ServiceNow SPM

Enterprise-Wide Deployment

Onboarding Guide: Partitions and Project Types

For ServiceNow Administrators and SPM Implementers

Field	Value
Document version	1.1
Minimum supported release	Zurich (minimum supported patch) | Australia (latest supported release)
Audience	Customer Administrator / SPM Implementer

Note
This guide covers both greenfield (new SPM deployments) and brownfield (instances with existing SPM data) customers. Steps that apply only to one path are clearly labelled. Where steps differ between deployment types, this is clearly labelled within each step. A note in the step indicates this.

1. What EWD Covers (and What It Does Not)

Enterprise-Wide Deployment (EWD) is an SPM-specific capability. It is not a general ServiceNow platform feature. It enables multiple verticals, divisions, or functions to use SPM applications on a single instance, each with targeted configuration.

EWD is organized around four pillars, each supported by specific capabilities available in the platform today.

Pillar	What it means	Current coverage	Delivered by
Security	Restricting which users can see which records. This is achieved through security data filters on partitioned tables, meaning records are filtered at query time based on the user's partition role.	Delivered. Applies to: Projects, Demands, Programs, Portfolios, and associated child tables (cost plans, benefit plans, resource plans, baselines, RIDAC). For a full list see appendix.	SPM Enterprise-Wide Deployment (sn_spm_ewd)
Tailored Layout	Custom form views and field visibility per Project Type.	Delivered for Projects only, via Project Types in Project Workspace.	Project Workspace (sn_pw)
Tailored Process	Custom business logic and workflows per type or vertical.	Supported through Project and Demand playbooks	sn_pw (Project Types as a criteria for Playbooks) and Demand playbook based on a demand attribute as criteria.
Configuration Independence	Custom fields per type, achieved through Dynamic Schema.	Custom fields are available per Project Type. This is part of the Tailored Layout capability delivered by Project Workspace.	Project Workspace (sn_pw)

Important

EWD Partitions use security data filters only, not ACLs. Security data filters have inherent limitations that you should understand before going live.

Refer to the ServiceNow Community article on this topic, linked in reference section at the end of this document.

Note

Partitions and Project Types are independent. Configuring Partitions does not require any changes to Project Types, and vice versa. Project Types, Playbooks, and intake configuration for the new vertical is covered in later sections.

1.1 Tailored Process: Best Practice Approach

Tailored Process use cases are supported through a combination of Project Types and Project Playbooks, and Demand playbooks based on a demand attribute. The approach below is a best practice suggestion.

Best practice suggestion

Projects: use Project Types (in Project Workspace) combined with Playbooks.

Each Project Type can be associated with a unique Playbook, giving each vertical a distinct guided workflow for project execution.

Demands: use Playbooks combined based on a demand attribute.

Playbooks guide the demand lifecycle. A dedicated Catalog Item for each demand by vertical controls the intake form, pre-populates partition criteria fields at submission, and the attribute used as playbook criteria to route demand into the correct process.

Programs and Portfolios: no tailored process mechanism is recommended in the current EWD version. These record types are data-separated via partitions only.

Full configuration guidance for each component is in Section 4.

2. Pre-requisites: Release Compatibility and Applications

Confirm that your instance meets the release requirements and that the correct applications are installed at the right version before starting any configuration. These are hard gates. Configuration on an unsupported release or outdated application version will produce unpredictable results.

2.1 Release compatibility

ServiceNow release	Minimum patch required	Notes
Zurich	See release notes	Earliest supported release.
Australia	See release notes	Latest supported release at time of writing. Recommended for new deployments.

2.2 SPM Enterprise-Wide Deployment (sn_spm_ewd)

This application delivers the Partitions capability. It is not bundled with any existing SPM application and must be installed separately from the ServiceNow Store.

Attribute	Value
Application name	SPM Enterprise-Wide Deployment
Scope	sn_spm_ewd
What it delivers	Partition records, partition criteria configuration, partition roles, the stamping scheduled job, and the Sync partition details UI action
Installation	SPM Enterprise-Wide Deployment is automatically installed with Project Workspace. For existing deployments, ensure Project Workspace is updated to the latest version first (see Section 2.3), then verify that sn_spm_ewd is installed and up to date.

