of the diagram. **Note:** This field appears only when you select Lucidchart in the Diagramming tool field.
Link to Artifact	Artifact to which you want to associate the diagram. Use the following options: • **None**: Select to view the diagram but not associate with any artifact. • **New Artifact**: Select to create an artifact and associate the diagram. • **Existing Artifact**: Select to associate the diagram to an existing artifact.
Artifact Name	Name of the artifact. This field appears only when **New Artifact** or **Existing Artifact** is selected from the **Link to Artifact** field.
Diagram Type	Type of the diagram. It can be either of the following: • Business Application Hierarchy • Business Capability Map This field is auto-populated when creating the diagram from a business application or business capability view.
Business Application	Name of the Business Application for which you are creating the diagram. This field is auto-populated when creating the diagram from a business application view.

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Field	Description
Entities	Entities that are included in the chart. Select the following to include in the diagram: • Application Service: Server (Hardware Model or Software Product) • Business Capability • Demand • Digital Integration • Digital Interface • Information Object • Project **Note:** The Project option is available when the PPM Standard plugin installed.
Folder	Name of the Lucid folder. Select the folder where you want to save the diagram. When you select a folder, its sub folders are displayed. [store-future: BEGIN review]**Note:** This field appears only when you select Lucidchart in the Diagramming tool field. [End]

Related topics

Create a diagram for a business application in the EA Workspace

Create diagram for a business capability

An Enterprise architect can create a diagram using Lucidchart for a business capability maps and associate it with an architectural artifact.

Create diagram form fields

Field	Description
Diagram Name	Name of the diagram.
Diagram Type	Type of the diagram. It can be either of the following: • Business Application Hierarchy • Business Capability Map This field is auto-populated when creating the diagram from a business application or business capability view.

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Field	Description
Include Business Applications	Option to include business applications.
All Business Capabilities	Option to include all business capabilities maps in the diagram.
Business Capabilities	List of business capabilities for which you want to create the diagram. You can search and add multiple capabilities. **Note:** If you have selected the check box for **All Business Capabilities** in the previous step, then this field does not appear.
Diagramming Tool	The tool using which you are creating the diagram. This field is automatically set to **Lucidchart**.
Link to Artifact	Artifact to which you want to associate the diagram. Use the following options: • **None**: Select to view the diagram but not associate with any artifact. • **New Artifact**: Select to create an artifact and associate the diagram. • **Existing Artifact**: Select to associate the diagram to an existing artifact.
Artifact Name	Name of the artifact. This field appears only when **New Artifact** or **Existing Artifact** is selected from the **Link to Artifact** field.
Folder	Name of the Lucid folder. Select the folder where you want to save the diagram. When you select a folder, its sub folders are displayed.

Related topics

Create a Lucidchart diagram for a business capability in the EA Workspace

Create new TRM product request form

Create a new request to include a new software product to the TRM library. An email notification is sent to the approver for approval. The approver belongs to the Enterprise Architect group.

TRM Product Request form fields

Field	Description
Number	A unique, auto-generated identification number for the product request.

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Field	Description
Publisher	Publisher of the software product. Look up and select a publisher from the Companies page.
Is New Product	Option to specify if it is a new product.
Requested TRM Phase	Phase of the product. Use the following choice list: Eliminated: Invest: Maintain • Approved • Approved with Constraints • Divest • Evaluation • Unapproved
Category	Category of the product. Look up and select a category from the TRM Categories page.
Software product	Name of the software.
Short Description	Description about the product request.
Business Justification	Business justification for the product request.

Related topics

Request a TRM product

Create new TRM product form

As an Enterprise Architect, you can add a new software product to the TRM library. It creates the record directly without sending a request for approval.

TRM Product form fields

Field	Description
Publisher	Publisher of the software product. Look up and select a publisher from the Companies page.
Category	Category of the product. Look up and select a category from the TRM Categories page.
Name	Name of the TRM product.
TRM Phase	Phase of the product. Use the following choice list: • Approved • Approved with Constraints • Divest • Evaluation • Unapproved
Investment direction	Purpose for the investment. Use the following choice list:

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Field	Description
	• Divest • Eliminated • Invest • Maintain
Business Justification	Business justification for the product request.

Related topics

Add a TRM product in Enterprise Architecture Workspace

Create new TRM product lifecycle form

Add a new lifecycle for a TRM product. It creates the record directly without sending a request for approval.

TRM Product Lifecycle form fields

Field	Description
TRM Product	Name of the TRM product. Look up and select the product from the TRM Products page.
Version	Version of the TRM product.
Edition	Edition of the TRM product. Either Standard or Enterprise.
TRM Phase	Phase of the product. Look up and select a phase from the TRM Phases page.
Phase start date	Start date of the product lifecycle phase.
Phase end date	End date for the product lifecycle phase.
Description	Description about the product lifecycle request.

Related topics

Add a TRM product in Enterprise Architecture Workspace

Create new TRM product lifecycle request form

Add a new request to create a lifecycle for a TRM product. An email notification is sent to the approver for approval. The approver belongs to the Enterprise Architect group.

TRM Product Lifecycle Request form fields

Field	Description
Number	A unique, auto-generated identification number for the product lifecycle request.
TRM Product	Name of the TRM product. Look up and select the product from the TRM Product page.

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Field	Description
Approval	The approval status of the TRM product lifecycle.
Requested TRM Phase	Phase of the product. Look up and select a phase from the TRM Phases as defined in the Setup page (Enterprise Architecture Workspace > Setup > TRM Phases).
Phase start date	Start date of the product lifecycle phase.
Phase end date	End date for the product lifecycle phase.
Business Application	Name of the business application. Look up and select a business application from the Business Applications page to associate it to the TRM product lifecycle.
Short Description	Description about the product lifecycle request.
Business Justification	Business justification for the product lifecycle request. It helps the approver to better understand the request.

Related topics

Add a TRM product lifecycle

TRM technical debt form

The Technology Reference Model (TRM) technical debts that are created for the products that aren't aligned with the TRM phases and standards.

Technical Debt form fields

Column name	Description
TRM product	Name of the TRM product. A software product that is having version-specific life cycles.
Business Application	Name of the business application associated with the TRM product.
Server	Name of the server related to the TRM product. **Note:** This field is available from Technology Portfolio Management (TPM) plugin version 1.7.1.
Software product model	Name of the software product model related to the TRM product.
Software product	Name of the software product related to the TRM product.
Operating system	The operating system on which the TRM product can be deployed. This field appears on when **Software** is selected in the **Type** field.
TRM phase	Phase of the TRM product. The following TRM phases are available from the base system:

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Technical Debt form fields (continued)

Column name	Description
	• Approved: The technology is approved for use. • Approved with Constraints: The technology can be used within the specified constraints specified in the comments. • Divest: A decision was taken to divest from the use of the technology. • Evaluation: This technology is being evaluated and can't be used to production purposes. • Unapproved: The technology isn't permitted to be used. **Note:** You can modify these phases from the **EA Workspace** > **Setup** > **TRM Phases**
TRM level	The level (Product or Product Lifecycle) at which the technical debt is created.
Version	Version of the software product. Usually, the name of the Software product model contains this version.
Reason	The reason to explain why the technical debt was created.
Last run	Shows the timestamp when the custom scheduled job *`Populate TRM technical debts in the EA Workspace`* is run to update the table with technical debt.

Related topics

View TRM technical debts

Manage TRM technical debt

Technology portfolio audit form

You can use the Technology portfolio audit table to view audit information for your applications.

Technology portfolio audit table

Column name	Description
Type	Application type. Choices are: • Software • Hardware
Software product	Name of the software product.
Product version	Version number of the product.
Product edition	Edition of the product. For example, Standard.
Product full version	Full version of the product.
Product model	Hardware model that is associated with the software product.

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Technology portfolio audit table (continued)

Column name	Description
Verification status	Verification status of the product. Choices are: • Need to verify • Verified • Rejected
Comments	Customer comments.
Lifecycle phase	Lifecycle phase of the product.
Phase start date	Lifecycle phase start date.
Version	Version of the lifecycle.
Edition	Edition of the lifecycle.
Full version	Full version of the lifecycle.
Match notes	Notes by the customer.
Technology lifecycle	TPM technology lifecycle information of the software product or hardware model.

Related topics

Working with technology portfolio audit details

New Indicator form

Application indicators are business metrics that assess the applications across dimensions such as cost, quality, technical risk, investments, user satisfaction, and business value.

Indicator form fields

Field	Description
Name	Name of the application indicator.
Category	Category that the indicator is associated with.
Short description	Short summary of the application indicator.
Direction	Business application with maximum or minimum values. Select Minimize if lower values are better. Select Maximize if higher values are better.
Result limit	The maximum number of records an indicator displays when running an associated script. This enables better performance of Enterprise Architecture by not processing too many records.
Unit	A number, currency, time, duration in minutes, hours, days, month, or quarter, or rate.

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Field	Description
	You can also create units as per your requirements.
Automatic refresh interval	The refresh interval to update the indicator scores within the defined time range.
Order	The position of the indicator in the sequential order of all other indicators while accessing an application or capability.
Frequency	Frequency determines the interval at which the data for the indicator source should be collected. The **Frequency** field is not available when **Performance Analytics** is selected from the **Data source** list.
Target maximum	Maximum value for the indicator. The **Target maximum** field is not available when **Assessments** is selected from the **Data source** list.
Active	Select the **Active** option to enable the indicator.
CI Class	CI type for which the score is generated.
Target minimum	Minimum value for the indicator. The **Target minimum** field is not available when **Assessments** is selected from the **Data source** list.
Consider Absolute Values	Option to consider values from the **Target maximum** and **Target minimum** fields. This field is available only when values are entered in the **Target maximum** and **Target minimum** fields. When the check box is cleared, values for target maximum and target minimum are considered based on the intelligent logic.

