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Strategic Portfolio Management

Enterprise-Wide Deployment Best Practices

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Executive Summary

Organizations implementing Strategic Portfolio Management (SPM) across multiple business units face significant challenges in accommodating diverse requirements while maintaining enterprise-wide governance and reporting capabilities. This white paper provides a comprehensive guide to Enterprise-wide Deployment (EWD) best practices using the ServiceNow platform.

Who is this guide for?

This technical guide is intended for **SPM or System Administrators** who are expanding their existing SPM implementation across different parts of their enterprise. Readers should have a solid understanding of ServiceNow AI Platform capabilities, as well as Strategic Portfolio Managment (SPM) features and processes.

What this document is *NOT*:

- A Step-by-step configuration manual
- A guide for non-SPM or custom solutions
- A substitute for expert consulting

What is Enterprise-wide Deployment (EWD)?

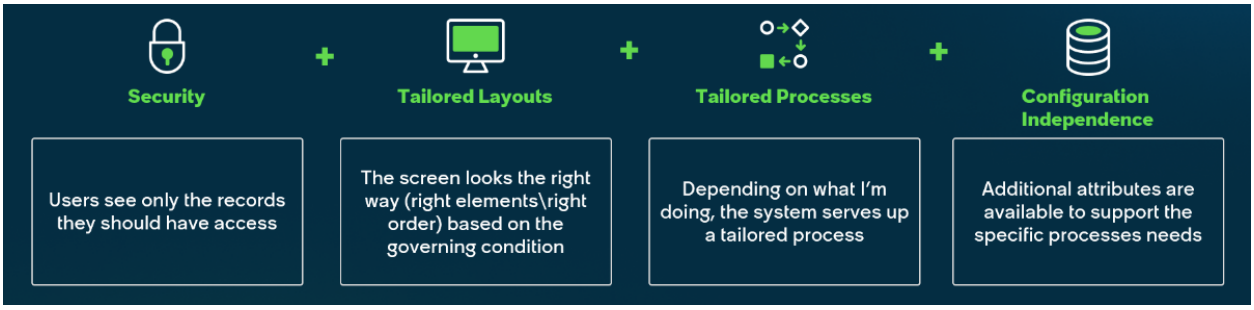
Enterprise-wide Deployment enables multiple business units to leverage SPM with tailored configurations while maintaining a unified data model and governance structure.

Enterprise-wide Deployment (EWD) refers to the process of enabling multiple teams or departments within an organization to use SPM, while accommodating each group's unique requirements for security, user experience, business processes, and data models as part of an enterprise framework.

Successful EWD implementation balances standardization with flexibility, allowing diverse business units to work within a common platform while maintaining their specific workflows, security requirements, and user experiences. This approach ensures that data remains consistent and accessible for enterprise-wide reporting and analysis.

Challenges in Enterprise-wide Deployment

Typically organizations face four challenges in the following key areas:



Security

Challenge: Implementing data segregation to restrict access based on the organization structure

Organizations need to ensure that each business unit can only access their own portfolio data while allowing leadership to view aggregated enterprise-wide information. This requires sophisticated security models that can accommodate complex organizational hierarchies and reporting structures.

Tailored Layouts

Challenge: Adapting user interfaces to meet the specific needs of different types of work and organization

Different business units often require customized forms, views, and workflows to support their specific processes. Creating and maintaining these customizations without compromising system performance or future upgradability presents significant challenges.

Tailored Processes

Challenge: Supporting diverse business or process logic

Each business unit may have unique approval workflows, stage gates, and process requirements. Managing these variations while maintaining a consistent core process across the enterprise requires careful planning and implementation.