2.3 Project Workspace (sn_pw)

Project Workspace is the core SPM application that customers use for project management. Project Types, custom fields per type, and Playbooks for Projects are all delivered as part of it. The reason it is called out here as a pre-requisite is that customers on existing deployments need to ensure they are on the latest version before starting EWD configuration.

Attribute	Value
Application name	Project Workspace
Scope	sn_pw
Key capabilities	Project Types (project_type table), form layout per type, custom fields via Dynamic Schema (please see references section for more details on Dynamic schema), Playbooks for Projects
Action required - new deployment	Install from the ServiceNow Store. Project Workspace is required for SPM project management.
Action required - existing deployment	Update to the latest available version for your target release before starting EWD configuration. Test the update in sub-production before applying to production.

Important

If Project Workspace (sn_pw) is already installed on your instance, do not update it directly in production. Test the update in a sub-production environment first to identify any conflicts with existing customisations, then apply to production.

2.4 Strategic Planning/Portfolio Planning (Optional)

Strategic Planning/ Portfolio Planning helps you plan work for your products and portfolios in the desired delivery perspective.

Attribute	Value
Application name	Strategic Planning/Portfolio Planning (SPM Pro/SPM Std)
Scope	sn_apw_advanced/sn_align_ws
Key capabilities	Roadmap, portfolio planning
Action required - new deployment	Install from the ServiceNow Store.
Action required - existing deployment	Update to the latest available version for your target release before starting EWD configuration. Test the update in sub-production before applying to production.

3. Pre-requisites: Design Decisions and Data Preparation

Work through all decisions and checks in this section before starting configuration. These are difficult to change once configuration is underway, as some changes require re-running the partition stamping job across all tables.

3.1 Required role

All partition configurations must be performed by a user with the ewd_admin role. This role is scoped to partition configuration only and does not carry any other elevated privileges. There is no separate partition admin role.

3.2 Partition design decisions

Document the following for every vertical you are onboarding before creating any records on the instance. This includes the existing vertical (Vertical A) if it does not yet have a partition.

Decision	What to determine
Partition name and label	A technical name (e.g., vertical_b) and a human-readable label (e.g., Vertical B). Decide for every vertical.
Partition criteria field	The single field on each partitioned table whose value identifies which partition a record belongs to. Must exist on all partitioned tables and must be populated on all records that need to be partitioned. See Section 3.3.
Partition criteria value(s)	The specific field value(s) that map each partition. For example, Business Unit = Vertical A for the first partition, Business Unit = Vertical B for the second.
Partition role name	A unique role per partition to be created and mapped to that partition for data access control.
Users and groups	Which users and groups should be assigned each partition role, including any changes to existing user assignments for Vertical A.
Cross-vertical access	Any users who need visibility across multiple partitions (e.g., central PMO). Two options: assign individual partition roles for each vertical they should see, or assign the ewd_pmo role which grants access to all partitions, including any created in the future.

3.3 Partition criteria field: data quality check

The partition criteria is a filter condition evaluated per record at query time. The field you select must satisfy all of the following before you proceed to configuration:

- It exists on all partitioned tables in scope: pm_project, dmn_demand, pm_program, pm_portfolio.
- It carries a valid, non-null value on every record that needs to be partitioned across all of those tables.

Important
Do not proceed to next section until this check is complete and all gaps are resolved.

Run a report or background script to verify field coverage across all partitioned tables. Any existing record that does not have a value for the criteria field will not be assigned to any partition when the stamping job runs, making it invisible to all partition-role users. Populate missing values on affected records before proceeding.

If you have no existing SPM data, this check does not apply and can be skipped.

3.4 Tailored Layout and Tailored Process design decisions

Work through these decisions before starting configuration. Decisions are grouped by capability and record type.

