knowledge17

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Lab Guide

Application Portfolio Management 201

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admin / Knowledge17

itil / Knowledge17

employee / Knowledge17

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Introduction

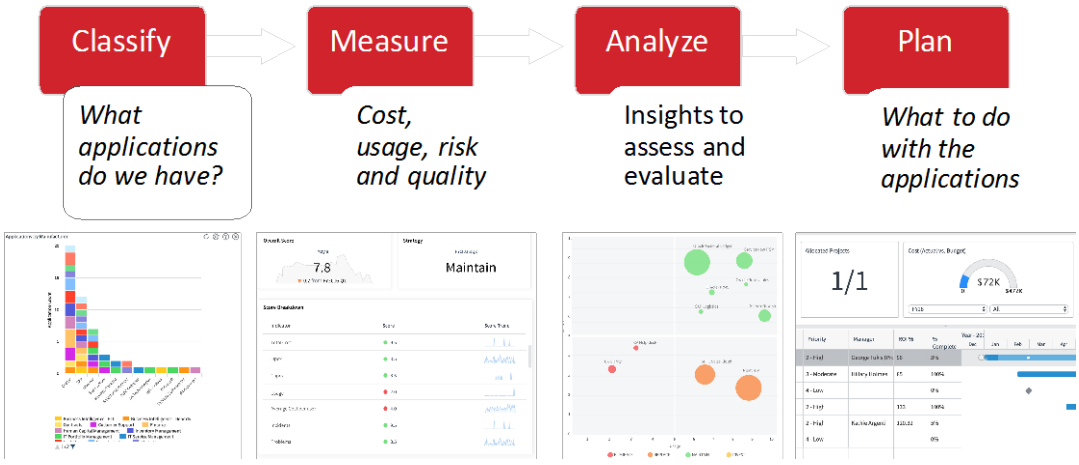
ServiceNow Application Portfolio Management (APM) provides key capabilities to build an application inventory to understand how many applications your business organization has and develop an application rationalization roadmap aligned to the enterprise goals and objectives. APM helps you to get a better insight into the applications using real-time data from the platform through reports and dashboards that enable you to make a better business judgment.

Adopting new business technologies is imperative to retain business and to compete in the ever-growing market, which increases the demand for new applications. The dynamics of technology are so profound that the organization is unable to take advantage of the existing applications to fulfill its increasing needs. Procuring new applications in addition to maintaining existing ones, and to keep a check on the redundancy of applications for similar functions add to the budgetary constraint of the organization.

Application Portfolio Management helps you to address business challenges, such as:

- Redundant applications for similar functions.
- Increasing cost incurred as a consequence of owning and maintaining applications.
- Ever 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- Inadequate performance because of outdated applications.

In this lab we will step through some basic administration tasks within Application Portfolio Management.

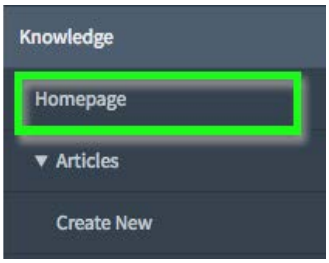


Log on to Your Lab Instance

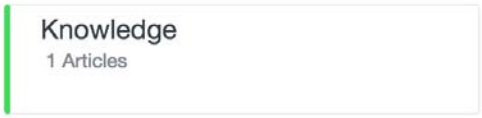
1. Navigate to the instance reservation URL provided by the instructor. For example: **https://apm201instructor1.lab.service-now.com/instance_reservation.do**
2. Enter your email address and click **Submit**.
3. Note the login credentials for the instance assigned to you. Click on the **link** to the instance.
4. Log on as **admin** using the provided password (**Knowledge17**).

Get the list of Business Applications

1. In the navigator, type **Knowledge** and find under the Knowledge module, **Homepage**.



2. Click the **Knowledge** knowledge base which should have 1 article.



3. Open up **K17 APM 201 Lab – Application List**.
4. Download the **K17_cmdb_ci_business_app.xlsx** and save it to your computer (desktop or downloads folder).
5. We will use this file in one of the lab steps.

Lab Goal

Lab 1
Business Applications

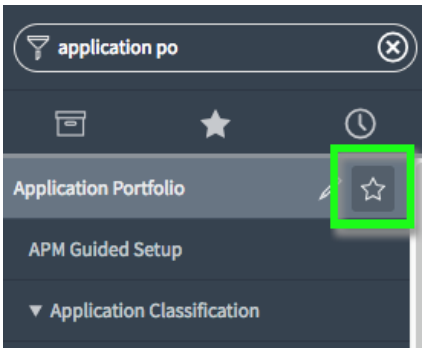
This lab introduces the new Business Application configuration item class to quickly get you started on the path of managing your business applications. A Business Application is defined as software used by business users to perform a business function.