Datasource Configuration section form fields

Field	Description
Data source	Defines the location from which the indicator receives data. • **Performance Analytics**: Collects scores from indicators created in Performance Analytics. See Performance Analytics indicators.

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Datasource Configuration section form fields (continued)

Field	Description
	• **Custom Script**: Allows you to write a script that collects data from another application. Beneath the **Data Source** field, a sample script appears. Customize the script as needed. • **Query Condition**: Allows you to select a table to run filters on to obtain data. • **Assessments**: Allows you to evaluate, score, and rank records by assessing records in a table. See Create metric types and generate assessable records. To view results of survey assessments within APM, see Generate survey assessments and view results within APM. • **Indicators**: Allows you to add dependent child indicators. Through the child indicators, data is gathered to the parent indicator. For example, if the parent indicator is number of issues, the dependent indicators can be number of incident counts, number of problems, and changes. These dependent indicators are child indicators and the number of incidents, problems, and changes recorded are consolidated up to the parent indicator as the number of issues.
Indicator	The **Indicator** field appears when **Performance Analytics** is selected from the **Data source** list. Indicators are statistics that are used to measure current conditions and forecast trends. **Note:** If the collection frequency of the application indicator is not greater than the frequency at which the data of the Performance Analytic indicator are generated, then the system displays an error message: `Frequency of the indicator must always be greater than or equal to the frequency of the datasource configuration indicator`. For more information, see Collection of PA indicator score data.

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Datasource Configuration section form fields (continued)

Field	Description
Default breakdown	Name of the Performance Analytics breakdown.
Normalization script	A script to evaluate and score business applications and capabilities using standardized metrics. It involves using indicators that provide a normalized score for the condition they are evaluating. These indicators can be based on assessments, query conditions, custom scripts, or performance analytics.
Consolidation	Computational method for aggregating the values, a function such as sum, average, maximum, or minimum. Default is Average. For example, Average is the sum of the monthly values divided by the total number of months in a quarter. If you select Maximum or Minimum, then it is the maximum value or the minimum value of a month in the quarter, respectively. If you select Sum, then it is an aggregate of all monthly values in the quarter.
Assessment Metric Type	Type of metric that is used to assess the indicator. **Assessment Metric Type** field appears when the **Data source** is **Assessments**.
Assessment Metric Category	Category of the metric.

Click Through section form fields

Field	Description
Click through URL navigation type	Select whether to view the application or capability indicator details in a new window, in the same window, or in a dialog box.
Click through URL script	The script associated with an indicator that allows users to select a URL and view the indicator data in a related application or dashboard. This enables quick access to relevant information, or actions related to the indicator data.

Related topics

Add or edit an application indicator

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Create new profile indicator form

You can use indicators within many scoring profiles, which generate indicator scores unique to that scoring profile.

Create new profile indicator form fields

Field	Description
Profile	Name of the application scoring profile.
Used in CI score calculation	Option for using the application indicator in calculating the application score.
Evaluate With In Scoring Profile Applications	Option for considering the business applications tied to the selected scoring profile in the evaluation of scores. Clearing the check box entails evaluation of all business applications within the enterprise or across all scoring profiles.
Indicator	Name of the application indicator.
Domain	The domain to which this indicator belongs.
Weightage	Numeral value for the indicator. The weight provided in the application score profile for an indicator contributes to the total score of the application. All indicator weight within a scoring profile must add up to 100.

Create a sub-capability form

Create a sub-capability and add it to the capability hierarchy map.

Create sub-capability form fields

Field	Description
Name	Name of the sub-capability.
Description	A short description of the sub-capability.
Parent	Name of the parent capability for the sub-capability that you're creating.

Related topics

Create a sub-capability

Create information object form

An information object captures the logical data for the business application.

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Information Object form fields

Field	Description
Name	Name of the information object.
Data classification	Category of data. Displays the classification tags applied on the information object.
Owned by	User who owns the information object.
Business Unit	Business unit that owns the information object.
Department	Department in the business unit that actually owns the information.
Description	Short description of the information object.

Related topics

Create information object

Business Capability form

Business Capability is a common table used within the Application Portfolio Management application.

Business Capability form fields

Field	Description
Name	Name of the business capability.
Parent	Name of the parent capability for the capability that you're creating.
Level	Level at which the capability is in the hierarchy. This field is auto-populated and can't be edited.
Business Unit	Name of the business unit in the organizational structure.
Order	Position of the capability in the sequential order of all other business capabilities in that capability hierarchy.
Department	Name of the department in the organizational structure.
Owned by	User who owns the business capability.
Leaf Node	Option to select if the capability doesn't have a child capability.
Hierarchy ID	Hierarchy ID of the capability. This field is auto-populated based on the order.
Description	A short description of the business capability.

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Related topics

Add or edit a business capability from the Portfolio page

Digital integration form (easy form) in EA Workspace

The digital integration represents the integration between two business applications.

Digital integration form (easy form) fields

Field	Description
Subscriber Business Application	Name of the business application that uses the provided interface to consume, exchange, or ingest data to support a business capability. Therefore it's affected by the changes or an outage face connection or data loss. **Note:** Being a provider or subscriber business application, it doesn't refer to the data flow direction (incoming, outgoing, bidirectional). It's managed by the Data Flow Direction attribute.
Subscriber Digital Interface	Name of the digital interface that subscribes for the integration.
Provider Business Application	Name of the business application that provides the digital interface and enables to consume or ingest data. Changes, ownership, and responsibilities of the interface are often connected to the provider. **Note:** Being a provider or subscriber business application, it doesn't refer to the data flow direction (incoming, outgoing, bidirectional). It's managed by the Data Flow Direction attribute.
New Provider Digital Interface	Option to create a digital interface. This field is a placeholder digital interface that is related to a provider business application.
Provider Digital Interface	Name of the digital interface. As a digital integration between two business applications or services uses a digital interface (API), you must select an interface related to the provider business application or service.
IT Owner	The owner within the IT organization who owns the digital integration. It can be the same person who owns the parent subscriber business application.
Business Owner	The owner of the business function who owns the digital integration. It can be the

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Field	Description
	same person who owns the parent subscriber business application.
Digital Integration Name	Name of the digital integration. This field is auto-populated when the **Subscriber Business Application**, **Provider Business Application**, and the **Digital Interface** fields are selected. You can modify the auto-populated name.
Type	Type of the integration. Use the following options: • **Data Integration**: Use this option when the integration must mainly focus on the exchange of data such as users, groups, locations, configuration items, and departments. • **Process Integration**: Use this option when the integration is about an interaction of transactional data to support a specific process. • **User Interface Integration**: Use this option when the integration opens a connection with another application and sends app data via a URL to query the application.
Subtype	Subtype of the integration. This field appears only when **Data Integration** is selected from the **Type** field. Use the following options: • Process configuration • Foundation data • Configuration items • Events • Reporting • Syslog
Trigger	How to trigger the integration. Use the following options: • Manual • Scheduled • Process Driven • Event
Interval	Frequency to trigger the integration. Options for the interval are as follows:

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Field	Description
	• Seconds • Minutes • Hours • Days • Weeks • Months • Quarters • Years • On Demand • Real Time.
Description	Description about the digital integration. Describe in detail why the integration is being created between two business applications or between an external service provided interface and a business application and what business value it adds.

Additional fields appear after the digital integration is created. For details on the additional fields, see Digital integration form in EA Workspace.

Related topics

Add or edit a digital integration in the EA Workspace

Digital integration form in EA Workspace

Use the digital integration form to update the digital integration between two business applications.

Digital Integration form

Field	Description
Name	Unique and meaningful name of the digital integration.
Number	Number of the digital integration. This field is automatically generated with the DINTG prefix and can't be edited.
Provider Digital Interface	Name of the digital interface. Because a digital integration between two business applications or services uses a digital interface (API), you must select an interface related to the provider business application or service. This field is automatically generated and can't be edited.
Provider Business Application	Name of the business application that provides the digital interface and enables to consume or ingest data. Changes, ownership, and responsibilities of the interface are often connected to the provider.

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Digital Integration form (continued)

Field	Description
	Note: Being a provider or subscriber business application doesn't refer to the data flow direction (incoming, outgoing, bidirectional). The data flow direction is managed by the Data Flow Direction attribute. This field is automatically generated and can't be edited.
Subscriber Digital Interface	Name of the digital interface that subscribes for the integration.
Subscriber Business Application	Name of the business application that uses the provided interface to consume, exchange, or ingest data to support a business capability. The subscriber business application is affected by the changes or an outage face connection or data loss. **Note:** Being a provider or subscriber business application doesn't refer to the data flow direction (incoming, outgoing, bidirectional). The data flow direction is managed by the Data Flow Direction attribute.
Subscriber company	Reference to the (external) company subscribing to this integration.
Type	Type of the integration. Use the following options: • **Data Integration**: Use this option when the integration must mainly focus on the exchange of data such as users, groups, locations, configuration items, and departments. • **Process Integration**: Use this option when the integration is about an interaction of transactional data to support a specific process. • **User interface Integration**: Use this option when the integration opens a connection with another application and sends app data via a URL to query the application.
Subtype	Subtype of the integration.