Configuration Independence

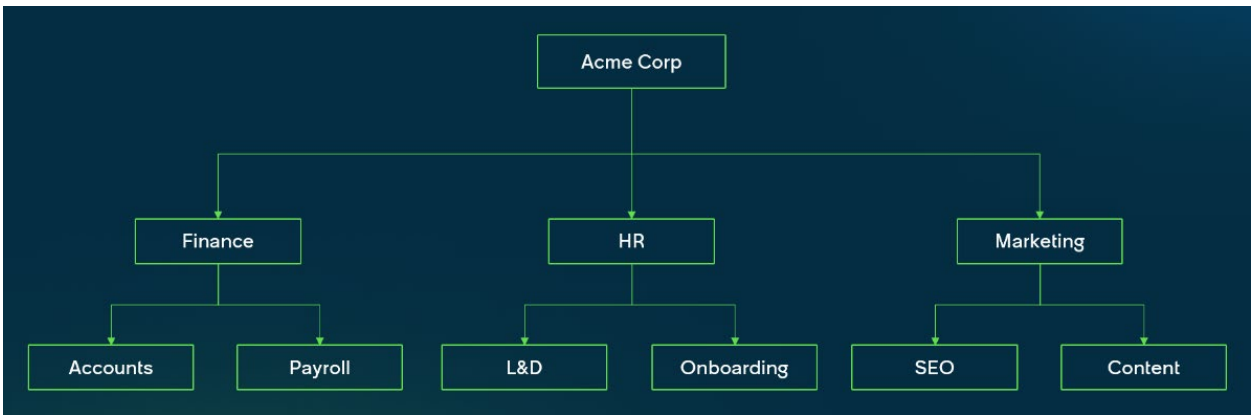
Challenge: Adapting the data model to support specific business domain attributes

Different units often need custom fields and relationships to capture their domain-specific information. Balancing these requirements with the need for standardized data structures for cross-organizational reporting is a significant challenge.

Use Case Example

The following example illustrates common challenges organizations face when implementing SPM across multiple business units with diverse requirements.

Consider a large organization with four business units—IT, Finance, Marketing and HR—each with its own tools and processes.



While IT may already use the SPM suite, onboarding Finance, Marketing and HR introduces new complexities:

Business Unit	Specific Requirements
Finance	Workflow-heavy project management integrated with approval hierarchies
HR	Strict confidentiality and minimal data exposure.
Marketing	Creative project management with custom fields for campaign tracking
All Units	Data segregation required to restrict users to only viewing records (Demand, Project and respective supporting data) associated with their Business Unit

Approach & Recommendations

This section outlines recommended approaches for implementing Enterprise-wide Deployment including specific guidance based on your SPM version

Key recommendation: For customers on Yokohama (N-2): Use Security Data Filters and ACLs (If a hardened access control is required) as described in the Appendix. For customers on Zurich or Australia (N-1 and N): Upgrade to leverage **Partitions** as the primary approach for enterprise-wide deployment.

Pillar	Yokohama	Zurich	Australia +
Security	Security Data Filters + ACLs (Deny-Unless if required *) + Confidential Project	Partition (EWD plugin) + ACLs (Deny-Unless if required *) + Confidential Project	
Tailored Layouts	Views + UX View Rules (and view rules for classic UI)	Project: Project Types with views (EWD Plugin) Demand: UX View Rules (and view rules for classic UI)	
Tailored Processes	Project Playbook	Demand and Project Playbook	
Configuration Independence	Custom fields and Custom tables	Project: Project Types with Dynamic categories (EWD Plugin) Demand: Custom fields and Custom tables	

* If a hardened access control is required

Security

Primary Approach: For Zurich and Australia releases, use **Partitions** as the primary mechanism for data separation. Create a partition, define a custom role for that partition, configure partition criteria for each partitioned table (project, demand, portfolio, program), and assign the role to users and user groups. Add ACLs if a hardened access control is required.

For Yokohama customers: Use Security Data Filters and ACLs (If a hardened access control is required) as the primary approach (see Appendix).

For customers on Xanadu: Alternatively, as a stop-gap solution use a combination of Before Query Business Rules, Allow-if and Deny-Unless ACLs (available from Xanadu release).

Tailored Layouts

Primary Approach: Use **Project Types with custom form views** for projects, and UX View Rules (and View rules for classic form) **for demands** (since Demand Types are not available in the current EWD version).