Reviewing the Business Application List

Our starting point will be the Business Application lists.

1. Navigate to **Application Portfolio** by typing **application portfolio** in the application navigator filter box.

2. Add to Favorites by hovering over the right side of the menu item **Application Portfolio** and clicking the star that appears. This will add Application Portfolio as a favorite so that you can quickly navigate to Application Portfolio Management.



3. Select **Business Applications** from the navigator to get the list of all business applications.

4. Review the types of information that Application Portfolio Management tracks for business applications.

5. Under the column **Install type**, find **Cloud** and right-click and select **Filter Out**.

6. Under the column **Platform**, find **Unix** and right click and select **Show Matching**.

Build a Business Application report

1. Right click on the column header for **Manufacturer**, and select **Bar Chart**. You should have a report that shows all non-cloud applications that run on a Unix platform by manufacturer.

2. Give your report a name (e.g. My Report or Non-cloud Unix-based Business Apps by Manufacturer) and click **Save**.

Configuring the Business Application Form

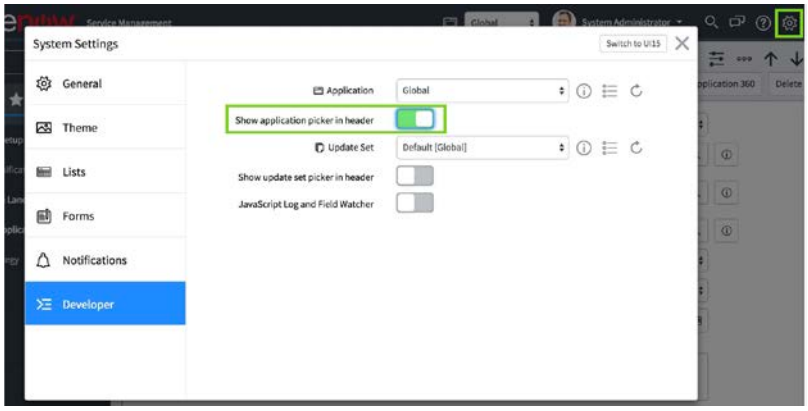
1. On the left-side navigator, click **Business Applications** to bring you back to the original list.

2. Click on the header for **Name** to sort in ascending order.

3. Click on the name **Legacy Customer Service**.

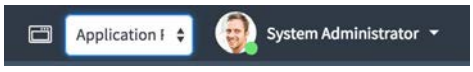
4. Application Portfolio Management is a scoped application so in order to configure it we need to change into that scope.

5. Click on the **System Settings** gear icon, and under **System Settings > Developer**, toggle the switch **Show application picker in header** on.



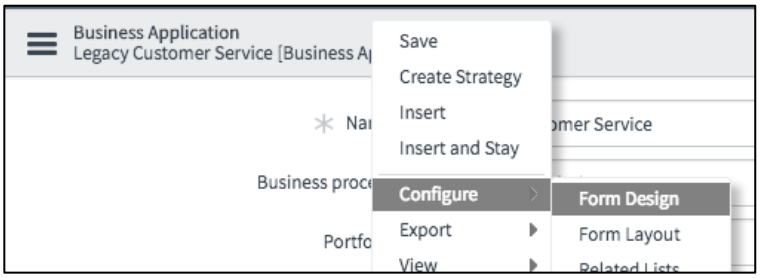
6. Close the **System Settings**

7. To the left of the **System Administrator** picture, change the pick list from **Global** to **Application Portfolio Management**



8. Scroll through the form for **Legacy Customer Service** to see the different fields of information that are tracked for this business application.

9. On the header of the form, right-click and select **Configure > Form Design**

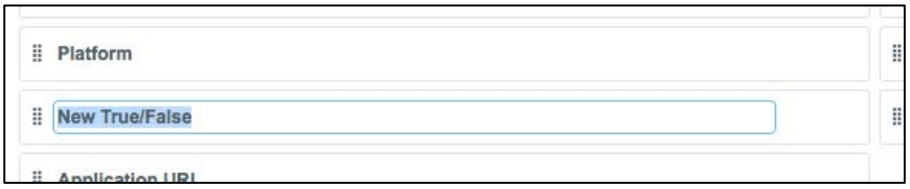


10. Form Design allows you to add existing Business Application Fields on the form or create new fields. On the left under Fields, find the **Active user count** and drag it on to the form under the **User base** field.



11. Again on the left, click the tab **Field Types**. This now shows new fields that you can create on a Business Application.