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Digital Integration form (continued)

Field	Description
	This field appears only when **Data Integration** is selected from the **Type** field. Use the following options: • Process configuration • Foundation data • Configuration items • Events • Reporting • Sys log
Version	Version of the integration. You can apply a practice of designing, planning, and managing changes to an Integration. You can describe the different changes and capabilities according to version in the **Description** field. This field helps Application Owners and Architects to look up which version of an integration is in use. This also helps to decide whether to change the life cycle.
Life Cycle Stage	Life cycle stage of the integration. Helps to track the life cycles for products, assets, contracts, CIs, locations, and other objects. Using the standard CSDM life-cycle values helps you to track objects through their transitions over time. Reporting can therefore accurately reflect the actual states of CIs: usage, availability, end of support, and so on.
Life Cycle Stage Status	Life cycle stage status of the integration. The state transition of a Digital Integration guides you through the different stages of its life cycle. A life-cycle state is the combination life-cycle stage and life-cycle status of a Digital Integration during the life cycle.
Business Unit	Name of the business unit that the integration belongs to.
Description	Description of the digital integration. Describe in detail why the integration is being created between two business applications or between an external service provided interface and a business application and what business value it adds.

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Functional section fields

Field	Description
Data flow direction	Direction of the data flow in the integration. Use the following options: • **Outgoing: Provider to Subscriber**: Data flow from the Provider business application to the Subscriber business application. • **Incoming: Subscriber to Provider**: Data flow from the Subscriber business application to the Provider business application. • **Bidirectional: Flow of data in both directions**: Data flows in both the directions between the Provider and Subscriber business applications.
Initiating application	Name of the application, which initiates the data flow. It can be a Provider or a Subscriber business application.
Trigger	How to trigger the integration. Use the following options: • Manual • Scheduled • Process Driven • Event
Interval	Frequency to trigger the integration. Options for the interval are as follows: • Seconds • Minutes • Hours • Days • Weeks • Months • Quarters • Years • On Demand • Real Time.
Response	Type of the response received by the subscriber. Use the following options: • Synchronous • Asynchronous

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Functional section fields (continued)

Field	Description
Interaction type	Type of the interaction between the provider business application and the subscriber business application. Use the following options: • Guaranteed Message • Pub-Sub • Pull • Push
Middleware	Name of the middleware used in the integration.

Business Impact section fields

Field	Description
Criticality	Level of the business impact criticality. Use the following options: • Low • Medium • High • Critical
Confidentiality	Confidentiality level of the integration. Use the following options: • Low • Medium • High • Critical
Integrity	Integrity level of the integration. Use the following options: • Low • Medium • High • Critical
Availability	Availability of the integration. Use the following options: • Low • Medium

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Business Impact section fields (continued)

Field	Description
	• High • Critical

Owners section fields

Field	Description
Business owner	The owner of the business function who owns the digital integration. It can be the same person who owns the parent subscriber business application.
IT owner	The owner within the IT organization who owns the digital integration. It can be the same person who owns the parent subscriber business application.
Supported by	Name of the Subject Matter Expert (SME) or individual who provides support to the digital interface.
Support group	Name of the group that provides support to the digital interface.

Activities section fields

Field	Description
Work notes	Comments about the integration.

Create demand form

Use a demand as a step to identify cost-saving opportunities on the business applications and meet your targets.

Create demand form

Field	Description
Action	The course of action for the new demand. **Note:** The **Action** field is available only when you launch the form within the Application Portfolio Management module when the Application Portfolio Management(APM) plugin is activated.
Name	Name of the demand.
Due date	Requested completion date of the demand.

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Create demand form (continued)

Field	Description
Number	A unique, auto-generated identification number for the demand.
Start date	Start date of the demand.

Details section form fields

Field	Description
Business capabilities	One or more business capabilities to associate the demand with.
Business applications	Business applications that you add to the demand. You can select any business application in your enterprise, irrespective of it being related or not related to the capability that you've selected in the **Business capabilities** field.

Related topics

- Create a demand using the bubble chart
- Create a demand using the list view

Business application form

Using the business application form, you can add any business application to assess and track its costs, usage, business value, functional fitment, and risks.

Business application form

Field	Description
Name	Name of the business application.
Number	A unique, auto-generated identification number with a configurable prefix for the business application record.
Business process	Business process that the application is used for.
Application type	Type of application. This field indicates whether the application is custom or commercial. • **Homegrown**: The application is built in-house. • **End-user computing (EUC)**: The application is used by end users to perform their daily tasks.

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Business application form (continued)

Field	Description
	• **Commercial off-the-shelf (COTS)**: The application is a commercial application purchased from another company. • **SaaS**: The application is a cloud application managed by a third-party vendor.
Publisher	Name of the application publisher.
Architecture type	Type of application architecture. • **Client Server**: Application structure that divides tasks between the service providers and service requesters. • **N-Tier**: A multi-layered architecture where presentation, processing, and data management exist as physically separate layers. • **Web-based**: Applications that are accessed over a network connection. • **Other**: Any other type of architecture. • **Platform Host**: Hardware or software that hosts the business application. • **Platform Application**: Application that runs on a platform and can be associated to a host. In this case, the business application relies on the platform for standard operations such as development tools, execution services, and data services.
Platform host	A hardware or software that hosts the business application. This field is required if you select the **Platform Application** value in the **Architecture type** field.
Install type	Type of install. Use the following options: • **On Premise** • **Cloud** • **Hybrid** • **Third Party Hosted**
Platform	Applications hosted by platform.
Business unit	Business unit that is associated with the selected business application.

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Business application form (continued)

Field	Description
Department	Department that is associated with the selected business application.
Installed	Date and time when the application was installed.
Status	Operational status of the application. Use the following options: • **Implementing** • **In Production** • **Pilot** • **Retired** • **Under Evaluation** Auditing is enabled for this field. Thus, whenever you update the value in this field, the **Activities** field on the **Activities** tab displays the update.
Life cycle stage	Life-cycle stage of the application. This field is auto-populated based on the value selected in the **Status** field. The data is fetched from the life-cycle mapping [life_cycle_mapping] table.
Application scoring profile	The profile used to calculate the application score for strategy.
Application category	The application purpose and function. Use this information to rationalize or consolidate applications.
Application family	A set of related applications that have a common platform or vendor.
Technology stack	Technology stack on which the application was built.
User base	Number of users that are using the applications. Auditing is enabled for this field. Thus, whenever you update the record in this field, the **Activities** field on the **Activities** tab displays the update.
Active user count	Number of active users out of the overall user base. Auditing is enabled for this field.
Last change applied date	Date on which the application was last updated. Auditing is enabled for this field.

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Business application form (continued)

Field	Description
Accessibility level	Accessibility level of the business application. Use the following options: • **A (lowest)** • **AA (mid-range)** • **AAA (highest)**
Age in months	Age of the business application, in months. This field is auto-populated when the date and time are entered in the **Installed** field.
Description	Unique description of the application.
Model ID	Product model ID of the business application.

Contract section form fields

Field	Description
Vendor	Vendor details of the application.
Support vendor	Vendor who currently supports the application.
Contract end date	Expiry date of the subscription contract or the support contract. Auditing is enabled for the field.

Planned disposition section form fields

Field	Description
Planned disposition	Planned disposition of a business application. Use the following options: • **Invest** • **Sustain** • **Migrate** • **Retire**
Reasoning	Reason for the planned disposition decision.

Owners section form fields

Field	Description
Business owner	Person who owns the application from the business side. Every application should have an assigned business owner.

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Owners section form fields (continued)

Field	Description
Managed by	User managing the business application.
Managed by group	User group managing the business application.
IT application owner	Person who owns the application from the IT side. The business application must have an owner assigned to it.
Last updated by	Person who last updated the application record.
Supported by	User supporting the business application.
Support group	User group supporting the business application.

Compliance section form fields

Field	Description
Business criticality	Determines how critical the application is to the business. Auditing is enabled for this field.
Emergency tier	Actions or plans executed for the application in an emergency situation.
Data classification	Security level for the data in the application. This attribute determines which Governance, Risk, and Compliance (GRC) policies are applicable to the application. Use the following options: • **Confidential** • **Highly Sensitive** • **Internal** • **Public** Auditing is enabled for the field.
Certified	Status of the application that meets your requirements or complies with the policies of your organization.

Activities section form fields

Field	Description
Work notes	Work notes entered by you.

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Related topics

Edit business application details

Application model life-cycle details form

The application model life cycle helps you to better manage the life cycle of a business application.

Application model life-cycle details form

Field	Description
Model	Model ID of the business application. This field is auto-populated from the **Model ID** field value of the Business application form.
Lifecycle type	Type of the life cycle. The available options are: • **Internal** • **Publisher**
Lifecycle phase	The phase of the life cycle. The available options are: • **General Availability** • **End of Sale** • **End of Support** • **End of Extended Support** • **End of Life**
Source	Source of the life cycle. This field is auto-generated from the Business application form.
Description	Short description of the application life cycle.
Phase start date	Start date of the business application life-cycle phase.
Phase end date	End date for the business application life-cycle phase.
Risk	Risk associated with the application life cycle. The available options are: • **Very High** • **High** • **Moderate** • **Low** • **None**
Active	Option to activate the life cycle.