View Rules and UX View Rules in ServiceNow dynamically control which views users see based on conditions, enhancing usability by showing relevant information to the users. This approach allows you to:

- Present different form layouts based on business unit
- Control field visibility and mandatory status contextually
- Provide tailored user experiences without duplicating forms

Tailored Processes

Primary Approach: Use **Playbooks** for both projects and demands to build distinct end-to-end processes. Playbooks provide a guided, structured approach that helps teams follow standard life-cycles while supporting business unit-specific requirements.

Playbook in Next Experience for Demand Management provides a guided, structured approach to managing a demand from initiation to completion.

Playbooks focus specifically on helping demand teams follow the standard demand life-cycle, confirming every demand progresses consistently and no critical steps are missed. You can define your playbooks according to your requirements.

Playbook for Project is a guided framework that walks project teams through key phases and activities across the project lifecycle. It acts as a structured guide to ensure critical steps are completed, helping maintain governance and consistency without introducing unnecessary complexity.

Define playbooks according to your requirements.

Playbooks enable process configuration, improve and simplify maintainability, and support low-code/no-code development.

Configuration Independence

Primary Approaches:

- **Primary Approaches:** Use **Project Types with custom Dynamic Categories**. This allows different project types to have different sets of custom fields without requiring form duplication (Demand Types are not available in the current EWD version).

- Leverage custom tables when a high number of custom fields is required.

When implementing business unit-specific data requirements:

- Add custom fields to standard tables when requirements are limited
- Utilize dictionary overrides to change field behavior by context
- Implement validation rules specific to business unit processes

Additional Pre-implementation Considerations

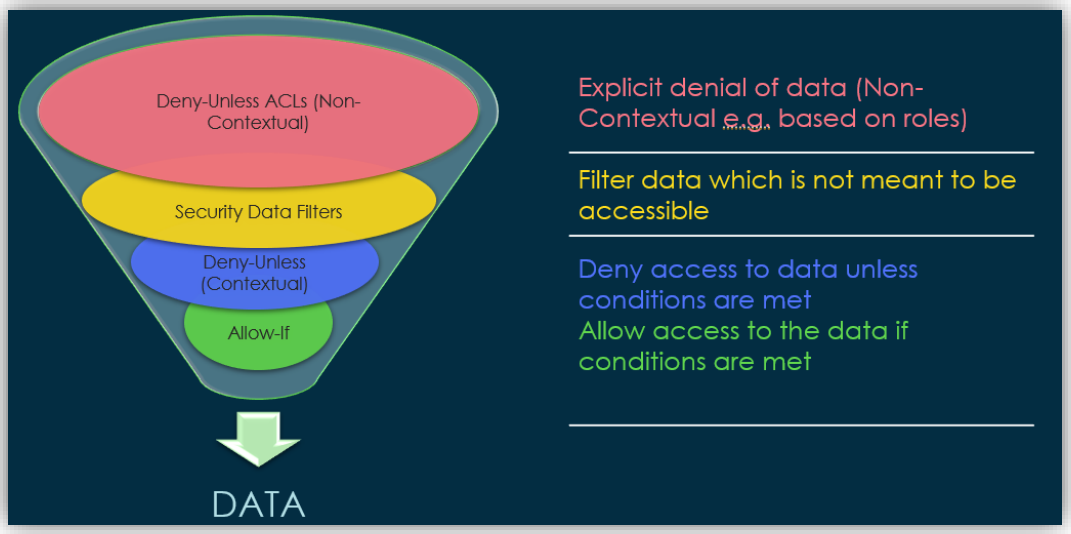
Here are some additional best practices and considerations before you kick-off the EWD journey at your organization