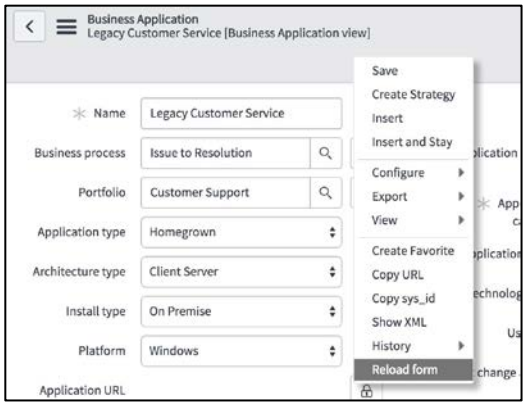
12. Find the **True/False** field type and drag it under the **Platform** field. It shows a label of **New True/False**



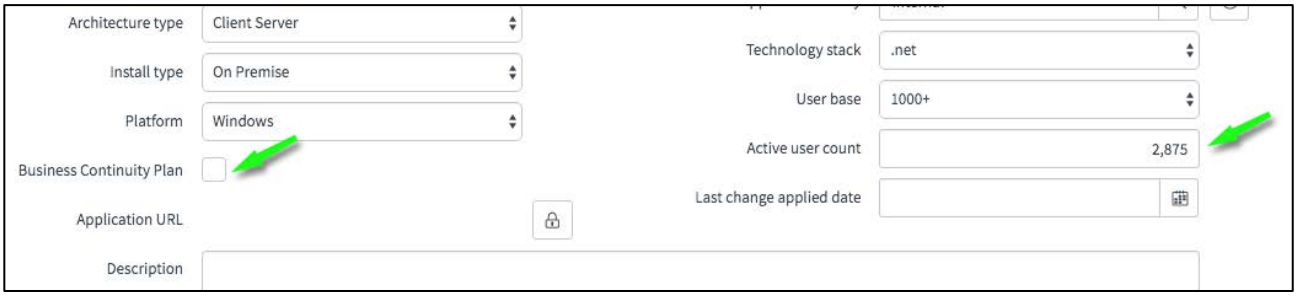
13. Change the name to **Business Continuity Plan** and click the Save button on the top right of the Form Design

14. When **Save Complete** appears on the screen, close this tab on the browser to return to the **Legacy Customer Service** Business Application.

15. Right-click on the header of the Business Application **Legacy Customer Service** and select **Reload form** at the bottom of the pop-up menu.



You now see the added fields that you configured for Business Application.



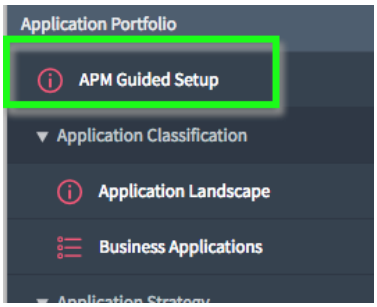
Lab Goal

Lab 2
APM Guided Setup

The purpose of this lab is to familiarize you with the new Application Portfolio Management Guided setup.

Configure Application Classification

1. On the navigator, find and select **APM Guided Setup**.



2. Click the **Get Started** button.

3. In the first section **Application Classification**, note 0/8 Tasks completed. You will configure the following Tasks:

   Application Category Group
   Application Category
   Application Family
   Business Process

4. Click the **Get Started** button on the left side of the **Application Classification** section

5. The first task on the Application Classification setup is Application Category Group. Note the description.

6. Click **Configure** and notice the list of all of the different Application Category Groups. You will use the existing **IT Management** group; no changes are necessary. On the lower right, click **Mark as Complete**.

7. Configure the Application Category by clicking **Configure** in Application Category. The category is used to classify applications based on the purpose or function.

8. On the header of the list, click the **New** button.

9. Type in the following for the New record exactly as shown below.

   Name: **Application Lifecycle Management**
   Category group: **IT Management**
   Description: **This set of applications support our business product development**.

10. Click **Submit**.

11. Mark Application categories as complete by clicking **Mark as Complete** in the lower right.

12. Configure Business Process by clicking **Configure** in Business Process. A business process is a method of relating structured tasks performed to accomplish a specific goal.

13. Click the **New** button to add a new Business Process.

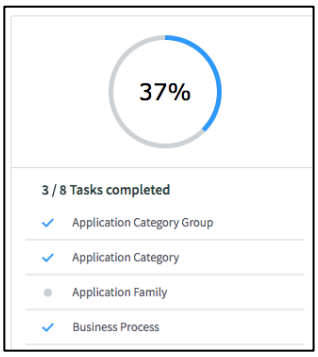
14. Enter the following information on the **New record** for Business Process.