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Related topics

Add business application lifecycle data using the bubble chart

Add business application lifecycle data using the list view

Business Application Form

APM helps system admins add any business application to assess and track its costs, usage, business value, functional fitment, and risks.

Business Application Form fields

Field	Description
Name	Name of the business application.
Number	Unique, auto-generated identification number with a configurable prefix for the business application record.
Business process	Business process for which the application is used.
Portfolio	Name of the portfolio to which the application belongs. This field appears when you activate the PPM Standard (com.snc.financial_planning_pmo) plugin.
Application type	Type of application. This field indicates whether the application is custom or commercial. • **Homegrown**: Application that is built in-house. • **Commercial off-the-shelf (COTS)**: Application is a commercial application purchased from another company. • **SaaS**: Application is a cloud application managed by third-party vendor.
Publisher	Name of the application publisher.
Architecture type	Type of application architecture. • **Client Server**: Application structure that divides tasks between the service providers and service requesters. • **N-Tier**: A multi-layered architecture where presentation, processing, and data management exist as physically separate layers. • **Web-based**: Applications accessed over a network connection. • **Other**: Any other type of architecture. • **Platform Host**: Hardware or software that hosts the business application. • **Platform Application**: Application that runs on a platform and can be associated to a host. In this case, the business application relies on the platform for standard operations such as development tools, execution services, and data services.
Platform Host	A hardware or software that hosts the business application.

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Field	Description
	This field is required if you select the **Platform Application** value in **Architecture type** field.
Install type	Type of install. Use the following options: • On Premise • Cloud • Hybrid • Third Party Hosted
Platform	Applications hosted by platform.
Business Unit	Business unit that is associated with the selected business application.
Department	Department that is associated with the selected business application.
Installed	Date and time when the application was installed.
Status	Operational status of the application. Use the following options: • Implementing • In Production • Pilot • Retired Auditing is enabled. Thus, whenever a user updates the value in this field, the **Activities** field in the **Activities** tab displays the update.
Life-Cycle Stage	Life-cycle stage of the application. This field is auto-populated based on the value selected in the **Status** field. The data is fetched from the life-cycle mapping [life_cycle_mapping] table.
Life-Cycle Stage Status	Status of the life-cycle stage of the application. This field is auto-populated based on the value selected in the **Status** field. The data is fetched from the life-cycle mapping [life_cycle_mapping] table.
Application scoring profile	The profile used to calculate the application score for strategy.
Application category	The application purpose and function. Use this information to rationalize or consolidate applications.
Application family	A set of related applications that have a common platform or vendor.
Technology stack	Technology stack on which the application was built.
User base	Number of users using the applications. Auditing is enabled. Thus, whenever a user updates the record in this field, the **Activities** field in the **Activities** tab displays the update.

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Field	Description
Active user count	Number of active users out of the overall user base. Auditing is enabled for the field.
Last change applied date	Date on which the application was last updated. Auditing is enabled for the field.
Accessibility level	Accessibility level of the business application. Use the following options: • A (lowest) • AA (mid-range) • AAA (highest)
Age in months	Age of the business application in months. This field is auto-populated when the date and time is entered in the **Installed** field.
Monitor	Select the check box to track the status and performance of the business application.
Description	Unique description of the application.
Model ID	Product model ID of the business application.

Contract section form fields

Field	Description
Vendor	Vendor details of the application.
Support vendor	Vendor who currently supports the application.
Contract end date	Expiry date of the subscription contract or the support contract. Auditing is enabled for the field.

Planned Disposition section form fields

Field	Description
Planned Disposition	Planned disposition of a business application. Use the following options: • Invest • Sustain • Migrate • Retire
Migration Strategy	Migration strategy for the business application. This field appears only when **Migrate** is selected from the **Planned Disposition** field. Use the following options: • Rehost • Replatform

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Planned Disposition section form fields (continued)

Field	Description
	• Repurchase • Refactor
Target Business Application	Name of the business application for which you're adding the planned disposition. This field appears only when **Migrate** is selected from the **Planned Disposition** field.
Reasoning	Reason for the planned disposition decision.

Owners section form fields

Field	Description
Portfolio manager	Owner of the portfolio, typically from IT. This field appears when you activate the PPM Standard plugin (com.snc.financial_planning_pmo).
Business owner	Person who owns the application from the business side. Every application should have an assigned business owner.
Managed by	User managing the business application.
Managed by group	User group managing the business application.
IT Application owner	Person who owns the application from the IT side. The business application must have an owner assigned to it. If you're designated as the IT Application owner, then you can view all the applications for which you're the owner in the **My Applications** menu.
Last updated by	Person who last updated the application record.
Supported by	User supporting the business application.
Support group	User group supporting the business application.

Compliance section form fields

Field	Description
Business criticality	How critical the application is to the business. Auditing is enabled for the field.

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Compliance section form fields (continued)

Field	Description
Emergency tier	Actions or plans executed for the application in an emergency situation.
Data classification	Security level for the data in the application. This attribute determines which Governance, Risk, and Compliance (GRC) policies are applicable to the application. Auditing is enabled for the field.
Certified	Status of the application that it meets requirements or complies with the policies of your organization.

Activities section form fields

Field	Description
Work notes	Work notes entered by you.

Related topics

Add a business application

Demand form

Use a demand as a step to identify cost-saving opportunities on the business applications and meet your targets.

Demand form

Field	Description
Action	The course of action of the new demand.
Name	Name of the demand.
Category	Category of the demand. Use the following: • **Strategic** • **Operational**
Type	Type of demand. Use the following: • **Project** • **No Conversion**
Number	A unique, auto-generated identification number for the demand.
Start date	Start date of the demand.
Due date	Requested completion date of the demand.

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Details section form fields

Field	Description
Portfolio	Portfolio indicating the business focus of the demand.
Program	Name of the program that the demand belongs to.
Demand manager	Name of the demand manager.
Collaborators	Users who can edit or contribute to the demand. A demand requester can select any user as a collaborator.
Department	Department in a business unit that the demand submitter belongs to. **Note:** If you don't select a department, the value defaults to the name of the department that the submitter belongs to.
Business Unit	Business unit that the demand submitter belongs to.
Impacted Business Units	The business unit that is impacted due to the submitted demand.
Business Capabilities	One or more business capabilities to associate the demand with.
Business Applications	One or more business applications to associate the demand with. You can select any business application in your enterprise, irrespective of it being related or not related to the capability that you've selected in the **Business Capabilities** field.

Related topics

Edit a demand associated with a business application

Edit a project form

Use application rationalization to edit details of an existing project associated with a business application.

Edit a project form

Field	Description
Project Name	The name assigned to the project.
Number	Unique identification number for the demand.

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Field	Description
Schedule	Schedule associated with the project.
Portfolio	Portfolio that the project belongs to.
Program	Program that the project is associated with.
Calculation	The type of calculation methodology associated with the project. Use the following: • **Automatic** • **Manual**
Planned duration	Expected duration of the project in days and hours.
State	State of the project. Use the following: • **Pending** • **Open** • **Work in Progress** • **Closed Complete** • **Closed Incomplete** • **Closed Skipped**
Project manager	Name of the project manager.
Description	Short description of the project.
Business Applications	One or more business applications to associate the project with. You can select any business application in your enterprise, irrespective of it being related or not related to the capability that you've selected in the **Business Capabilities** field.
Business Capabilities	One or more business capabilities to associate the project with.

Related topics

Edit a project associated with a business application

Digital interface form

Digital interfaces are provided as part of a business application, but they can also stand on their own. Interfaces provide a way for other business applications to interact with the applications.

Digital interface form fields

Field	Description
Name	Unique and meaningful name of the digital interface.

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Field	Description
Number	Number of the digital interface. This field is automatically generated with the DINTF prefix and can't be edited.
Provider Business Application	Name of the provider business application that provides, manager, and owns the interface. **Note:** This attribute can be empty if there is no business application in your repository. If you are using open interfaces such as Weather or Financial Service, you are only aware of the interface and track it without a related business application.
Interface Type	Type of API used by the interface. This field helps to track whether the API is Public or Open. **Note:** For Public or Open APIs, there won't be any Provider Business Application unless the Organization exposes it as an open interface. Use the following options: • Open API • Partner API • Internal API Public or Open APIs are available to anyone and can be used without any restrictions or license agreements. Internal or Private APIs are available to authorized (technical) users only and can be used without any usage restrictions and regulations. Partner APIs are available to authorized partners of an API provider. Usually, these APIs have special terms and conditions for usage.
Parent	Name of the parent interface. Often, interfaces are bundled or part of a composition. Because you can reference a digital interface on the digital integration, use the parent interface. The digital interfaces related to the parent interface are listed in the related list of the interface.

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Field	Description
Version	Version of the interface. This field helps you to track which digital integrations are using which version of an interface.
Life Cycle Stage	Life cycle stage of the interface. Use the following options: • Ideation • Design • Deploy • Operational • End of Life
Life Cycle Stage Status	Life cycle stage status of the interface. Each of the main life cycle stages can have one or more life cycle stage statuses. For example, a digital Interface in the operational stage might change status over time from In Use to In Maintenance to Pending Retirement. Use the following options: • Ideation: Under Evaluation, Pilot • Design: Chartered, Design, Build • Deploy: Test • Operational: In Use, In Maintenance, Pending Retirement • End of Life: Retired, Obsolete
Model ID	Model ID of the interface. This field helps you to track the interface model. This is a reference to the Application Model table where you can manage your own variants of API models or types. For example, Table API, Attachment API, Aggregate API, and Process APIs. This optional field can be used to track the interface model. Depending on your use case, you can add new models and model categories.
Description	Description of the digital interface. Provide the high-level design aspects of the interface. You can provide the details such as how the digital interface adds value, how it should be designed, and how it's intended to be used. You can also describe different changes and capabilities according to version of the interface. It helps the Application owners and

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Field	Description
	Architects to decide which interface version they want to use.