Consideration	Key Actions
Business Value	Carefully consider the Business Value before making any important architectural decisions. Segmenting data and creating multiple configurations creates a large amount of system management and maintenance overhead.
Process	Having a Baseline high-level Process for SPM across the organization will be very beneficial to the long-term support and maintenance of EWD architecture.
Data Model	Define a core data model across the organization, aligned to out-of-the-box capabilities, to allow Enterprise-wide reporting and adoption of existing and future SPM capabilities.
Governance	SPM processes are critical to maintaining stability and managing enhancements. Process and Product Owners must be involved to support and guide decision-making around changes. Additionally, the Platform Owner should be engaged as part of the overall governance structure. It's essential to identify these stakeholders early and involve them continuously to govern the process and provide insight into any platform or process adjustments needed to support the business.
Business Needs	Carefully evaluate Critical Business needs against the cost of implementing and maintaining a segmented process.
Security	Identify and agree upon the Entity attribute for security (e.g., Business Unit, Department, Portfolio, Product) and ensure that this attribute is fulfilled in the required records (e.g., Demand, Project, and Epic).
Customizations	Review and identify opportunities to improve the instance's health for adoption of current and future out-of-the-box capabilities.

Appendix

Below is the list of additional details and resources on various capabilities for EWD

Platform Security Capabilities



For more details on granular access control, please refer to this ServiceNow community video.

1. **Deny-Unless ACLs**

- Available from **Xanadu** release
- Deny-Unless ACLs are evaluated using a "deny-unless" approach. The ACL defines the users who will NOT be denied access. In other words, the user will be denied access unless the role, condition, and script requirements are met.
- **Deny-Unless ACLs will take priority against Allow-If ACLs in ACL Evaluation, as it will be evaluated first.**
- For more details, please refer to the documentation.

2. **Security Data Filters**

- Available from **Yokohama** release
- Security data filters enable access restriction to records based on a user's role or other security attribute-related assertions. These filters ensure only authorized users can view records regardless of how data is accessed.
- Security data filters are applied before a query is executed so restricted data never leaves the database. In contrast, conditional ACLs filter data after a query is executed possibly leaking data.

- Pair security data filters with Deny-Unless ACL to ensure complete security. You will need ACLs to handle use cases like preventing access from the base table.
- For more information, please refer to the documentation.

Security Data Filters for SPM Use Cases

For detailed guidance on using Security Data filters for SPM data separation use cases, please refer to KB1772519 - Managing data separation using data filters and ACLs

Before Query Business Rules

Server-side scripts that run before a database query, used to restrict the data returned. Help to enforce data access policies beyond ACLs. More details at Documentation.

SPM Data Separation

Not recommended, as it's Deprecated from Yokohama

This SPM specific feature helps organizations restrict access to sensitive data based on a lens hierarchy and its leaf node. The approach utilizes query business rules for filtering the data.

ACLs will be used to plug the gaps where query BRs fall short example: Accessing derived table records via base table.

Specific use case like opening project form, creating cost plan, etc. are being optimised for a better user experience.

Handling roll-up and reporting (with some limitations like aggregation)

Only supports the following entities for data separation:

- Project
- Demand
- Project task
- Cost plan
- Cost plan breakdown
- Resource plan

Known Limitations of EWD current version

Partition Data Separation Limitation

The current EWD partitions use Security Data Filters for enforcement. For details on SDF limitations and their impact on data separation, see: https://www.servicenow.com/community/servicenow-ai-platform-articles/need-to-know-principle-implementation-part-4-limitations-of/ta-p/3459814

Demand Types Not available

Demand Types are not available in the current EWD version. Organizations needing tailored demand forms and fields can use UX View Rules (and View rules for classic form). Demand Types will be addressed in future releases.

Agile Tables Not in Partition Scope

Agile-specific tables (stories, epics) are not included in the current EWD version. Organizations using Agile frameworks within SPM will need to manage access control for agile artifacts separately.

Ideas Not in Partition Scope

The Ideas table is not covered by partitions in the current EWD version. Organizations using Ideas across multiple business units will need to manage access control separately.

Strategic Planning Workspace Integration

Partition enforcement in Strategic Planning Workspace is optional and limited in scope. Coverage is limited to planning item versions of project and demand tables, and SPW-native tables (goals, strategic plans) are not partition-scoped.

Resource Management Support

The current EWD version provides phased support for Resource Management capabilities:

Capability	Supported From
Resource Assignments and Resource Allocations	Australia Patch 1 (AP1)
Resource Plan, Requested Allocation, Aggregates	Australia Patch 3 (AP3)