    Name: **Requirement to Deploy**
    Category: **Business Process** (replace Business Service)

15. Click **Submit**.

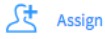
16. Mark Business Process task complete by clicking **Mark as Complete** in the lower right.

17. You should see that you are **37%** complete on Application Classification.



Assign Setup Tasks

Guided setup allows you to delegate configuration tasks to other users that have access to Application Portfolio Management.

1. On the top right, click on the icon **Assign** 

to assign tasks.

2. Under Application Family, click on Assign Task 

and assign it to **Fred Luddy**.

3. In the section Application Family, beside the title, click the **View Notes**.



4. Notice that a task has been created for Fred Luddy to complete this step.

5. Close the pop-up window by clicking on the 'x' at the top-right.

Loading New Applications

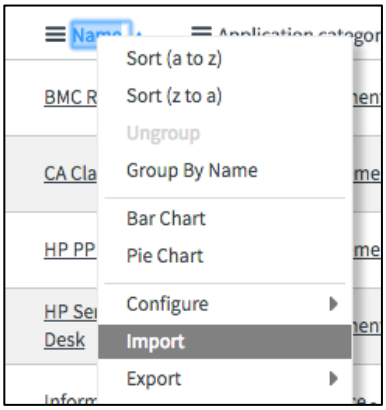
1. On the breadcrumb at the top of the Guided Setup, return to **APM Guided Setup**.



2. Scroll down to Application Inventory and click **Get Started**. 

3. Configure the **Applications** step and notice the list of 52 applications you saw before.

4. Right-click on the **Name** header of the list and select **Import**.

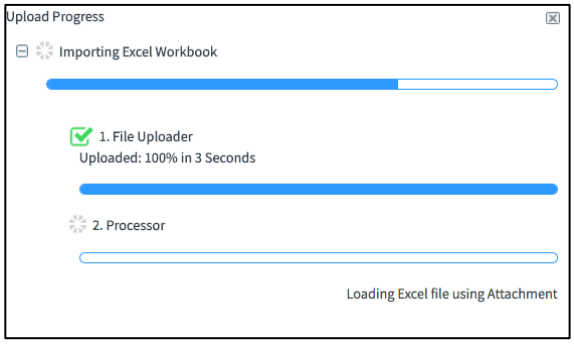


5. In Import external data into Business Application, deselect Do you want to create an Excel template to enter data?



6. Click the **Choose File** button to load the **K17_cmdb_ci_business_app.xlsx** spreadsheet you downloaded during the setup at the beginning of this lab.

7. Click **Upload**. (Wait for **Upload Progress** to complete)

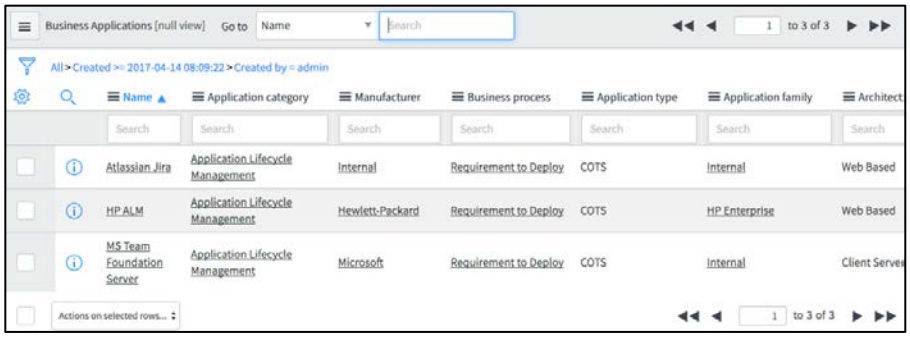


8. Once it is complete, click **Preview Imported Data**.

9. Click **Complete Import**.



10. You should have **3** new Business Applications that were imported.



11. Click on **Back to Guided Setup.**

12. In the Application Inventory Setup, beside Applications, click **Mark as complete**.

Lab Goal

Lab 3
CMDB Integration

In this lab we will see how Application Portfolio Management leverages the ServiceNow CMDB to help model the relationships between business applications and a business process and between business applications and IT infrastructure.

Set up Business Application Relationships

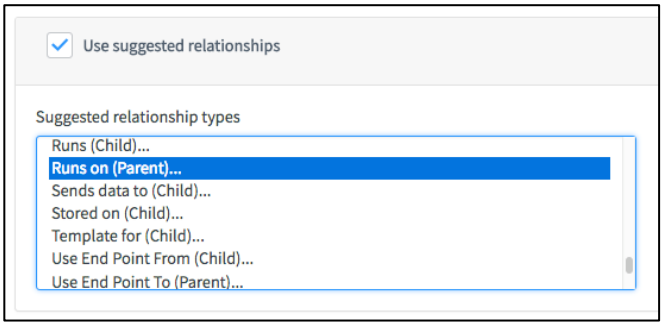
1. In the Application Inventory guided setup, beside CI relations click **Configure**.