Owners section form fields

Field	Description
Business Owner	The owner of the business function, who owns the digital interface. It can be the same person who owns the parent business application.
IT Owner	The owner within the IT organization, who owns the digital interface. It can be the same person who owns the parent business application.
Supported By	Name of the Subject matter Expert (SME) or individual who provides support to the digital interface.
Support Group	Name of the group that provides support to the digital interface.

Functional section form fields

Field	Description
Protocol	Type of protocol used by the interface. API Protocols are the specifications that regulate the application. These protocols are used to integrate application programming interfaces with their software. Choices include REST, SOAP, LDAP, and so on. **Note:** This list is a non-exhaustive list and can be extended by adding your preferred values or hide the provided values.
Message Format	Format of the message in the interface. Choices include JSON, XML, CSV, and so on. **Note:** This list is a non-exhaustive list and can be extended by adding your preferred values or hide the provided values.

Authentication section form fields

Field	Description
Authentication Type	Type of authentication used to authenticate the interface.

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Authentication section form fields (continued)

Field	Description
	Use the following options: • Basic Auth • OpenID Connect • Certificate • WS-Security • LDAP • None • Other You can use the system-provided authentication types or add yours.
Authorization Type	Type of authorization used to authorize the interface. Use the following options: • OAuth 2.0 Token • JWT Web Token • SAML 2.0 Token • Other • No authorization You can use the system-provided authentication types or add yours.

Activities section form fields

Field	Description
Work notes	Comments about the interface.

Related topics

Add or edit a digital interface in the EA Workspace

Digital interface to API form

The relationship between a digital interface and an application service API helps analysts to view which digital interface is using which API.

Digital interface to API form fields

Field	Description
Number	Number of the digital interface API. This field is automatically generated and can't be edited.

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Field	Description
	The number starts with the prefix DINTFAPI. For example: DINTFAPI0001234.
Digital Interface	Name of the digital interface. This field is auto-populated with the name of the interface that you're editing. If you want to create the relationship to a different digital interface, use the Lookup icon to select a digital interface.
API	Name of the CMDB API. Select an API that you want to associate with the digital interface. You can also select the child class of the API (cmdb_ci_api). For example, Managed API (cmdb_ci_managed_api).
Description	Description about the connection between the digital interface and the API.

Related topics

Connect a digital interface with the CMDB API in the EA Workspace

Create business process form

A business process to group applications that help accomplish an application service.

Business Process form fields

Field	Description
Name	Unique name for the business process.
Parent	Parent business process **Note:** If the parent process exists, it creates a hierarchy of business processes.
Review frequency	Frequency for reviewing the business process.
Description	Short description of the business process.

Ownership section form fields

Field	Description
Managed By Group	Group that maintains the business process.
Approval group	Group that reviews and approves the business process.
Owned by	User responsible for the business process. This user is a member of the **Managed by Group**.

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Business Impact section form fields

Field	Description
Business criticality declared	Criticality of the business process based on your subjective assessment. The available options are: • **1- most critical** • **2- somewhat critical** • **3- less critical** • **4- not critical**
Impact to confidentiality	Risk rating for the risk of loss of confidentiality. Confidentiality loss leads to leakage of confidential information. The available options are: • **High** • **Medium** • **Low**
Impact to availability	Risk rating for the risk of loss of availability. Unavailability of the system may cause delays in decision making, business interruptions, loss of revenue, and customer dissatisfaction. The available options are: • **High** • **Medium** • **Low**
Business critically determined	Computed criticality of the business process based on the assessment of the sub-processes. The available options are: • **1- most critical** • **2- somewhat critical** • **3- less critical** • **4- not critical**
Impact to integrity	Risk rating for the risk of impact to integrity. Impact to integrity has consequences for businesses and employees, including fines and damage to your brand, reputation, and people. The available options are: • **1- High** • **2- Medium** • **3- Low**

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Related topics

Add or edit a business process

Application service form

An application service is a set of interconnected applications and hosts which are configured to offer a service to the organization. Application services can be internal, like an organization email system or customer-facing, like an organization website.

Application service form fields

Key Attributes section form fields

Field	Description
Name	Name of the application service.
Location	Set the location for the application service.
Short Description	Unique description of the application service.
Created	This is field is non-editable field.
Created by	This is field is non-editable field.
Updated	This is field is non-editable field.
Updated by	This is field is non-editable field.
Support group	Name of the user group who supports the application service.
Supported by	Name of the user who supports the application service.
Managed by	Name of the user who manages the application service.
Managed by group	Name of the user group who manages the application service.
Environment	Name of the environment such as Development, Production or Test.
Company	Name of the company.
Manufacturer	Name of the manufacturer.
Model ID	Model ID associated with the service.
Model number	Number of the Model.
Category	This field is auto-populaged as Business Service.
Sub-category	This field is auto-populaged as Service.
Department	Name of the department.

Discovery Attributes section form fields

Field	Description
Discovery source	Discovery source of the application service.
First discovered	Select the first discovered date.
Most recent discovery	Select the most recent discovery date.
Correlation ID	Enter the co-relation ID.

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Discovery Attributes section form fields (continued)

Field	Description
Skip sync	Option to select to skip the sync. This is a read-only field.

Operational Attributes section form fields

Field	Description
Life Cycle Stage	Select the life cycle stage of the application service.
Life Cycle Stage Status	Select the status of the lifecycle stage.
Attested by	Name of the user who attested.
Attested Date	Date when the attestation is done.
Attestation Status	Select the attestation status as Attested or Rejected.
Install Status	Reason for the planned disposition decision.
Operational status	Select the operational state of the application service.
Fault count	Number of the fault count.
Maintenance schedule	Name of the maintenance schedule.
Schedule	Select the schedule for maintenance.
Requires verification	Option to select to request verification. This is a read-only field.

More Attributes section form fields

Field	Description
Fully qualified domain name	Fully qualified domain name of the application service.
IP Address	Enter IP the address.
MAC Address	Enter the MAC address.
Serial number	Enter the serial number.
DNS Domain	Enter DNS domain.
Attributes	Enter attributes names.
Comments	Add comments.
Monitor	Option to select monitor.
Can Print	Option to print the details.

Related topics

Add or edit an application service in the Enterprise Architecture Workspace

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New total cost of ownership form

Application TCO helps enterprise architects to evaluate the cost of business applications and prioritize application portfolio.

Total cost of ownership form

Field	Description
Business application	Name of the business application for which you are creating the total cost of ownership.
Cost type	Cost type used in the TCO calculation.
Cost	Select the currency type and enter the cost of the business application.
Fiscal period	Select the fiscal period to calculate the total cost of ownership.
Billing date	Select a date for the billing.
Reference	Enter reference details.
Vendor	Select the vendor of the business application.
Source	Select the source of the TCO.
Source cost type	Select the cost type as defined in the source of the TCO. This field is editable only when a source is selected in the **Source** field.
Short description	Description of the TCO.

Create a new business unit form

Create a business unit to define your organizational functions.

Create new business unit form fields

Field	Description
Name	Name of the business unit.
Company	The company, if any, related with this business unit.
Business unit head	The person who heads the business unit.
Description	A description of the business unit.
Parent	Refers to another business unit. The **Parent** field makes the business unit a hierarchy element.

Related topics

- Manage business units
- Add or edit a business unit

Create new department form

Create a business unit to define your organizational functions.

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Create new department form fields

Field	Description
Name	Name of the department.
ID	A unique identification number of the department
Department head	The person who heads the department.
Primary contact	The person who is the primary point of contact for anything associated with the department.
Description	A description of the department

Related topics

Manage departments

Add or edit a department

Create new user form

Create a user to add to a department.

Create new user form fields

Field	Description
User ID	Unique identification number of the user.
First name	First name of the user.
Last name	Last name of the user.
Title	Title or job description of the user.
Department	Name of the department to which the user is being assigned to.
Password	Assign a password to the user. This password can be permanent or temporary.
Email	Email address of the user.
Language	The language to be used while displaying the user's system.
Notification	Specify if email notifications should be sent to this user. • Select **Enable** if an email notification should be sent to this user. • Select **Disable** if no email notification should be sent to the user.
Calendar integration	Select **Outlook** to have this user receive meeting notifications via email directly to the calendar. Otherwise, select **None**.
Time zone	Time zone in which the user is located.

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Create new user form fields (continued)

Field	Description
Date format	Option to choose how the date details are displayed. For example, mm/dd/yyyy.
Business phone	Business phone number of the user.
Mobile phone	Personal phone number of the user.
Password needs reset	Select this checkbox to require the user to change the password during the first login.
Locked out	Select this checkbox to lock the user out of the instance and terminate all their active sessions.
Active	Select this checkbox to make this user active
Web service access only	Select this checkbox to designate this user as a non-interactive user.
Internal integration user	Select this checkbox to designate this user as a service account.
Photo	Attach a photo of the user, if appropriate.