2. Select the **Requirement to Deploy** business process record.

3. Near the bottom of the form, click the **Add CI Relationship** button in Related Items.



4. This will take you to the **Relationship Editor**. In **Suggested relationship types**, find the **Runs on (Parent)…**

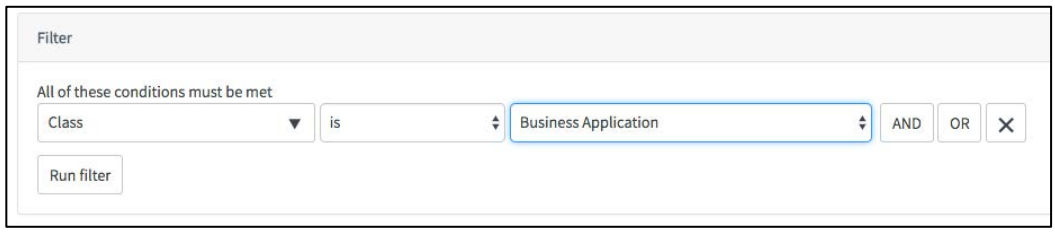


Adding Business Applications to the Business Process

1. In Filter, clear out the existing filters by clicking the ✕ beside both of the existing filters.

2. Create a filter as follows:

Class
is
Business Application



3. Click **Run filter**.

4. In Configuration Items, select the following applications by checking the box beside the **Name**

   Atlassian Jira
   HP ALM

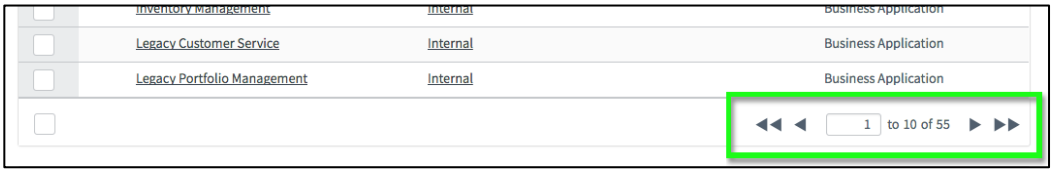
5. In **Relationships**, add the two applications by clicking the + button.



6. This will add those CI relationships to the **Requirement to Deploy** Business Process.



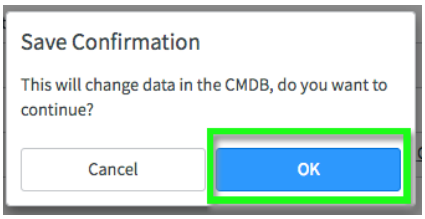
7. Using the page scroller on Configuration Items.



Find, select, and then add **MS Team Foundation Server** using Steps 5-6, above.

8. Click **Save** at the bottom of the Relationship Editor.

9. Click **Ok** when prompted.



Adding other Configuration Items to a Business Process

1. Return to the filter.

2. Create a filter as follows:

   Class
   is
   Business Service



3. Click **Run filter**.

4. Find, select, and then add **SAP Enterprise Services** (you can use the icon on the Configuration Items list).

5. You should have **4** Configuration Items with a **Runs on::Runs** relationship.

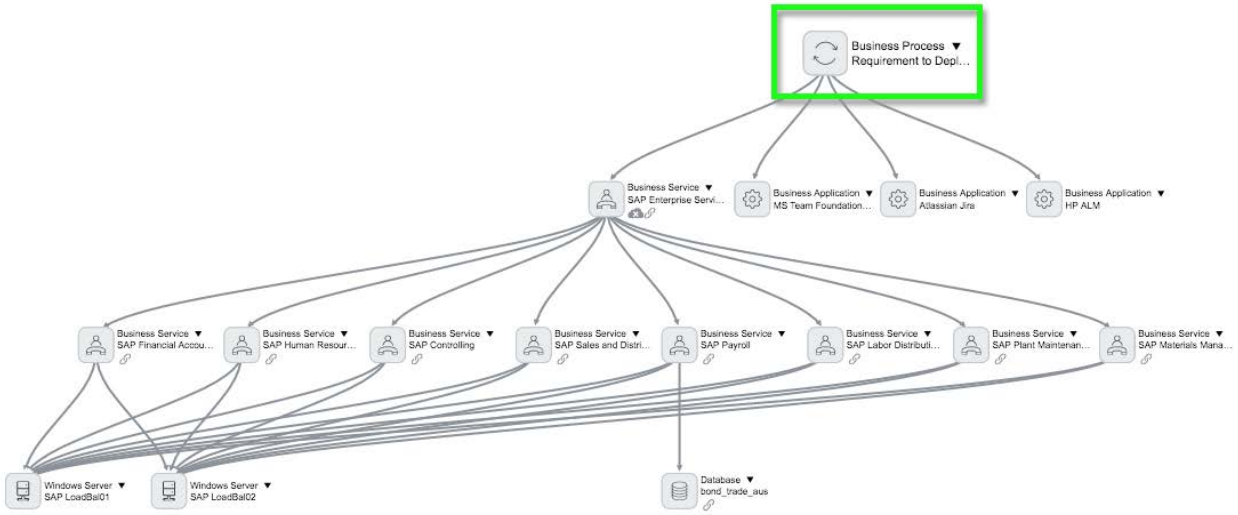
6. Click **Save and Exit**.

7. Click **Ok** when prompted.

8. Notice the **Related Items** are now filled with configuration items for the **Requirement to Deploy** Business Process. Click on the **Show Dependency Views**.



9. This shows the dependency of Business Applications and Business Services and related configuration Items to the **Requirement to Deploy** Business Process.



10. Close out the Dependency View tab, and then click on **Back to Guided Setup.**

11. In the Application Inventory Setup, beside CI relations, click **Mark as complete**.

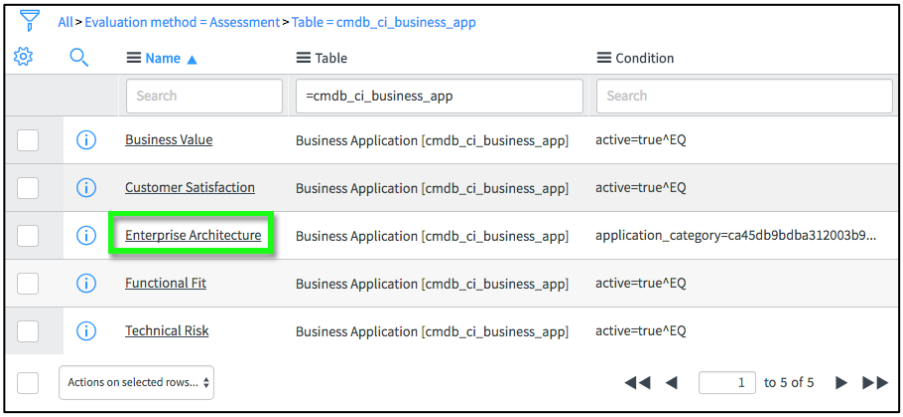
Lab Goal

Lab 4 Indicators and Application 360

In order to analyze and make decisions on Business Applications we need measurements to compare one Business Application to another. This is where Application Indicators and the Application 360 comes in to play. Application Indicators can be generated from Performance Analytics, Queries, Scripts, and Assessments. You will build an assessment and then run the related jobs to populate APM to analyze Business Applications.

Creating an Application Assessment

1. Return to **APM Guided Setup.** Under **Application Assessment**, click **Get Started**.
2. Beside **Surveys and Assessments**, click **Configure**.
3. The **Enterprise Architecture** Assessment Metric Type that has already been created for you.



4. Select and open the **Enterprise Architecture** Assessment Metric Type.

   Note the Conditions tab, the filter is set **Application category is Procurement** which means we will only generate assessments for the Procurement category of applications.

5. Click the **Generate Assessable Records**. You will see **3** business applications.
6. Click **Back to Guided Setup**.
7. Beside **Surveys and Assessments**, click **Mark as complete**.
8. Beside **Application Indicator**, click **Configure**.

9. The **Enterprise Architecture** Application Indicator has already been created for you.

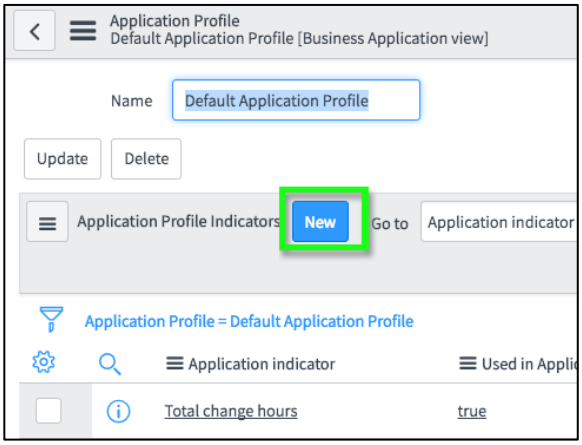
10. Click **Mark as Complete**.