Related topics

Manage departments

Add a user to a department

Create new goal form

Use the Goal form to create goals for your organizational strategic priorities.

Create new goal form fields

Field	Description
Name	Name of the goal.
Parent goal	Name of the parent goal that this goal contributes to.
Start date	Start date for the goal. By default, the start date of the current quarter is populated.
Owner	Owner of the goal. By default, the name of the user creating the goal is populated.
Status	Status of the goal. The available options are: • **Red**: Indicates that the goal needs immediate attention. • **Yellow**: Indicates that the target needs improvement. • **Green**: Indicates that the target is on track. • **None**

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Create new goal form fields (continued)

Field	Description
Impact on parent goal	A numerical value that represents the importance of this goal relative to sibling goals or other goals under its parent goal. By default, the value is (1) Neutral. The available options are: • **(0) No impact** • **(1) Neutral** • **(2) Moderate** • **(3) High** • **(4) Very high** • **(5) Maximum** **Note:** This field is available only when the *sn_gf.weighted_average_enabled* system property is set to **Yes**.
Assigned entity type	Entity type to which the goal is assigned. For example, Business Unit or Department.
State	State of the goal. The available options are: • **Draft** • **In Progress** • **Approved** • **Complete** • **Pending** • **Achieved** • **Not Achieved**
Strategic priority	Name of the strategic priority that this goal is created for.
End date	End date for the goal. By default, the end date of the current quarter is populated.
Category	Category of the goal. The available options are: • **Total Applications** • **Total Cost** • **Opex Capex** • **Cloud Applications**

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Create new goal form fields (continued)

Field	Description
	• **Homegrown Applications** • **Support Cost Labor Cost**
Contributors	Users who contribute to the achievement of the goal.
Progress	Percentage complete for the goal. The progress value is calculated automatically if the goal has subgoals or/and targets.
Assigned entity	Entity to which the goal is assigned.
Comments	Detailed comments for the goal to facilitate collaboration.

Related topics

- Manage goals
- Add or edit a goal
- Create a sub-goal

Create new target form

Use the Create new target form to create a quantitative or qualitative target for your goal.

Create new target form fields

Field	Description
Name	Name of the target.
Goal	Goal that this target tracks.
Description	Description of the target.
State	The state of the target. The available options are: • **Draft** • **In Progress** • **Approved** • **Complete** • **Pending** • **Achieved** • **Not Achieved**
Progress	Percentage of target that is complete. This value is calculated automatically.

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Create new target form fields (continued)

Field	Description

	If the **Type** field is set to **Maximize**, then the progress value is calculated using the following formula.
	`Progress = (Actual value - Base value) / (Target value - Base value) x 100`
	If the **Type** field is set to **Minimize**, then the progress value is calculated using the following formula.
	`Progress = (Actual value - Target value) / (Base value - Target value) x 100`

Status	Status to indicate the target progress. The available options are: • **Green**: Indicates that the target is on track. • **Yellow**: Indicates that the target needs improvement. • **Red**: Indicates that the target needs immediate attention.
Impact on goal	A numerical value that represents the importance of this target to its parent goal. By default, the value is **(1) Neutral**. The available options are: • **(0) No impact** • **(1) Neutral** • **(2) Moderate** • **(3) High** • **(4) Very high** • **(5) Maximum** **Note:** This field is available only when the *sn_gf.weighted_average_enabled* system property is set to **Yes**.
Owner	Owner of the target.
Contributors	Users who contribute to achieving the target.

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Duration section form fields

Field	Description
Start date	Start date for the target. By default, the start date of the current quarter is populated.
End date	End date for the target. By default, the end date of the current quarter is populated.

Metrics section form fields

Field	Description
Unit of measure	Measure type for the specified value. The available measure types are stored in the Units [sn_gf_units] table.
Base value	Base value of the target. The base value can also be considered as the present or current value.
Actual value	Actual value of the target at a given time. This field is available only when the **Type** field is set to **Maximize** or **Minimize**.
Type	Target type that shows the direction of achievement. The available options are: • **Maximize**: The direction of the progress is toward the **Target value** from the **Base value**. The base value must be less than the target value. • **Minimize**: The direction of the progress is toward the **Target value** from the **Base value**. The target value must be less than the base value.
Target value	Target value of the target. This value is the goal that your team wants to reach. This field is available only when the **Type** field is set to **Maximize** or **Minimize**.
Review frequency	Option to specify how frequently should the owner or contributor be updating the actual value of the target. The available options are: • **Daily** • **Weekly** • **Fortnightly** • **Monthly** • **Quarterly** • **Yearly**

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Metrics section form fields (continued)

Field	Description
Remark	Remark entered for business justification when updating the target.
Review date	The date on which the target is to be reviewed.

Related topics

- Manage goals
- Add a quantitative target to a goal
- Add a qualitative target to a goal

Create new demand form

Create a demand for your application or capability.

Create new demand form fields

Field	Description
Assumptions	Assumptions made for the demand. Assumptions help to define scope and risks, and fine-tune the estimates for time and cost.
Approved end date	The approved date for completing the demand.
Approved start date	The approved date for starting the demand.
Action	Course of action for the demand.
Barriers	Major barriers to the demand.
Business capabilities	One or more capabilities to associate the demand with.
Impacted business applications	Business applications that are impacted by the demand.
Capital budget	Total capital budget allocated to the demand across all fiscal years. The value is rolled up from the Capital expenditure (Capex) budget of the demand.
Category	Category of the demand. The available options are: • **Strategic** • **Operational**
Business unit	Business unit to which the demand submitter belongs.
Capital expense	Capital expenditure (Capex) for the demand.
Business case	Business arguments that support the demand.

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Create new demand form fields (continued)

Field	Description
Collaborators	Users who can edit or contribute to the demand. A demand requester can select any user as a collaborator.
Demand manager	Name of the demand manager.
Demand	The name of the demand.
Enablers	Key enablers of the demand.
Demand actual cost	Total cost incurred while working on a demand and demand tasks. **Note:** To populate this field, you must run the **Update Demand Actual Cost and Actual Effort** schedule job.
Demand actual effort	Time accrued or spent by a resource while working on a demand or a demand task. **Note:** To populate this field, you must run the *Update Demand Actual Cost and Actual Effort* schedule job.
Financial return	Result is calculated based on values in the **Total costs** and **Financial benefit** fields.
Risk level	The level of risk associated with the demand. The available options are: • **Critical** • **High** • **Moderate** • **Low** • **Planning**
Financial benefit	Estimate of revenue if the demand is approved. This value is rolled up from the benefit breakdown of the demand. You can also enter the value manually. Select a currency icon and enter a value.
ROI %	Assesses demand return on investment (ROI) compared to other demands.
Impacted business units	Business unit that is impacted by the demand.

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Create new demand form fields (continued)

Field	Description
Labor costs	Expenses associated with the manpower required to work on the demand.
In scope	Scope of the demand. It's the set of boundaries that define the extent of a demand.
Operating budget	Total operational budget allocated to the demand across all fiscal years. The value is rolled up from the Operational expenditure (Opex) budget of the demand.
Related records	Records associated with the demand.
Risk of not performing	Risks if the demand is not approved, for example, risk of loss of opportunity.
Due date	Requested completion date of the demand.
Risk of performing	Risks if the demand is approved and implemented.
Operating expense	Operational expenditure (Opex) for the demand.
Other costs	Other miscellaneous costs associated with the demand.
Out of scope	Activities or deliverables that aren't in the scope of the demand. Anything which isn't defined in the scope is out of scope.
Cost	Total cost associated with the demand.
Score	Demand score is calculated based on **Risk**, **Value**, and **Size** attributes in the base system. • When the **Risk** and **Size** are high, the score of the demand is low. • When the **Value** is high, the score of the demand is high.
Risk	Risk value calculated from the demand assessment.
Strategic Alignment	A value to assess how closely the demand aligns with the strategic goals of the organization.
Value	Business value of the demand.
Type	Type of the demand. The available options are: • Project • Change

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Create new demand form fields (continued)

Field	Description
	The **Category** field selection determines the options available in the **Type** field.
Size	Size of the demand.
T-shirt size	Categorizing the demand into different sizes, to give a quick understanding of the relative complexity of the demand and the effort required for its completion. The available sizes are: • **S- Small** • **M- Medium** • **L- Large** • **XL- Extra Large** • **XXL- Extra Extra Large**
Stage	The current state of progression of the demand.
Start date	Start date of the demand.
Submitted on	Date on which the demand was submitted for approval.
Total planned cost	Result is calculated based on values in the **Capital expense** and **Operating expense** fields.
Visited states	The different states through which the demand has passed through. For example, the demand has gone through the states of **Open** and **Closed**. The visited state number in this scenario will be 2.
Primary goal	The primary goal behind the creation of the demand
Digital integration	Digital integration associated with the demand.

Related topics

Manage demands

Add or edit a demand

Create new value stream form

Create a new value stream to visualize the flow of a process from start to finish.

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Create new value stream form fields

Field	Description
Name	Name of the value stream.
Value stream category	The category with which the values stream is associated with.

Related topics

- Manage value streams
- Add or edit a value stream

Create new value stream to process form

Add a value stream to a process to create an efficient workflow.