Adding the Assessment to the Application Score Profile

1. Beside Application Score Profile, click **Configure**.

2. Select and open the **Default Application Profile**.

3. Under Application Profile Indicators, click **New**.



4. In the New record for Application Profile Indicator, fill in the following value:

   Application indicator: **Enterprise Architecture**
   Used in Application score calculation: **checked**
   Weightage: **10**

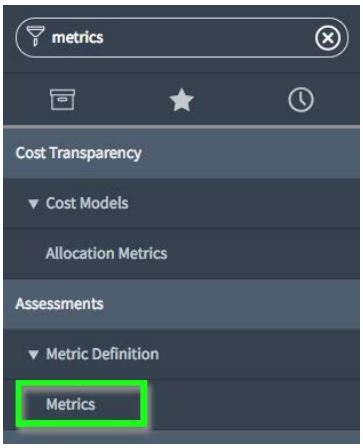
5. Click **Submit**.

6. Click **Back to Guided Setup**.

7. Beside Application Score Profile, click **Mark as complete**.

Creating the Assessment Questions

1. Now that you have configured the Assessment for the Business Applications, you will create the Assessment Metrics or Questions. In the Navigator, type **metrics** and Select **Assessments > Metrics**.



2. Click **New**.

3. In the **New record** for Assessment Metric, fill in the following values:

   Name: **Database Standards**
   Category: **Enterprise Architecture**
   Method: **Assessment**

   General tab
   Question: **What database platform does your business application use?**

   Field Type
   Data type: **Choice**

4. Right-click on the form header and select **Save**.

5. In Assessment Metric Definitions, click **New**.

6. In the **New record** for Assessment Metric Definition, fill in the following values:

   Display: MS SQL
   Value: 5

7. Click **Submit**.

8. Create 3 more Metric Definitions as follows:

   Metric Definitions

Oracle	4
MySQL	1
Other	0

9. On the Assessment Metric, click **Update**.

10. **Optional**: Create another Assessment Metric called **Webserver Standards**. Use the following for values:

    Name: **Webserver Standards**
    Category: **Enterprise Architecture**
    Method: **Assessment**

    General tab
    Question: **Does your Business Application use IIS or Apache?**

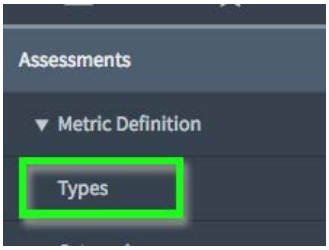
    Field Type
    Data type: **Choice**

    Metric Defintions

Yes	5
No	0

Generating the Assessment

1. Select **Assessments > Types**.



2. Select and open **Enterprise Architecture**.
3. Click **Assign Assessment**.
4. In Select Assessor, search for **Abel Tuter**.
5. Click **Ok**.
6. When you see the message **Instance created successfully,** at the top right click on **System Administrator** and select **Impersonate User**.
7. Search for **Abel Tuter** and select.
8. Select **My Assessments & Surveys** from the Navigator.
9. Take the Enterprise Architecture Assessment you created by clicking **Take Assessment** (fill in any answers you want).
10. At the top right, click on Abel Tutor and select Impersonate User to return to the **System Administrator** profile.

Running the APM Scheduled Job

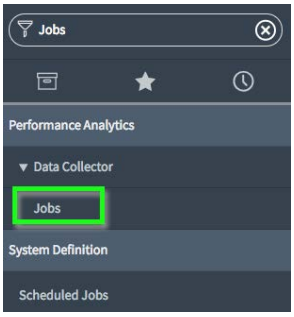
1. Go back to **APM Guided Setup**.
2. In **Application Assessment**, click **Continue**.
3. Scroll down to **Schedule Indicator sourcing job** and click **Configure**.

4. Click on the **Execute Now** button.

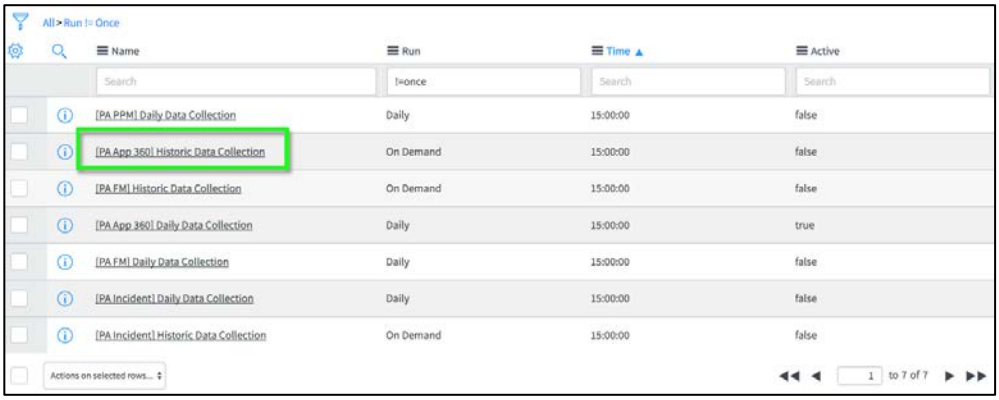


Running the Performance Analytics Application 360 Job

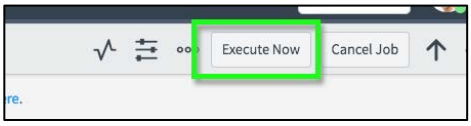
1. In the Navigator, type **Jobs**.
2. Select **Performance Analytics > Jobs**.



3. Select and open **[PA App 360] Historic Data Collection** job.



4. Click Execute Now.

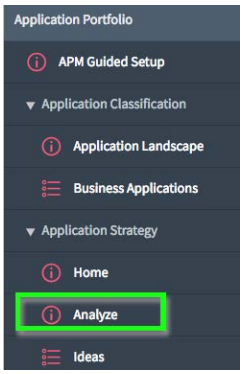


Viewing the Indicator data

1. Click on your **Favorites** filter on the Navigator.

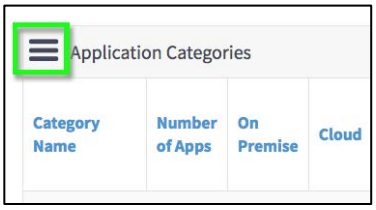


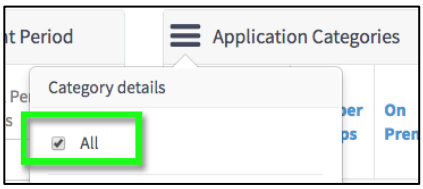
2. Find and select **Application Strategy > Analyze**.



3. In Category Analysis, **Select Fiscal Period to start Analysis** should be **FY17**.

4. Click the Category details picker and select **All** to show all of the indicators.





5. Notice the scores for **Enterprise Architecture** have been populated for the **Procurement** Application Category.

6. Open the **Procurement** Application Category.

7. On the bubble chart, Select Chart Dimensions  for:

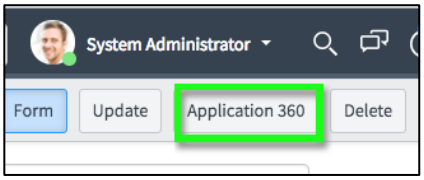
   X & Y:**Functional Fit Score vs Business Value Score**
   Bubble Size: **Enterprise Architecture**

   Note: the bubble sizes are reflective of the assessment results you gave earlier.

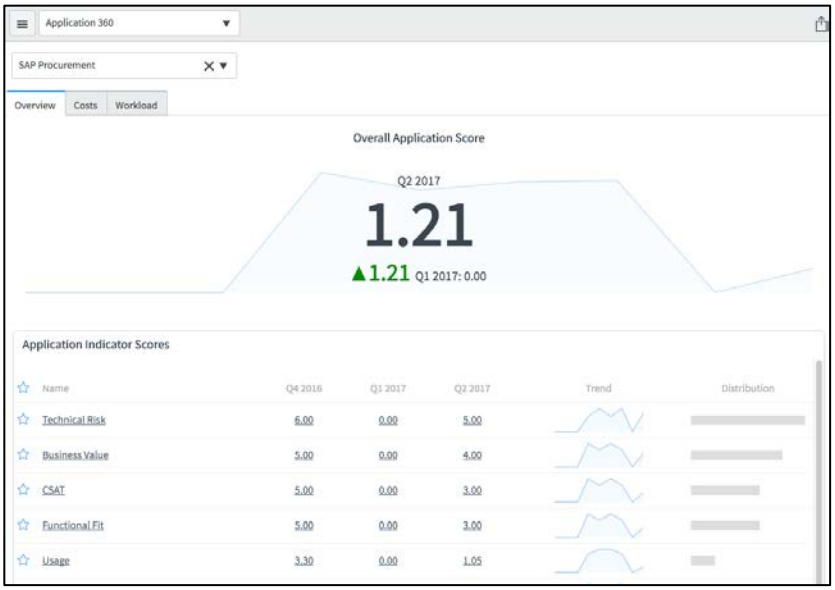
8. Select from the Applications on the right **SAP Procurement**.

Viewing the Application 360 data

1. Click on the **Application 360** button.



2. This opens up the Application 360 view in Performance Analytics to show trends of the Application indicators.



This is the end of the lab. Thank you for participating in APM 201!