Create new value stream to process form fields

Field	Description
Business process	The business process with which you want to associate the value stream.
Value stream	The value stream that is to be associated with the business process.
Order	The sequence of the activity within the value stream with which the business process is to be associated.
Value stream stage	The specific stage of the value stream that is to be associated with the business process.

Related topics

- Manage value streams
- Add a value stream to a business process

Create new application model form

Add an application model to a value stream for better management of your application portfolios.

Create new application model form

Field	Description
Description	A description of the model as it appears in the product catalog.
Manufacturer	The company that built the model.
Model categories	The category to which the model is assigned.
Name	The manufacturer-assigned name of the model.
Short description	A brief description of the model.
Comments	Information about the model that would be helpful for others to know.

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Application Model section form fields

Field	Description
Manufacturer	The company that built the model.
Model categories	The category to which the model is assigned.
Name	The manufacturer-assigned name of the model.
Short description	A brief description of the model.
Comments	Information about the model that would be helpful for others to know.

Related topics

- Manage value streams
- Add an application model to a value stream

Create new value stream stage form

Add a value stream stage to identify and map each activity associated with that stage of the overall value stream.

Create new value stream stage form

Field	Description
Name	The name of the stage.
Order	The order in which this stage appears within the overall value stream.
Description	A brief description of the value stream stage.
Value stream	The name of the value stream with which the value stream stage is associated.

Related topics

- Manage value stream stages
- Add or edit a value stream stage

Create new role permissions

Create role permissions to associate them with architectural artifacts.

Create new role permissions form fields

Field	Description
Document	The architectural artifact associated with the role permission.
Permission	The type of permission linked to the user role. The available options are:

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Create new role permissions form fields (continued)

Field	Description
	• **Reader** • **Writer** • **Owner**x
User role	The user role to which the permission is provided.

Related topics

Manage architectural artifacts

Add a role permission for an architectural artifact

Create new user criteria permissions

Create user criteria permissions to associate them with architectural artifacts.

Create new user criteria form fields

Field	Description
Document	The architectural artifact associated with the user criteria permission.
Permission	The type of permission linked to the user criteria permission. The available options are: • **Reader** • **Writer** • **Owner**
User criteria	The user group to which the permission is provided.

Related topics

Manage architectural artifacts

Add a user criteria permission for an architectural artifact

Create new user permissions form

Create user permissions to associate them with architectural artifacts.

Create new user permissions form fields

Field	Description
Document	The architectural artifact associated with the user permission.
User	The user to whom the permission is provided.

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Create new user permissions form fields (continued)

Field	Description
Permission	The type of permission linked to the user. The available options are: • **Reader** • **Writer** • **Owner**

Related topics

Manage architectural artifacts

Add a user permission for an architectural artifact

Create new group permissions

Create group permissions to associate them with architectural artifacts.

Create new group permissions form fields

Field	Description
Document	The architectural artifact associated with the group permission.
Permission	The type of permission linked to the group. The available options are: • **Reader** • **Writer** • **Owner**
User group	The user group to which the permission is provided.

Related topics

Manage architectural artifacts

Add a group permission for an architectural artifact

Create new versions form

Create new versions of architectural artifacts.

Create new versions form fields

Field	Description
Document	The architectural artifact for which the version is being updated
Version state	The state of the artifact version.

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Create new versions form fields (continued)

Field	Description
File type	File type as either a URL or attachment. Perform one of the following: • To upload a file, select **Attachment**, and then select **Select File** in the **Attachments** section of the page. • To link to a document, select **URL** and provide the link.
Notes	Comments about the architectural version.

Related topics

Manage architectural artifact versions

Add an architectural artifact version

Create new application category form

Create an application category to categorize applications and rationalize decisions on their usage.

Create new application category form fields

Field	Description
Name	Unique name of the application category.
Category group	The category group with which the application category is associated.
Description	Description of the application category.

Related topics

Configure application categories

Add or edit an application category

Create new application category group form

Create an application category group or edit an existing one to align it with your business requirements.

Create new application category form fields

Field	Description
Name	Unique name of the application category group.
Description	Description of the application category group.

Related topics

Configure application category groups

Add or edit an application category group

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Create new application family form

Create an application family to align it with your business requirements.

Create new application family form fields

Field	Description
Name	Unique name of the application family.
Description	Description of the family.
Domain	Domain that the application family is associated with.

Related topics

Configure application families

Add or edit an application family

Create new indicator form

Create an application or capability indicator to assess applications or capabilities within the indicator framework.

Create new indicator form fields

Field	Description
Name	Name of the application or capability indicator.
Short description	Short summary of the application or profile indicator.
Result limit	The maximum number of records an indicator displays when running an associated script. This enables better performance of Enterprise Architecture by not processing too many records.
Category	Category that the indicator is associated with.
Direction	Business applications or capabilities with maximum or minimum values. • Select **Minimize** if lower values are better. • Select **Maximize** if higher values are better.
Unit	The type of unit in which indicator scores are displayed. Units can be numbers, percentages, currencies, quantities of time, or any other entity you define.
Automatic refresh interval	The refresh interval to update the indicator scores within the defined time range.
Order	The position of the indicator in the sequential order of all other indicators while accessing an application or capability.

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Data source configuration section fields

Field	Description

Data source	Defines the location from which the indicator receives data.
	• **Performance Analytics**: Collects scores from indicators created in Performance Analytics. See Performance Analytics indicators.
	• **Custom Script**: Allows you to write a script that collects data from another application. Beneath the **Data Source** field, a sample script appears. Customize the script as needed. An example custom script is:
	`var results = {};`
	`var applications = [];`
	`var incidentCount = 0;`
	`var applicationsGr = new GlideRecord("cmdb_ci_business_app");`
	`applicationsGr.addQuery('active', true);`
	`applicationsGr.query();`
	`//for each application get incident count at business service level`
	`while(applicationsGr.next()){`
	`incidentCount = 0;`
	`var gr = new GlideRecord("incident");`
	`gr.addEncodedQuery("opened_atBETWEEN" + startDate + "@" + endDate);`
	`gr.addQuery('cmdb_ci_business_app', applicationsGr.getUniqueValue());`
	`gr.query();`
	`incidentCount = gr.getRowCount();`
	`var appInfo = {};`
	`appInfo.appId = applicationsGr.getUniqueValue();`
	`appInfo.weight = incidentCount;`

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Data source configuration section fields (continued)

Field	Description

	``
	applications.push(appInfo);
	}
	results.applications =
	applications;
	results;
	``
	• **Query Condition**: Allows you to select a table to run filters on to obtain data.
	• **Assessments**: Allows you to evaluate, score, and rank records by assessing records in a table. See Create metric types and generate assessable records. To view results of survey assessments within APM, see Generate survey assessments and view results within APM.
	• **Indicators**: Allows you to add dependent child indicators. Through the child indicators, data is gathered to the parent indicator.
	For example, if the parent indicator is number of issues, the dependent indicators can be number of incident counts, number of problems, and changes. These dependent indicators are child indicators and the number of incidents, problems, and changes recorded are consolidated up to the parent indicator as the number of issues.

Indicator	The **Indicator** field appears when **Performance Analytics** is selected from the **Data source** list. Indicators are statistics that are used to measure current conditions and forecast trends.

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Data source configuration section fields (continued)

Field	Description
	Note: If the collection frequency of the application indicator isn't greater than the frequency at which the data of the Performance Analytic indicator are generated, then the system displays an error message: `Frequency of the indicator must always be greater than or equal to the frequency of the datasource configuration indicator`. For more information, see Collection of PA indicator score data.
Default breakdown	Name of the Performance Analytics breakdown.
Normalized script	A script to evaluate and score business applications and capabilities using standardized metrics. It involves using indicators that provide a normalized score for the condition they are evaluating. These indicators can be based on assessments, query conditions, custom scripts, or performance analytics.

Click Through section fields

Field	Description
Click through URL navigation type	Select whether to view the application or capability indicator details in a new window, in the same window, or in a dialog box.
Click through URL script	The script associated with an indicator that allows users to select a URL and view the indicator data in a related application or dashboard. This enables quick access to relevant information, or actions related to the indicator data.

Related topics

- Configure indicators
- Add or edit an application indicator
- Add or edit a capability indicator

Create new scoring profile form

Create an application score profile and update the default application profile with new profile indicators per your requirements.

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Create new scoring profile form fields

Field	Description
Name	Name of the scoring profile.
Description	Description of the scoring profile.
CI Class	Configuration item type for which the score is generated.

Related topics

Configure scoring profiles

Add or edit a scoring profile

Certification schedule form in Enterprise Architecture Workspace

A system administrator with Enterprise Architecture (formerly APM) admin role can create and assign data certification tasks to the system owners for certifying business application data.

Certification Schedule form fields

Field	Description
Name	Name of the certification schedule.
Filter	Select a filter for the table data.
Table	The table consisting the data that is to be certified. Defaults to cmdb_ci_business_application table. **Note:** Data certification can be applied only on one table at a time. Create another table if you require data certification on that table.
Display fields	Select the fields to be displayed from the business application. **Note:** Display fields cannot be the same as Certification fields. They are mutually exclusive.
Certification fields	Select fields to be displayed that require individual field certification. Specify the fields that you want to be certified. **Application URL**, **Business criticality**, **Data classification**, **Contract end date**, **Active**, **Active user count**, **Status**, **User base**, and **Last change applied date** are some of the fields preconfigured for data certification.

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Field	Description
Assignment type	Select a user reference field from the target table. • **User field**: Select and assign a specific field in the Business application table in the **Assign to** field. • **Specific User**: Select and assign a specific user in the **User** field. • **Group Field**: Assign the certification schedule to a group in the **Assign to group** field. • **Specific Group**: Select and assign the certification schedule to a group in the **Group** field.
Assign to	Owner of the application who is responsible for certifying the data of the business application.
User	Select a user to whom all the unassigned tasks will be assigned to.
Assign to group	Select a group from the business application table.
Group	Select a group from the choice list.
Assign to empty	Select a value from the choice list: • **Do Not Create Task**: Certification task is not created for these records. • **Create Unassigned Task**: Certification task is created but is unassigned. • **Create Assigned Task**: Certification task is created and assigned to the specific user or group. **Note:** The field is available only when you select the **Assignment type** as **User Field** or **Group Field**.
Days to complete	Enter the number of days by which you require the certification to be completed.
Active	The job is inactive by default. Select the check box to run the scheduled job.
Run	Frequency with which the certification task is performed: Daily, Weekly, Monthly, Periodically, Once, On Demand.
Last run date	Defaults to the prior date when the certification was run. The field cannot be

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Field	Description
	edited if the certification schedule is a new record.
Task description	Brief description of the certification task.
Instructions	Detailed instruction to the application owner about the task.

Certification Instances section fields

Field	Description
Number	Number of the certification instance.
Certification Schedule	Defines the information that requires certification and the frequency of execution. Defaults to the certification schedule that you selected.
State	Status of the certification: **Work in Progress** or **Complete**.
Created	Created date of the certification instance.
Complete by	The date on which the certification task is to be completed. **Days to complete** is added to the **Created** date.
Percent complete	For each field (out of the total number of certification fields) that the application owner certifies the percent is calculated. The system administrator can track the progress of the data certification task.
Short description	Brief description of the certification instance.

Certification Tasks section fields

Field	Description
Number	Number assigned to the certification task.
Assigned to	Owner of the application to whom the task is assigned and who is authorized to certify the data.
Assignment group	Task can also be assigned to users of a group.
Escalation	Defaults to Normal.

Shape library form

You can add new shapes to the shapes library as per your requirement. Use these shapes to create the diagrams in Enterprise Modeling and Visualization.

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Shape library form fields

Field	Description
Name	Enter a name for the shape library.
Application	Name of the application that the shape library is associated with. This is field is auto-populated as Digital Integration Management and can't be edited.
Active	Select the check box to show the shape library in the Enterprise Architecture Workspace.
Domain	Name of the domain. Use the look up icon to select a domain name.

Modeling configuration form

The modeling configuration form helps you to configure UI options for Enterprise Modeling and Visualization.

Modeling configuration form fields

Field	Description
Name	Name of the configuration.
Active	Select to enable the configuration.
Description	Enter description for the configuration.
Roles	Select roles to provide access to the configuration.
Users	Select individual users to provide access to the configuration.
Groups	Select groups to provide access to the configuration.

Entity configuration form

The entity configuration form helps you to configure entities that can be used in the Enterprise Modeling and Visualization.

Entity configuration from fields

Field	Description
Name	Name of the entity.
Entity	Type of the entity.
Display field	Name of the field to be displayed.<check with team>
Diagram action	Action name in the diagram.
Insert allowed	Select to allow inserting the entity in the diagram.

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Field	Description
View	

Relationship configuration form

The entity configuration form helps you to configure entities that can be used in the Enterprise Modeling and Visualization.

Relationship form fields

Field	Description
Relationship Type	Select the type of relationship. The choice list include: • Reference • M2M table • API • CI Relationship
Base Entity	Select the base entity for the relationship.
Base Reference	Define the base reference.
Related Entity	Select a related entity.
Related Reference	Define the related reference.
Base Entity Configuration	Select the base entity configuration for the relationship.

Base Entity Conditions section fields

Field	Description
Set conditions	Use the link to set base entity conditions using the field, operator, and value filters.

Related Entity Conditions section fields

Field	Description
Set conditions	Use the link to set related entity conditions using the field, operator, and value filters.
M2M Table	Select the M2M table type.

M2M Entity Conditions section fields

Field	Description
Set conditions	Use the link to set M2M entity conditions using the field, operator, and value filters.

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Digital interface SDLC component form

The SDLC components represent the artifacts or configurations that are used to implement an Interface.

Digital interface SDLC component form fields

Field	Description
Number	Unique identifier of the digital interface SDLC component record. This field is automatically generated and can't be edited. The number starts with the prefix DINTFSDLC. For example: DINTFSDLC0001005.
Digital Interface	Name of the digital interface. This field is auto-populated with the name of the interface that you're editing. If you want to create the relationship to a different digital interface, use the Lookup icon to select a digital interface.
SDLC component	Select the SDLC component associated with provider business application of the digital interface.
Description	Description about the connection between the digital interface and the SDLC component.

Related topics

Relate an SDLC component to a digital interface

Digital interface information object form

A digital interface is related to a business application, and the business application will have related information objects. You can use this relationship to get the logical data of the information object.

Digital Interface Information Object form fields

Note:
The Supported CRUD Operations section helps you to define how you can interact with the information objects used, consumed or exposed by an Interface.

Field	Description
Information Object	Select the information object associated with provider business application of the digital interface. For a digital interface provided by a company, you can select any available information object.
Digital Interface	Name of the digital interface. This field is auto-populated with the name of the interface that you're editing. If you want to create the relationship to a different digital interface, use the Lookup icon to select a digital interface.

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Field	Description
Active From	Select the date from when the information object will be active.
Active Until	Select the date by when the information object will be inactive.
Number	Unique identifier of the digital interface information object record. This field is automatically generated and can't be edited. The number starts with the prefix DINTFIO. For example: DINTFIO01234.
Description	Description about the connection between the digital interface and the information object.

Supported CRUD Operations section fields

Field	Description
Can create the object?	Select Yes or No.
Can update the object?	Select Yes or No.
Can retrieve the object?	Select Yes or No.
Can delete the object?	Select Yes or No.

Related topics

Relate an information object to a digital interface

Digital interface credentials form

short description.

Credentials form fields

Note:
The 'Integration user' and 'Connection and credential alias' fields will be editable when the 'Platform Host' field is set to 'ServiceNow' in the related Provider Business Application of the referenced Digital interface. You require the role 'credential_admin' or 'connection_admin' to view or set the 'Connection and credential alias' field.

Digital Interface	Name of the digital interface. This field is auto-populated with the name of the interface that you're editing. If you want to create the relationship to a different digital interface, use the Lookup icon to select a digital interface.
Number	Unique identifier of the digital interface credential record. This field is automatically generated and can't be edited. The number starts with the prefix CRED. For example: CRED01001.

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Digital Integration	Select a digital integration, where the digital interface is being used as a provider or subscriber digital interface.
Life cycle stage	Select the life cycle stage for the credentials. Choice list includes: • Design • Operational • End of Life
Environment	Select the environment type from the choice list.
Life cycle stage status	Select the life cycle stage status for the credentials. The choice list depends on the selection in the **Life cycle stage** field. • Design-Design • Operational-In use • End of Life-Retired
Managed by group	Select the name of the group who will manage the credentials.
Credential	Enter the name of the credentials.
Integration user	(Optional) Reference to the integration user or service account.
Authentication type	Select the authentication type from the choice list.
Connection and credential alias	Select the connection and credential alias ID from the from the reference field.
Authorization type	Select the authorization type from the choice list.
Credential store URL	Enter the URL where the credentials are stored and can be consulted.
Description	Description about the connection between the digital interface and the documented credentials.
Notes	Enter notes about the credentials.

Related topics

Relate credentials to a digital interface

Create a business capability map form

Creating artifacts for the business capability hierarchy map helps you to update the capability hierarchy directly in the map using Enterprise Modeling and Visualization.

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Create a business capability map form fields

Field	Description
Link to artifact	Artifact to which you want to associate the diagram. Use the following options: • **New artifact**-Select to create an artifact and associate the diagram. • **Existing artifact**-Select to associate the diagram to an existing artifact.
Artifact name	Name of the artifact. Enter a name of the new artifact or select an existing artifact name based on the selection in the **Link to artifact** field.
Architectural category	Name of the category for the artifact.
Include business application	Select this check box to include business applications of a capability in the hierarchy map.
Include all business capabilities	Select this check box to include all the business capabilities in the hierarchy map.
Business capability	Name of the business capabilities for which you want to generate the hierarchy map. You can level-0 capabilities from the list. **Note:** This field does not appear when you select the check box for the field **Include all business capabilities**.

Related topics

Create a diagram for a business capability map

Create a business hierarchy map form

Create a business hierarchy map form

Creating artifacts for the business capability hierarchy map helps you to update the capability hierarchy directly in the map using Enterprise Modeling and Visualization.

Create a business hierarchy map form fields

Field	Description
Link to artifact	Artifact to which you want to associate the diagram. Use the following options:

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Field	Description
	• **New artifact**-Select to create an artifact and associate the diagram. • **Existing artifact**-Select to associate the diagram to an existing artifact.
Artifact name	Name of the artifact. Enter a name of the new artifact or select an existing artifact name based on the selection in the **Link to artifact** field.
Architectural category	Name of the category for the artifact.
Business application	Name of the business application. Select a business application to create the hierarchy map for it.

Related topics

Create diagram for a business hierarchy map

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