Tailored Layout

- **Projects**: What Project Types are needed per vertical (e.g., Vertical A - Capital Project, Vertical B - IT Project)? Which form views, fields, and custom fields should differ between types?
- **Demands**: A dedicated intake Catalog Item per vertical serves as the Tailored Layout mechanism to create a demand and ensure the attribute used for tailored process and layout is populated correctly. Decide what fields, sections, and default values each vertical's intake form should present during demand creation. Leverage UX views (UI views for classic form) to tailor the layout accordingly. Please see the reference section for detailed documentation links.

Tailored Process

- **Projects**: Which Playbook should govern the project process for each Project Type? Define the stages, activities, and conditions per vertical.
- **Demands**: Should each vertical have a dedicated Playbook for the demand lifecycle? Define the stages, approval steps, and activation conditions per vertical. Note that the intake Catalog Item configured under Tailored Layout can also be used to make the attributes used to trigger a Playbook is correctly defined. Please see the reference section for detailed documentation links.

New SPM deployments
If you have no existing SPM data, most of these decisions can be refined iteratively after initial setup.

3.5 Enable internal integration (Optional)

If you are planning to use Strategic Planning/Portfolio Planning, please enable the internal integration. For more details on enabling internal integration, please refer to this documentation: https://www.servicenow.com/docs/r/it-business-management/portfolio-planning/fin-enable-integration-planning-item-ppw.html

4. Step-by-Step Configuration

Complete Sections 2 and 3 in full before starting here.

Steps 1 to 8 configure Partitions, delivered by sn_spm_ewd. Step 9 to configure Project Types, and Playbooks.

> **Note**
> Run Steps 1 to 8 for every vertical you are onboarding, including the existing vertical if it does not yet have a partition record.

Step 1: Install or Update Applications

Before any configuration, confirm both applications are at the latest version on your instance.

1. Navigate to System Applications > All Available Applications > All.
2. Search for SPM Enterprise-Wide Deployment (scope: sn_spm_ewd). For new deployments, this will be installed automatically alongside Project Workspace. For existing deployments, update Project Workspace first, then confirm sn_spm_ewd is installed and at the latest version.
3. Search for Project Workspace (scope: sn_pw). If already installed, update it to the version for your target release. If not yet installed, install it fresh.
4. Verify release compatibility from Section 2.1 is met before proceeding further.

> **Important**
> If sn_pw is already installed, test the update in sub-production before applying before applying to production. Do not skip this step.

> **New SPM deployments: skip this step**
> If this is a new SPM deployment, install both applications fresh. No data migration or update testing is required.

Step 2: Verify Data Quality for Partition Criteria Field

Before creating any partition configuration, confirm that the field you identified in Section 3.3 as the partition criteria field is fully populated across all partitioned tables. This step must be completed before Step 3.

- Run a report or background script querying pm_project, dmn_demand, pm_program, pm_portfolio tables for records where the criteria field is null or empty.
- For each table, the count of unmatched records should be zero before you proceed.
- If gaps exist, populate the criteria field on affected records. Depending on the volume, this may need to be done via a data fix script run by a system administrator.

Important

Do not proceed to Step 3 until the null count is zero across all partitioned tables.

Proceeding with unresolved gaps will result in those records becoming invisible to partition-role users after the sync job runs in Step 4, with no automatic recovery path.

New SPM deployments: skip this step

Not applicable for new SPM deployments with no existing data.

Step 3: Create Partitions

Navigate to the EWD configuration area and create a partition record (sn_spm_ewd_partition table) for each vertical. Do this for all verticals at once, including the existing vertical if it does not already have a partition record.

Field	Description
Name	Technical identifier - lowercase, no spaces (e.g., vertical_a, vertical_b).
Label	Human-readable display name (e.g., Vertical A, Vertical B).
Partition Role	Leave blank for now. Populate after completing Step 4.

Step 4: Create Partition Roles and Map Them

Each partition requires its own unique role for data access control. Create a role for every partition created in Step 3.

- Navigate to System Security > Roles and create a new role for each vertical (e.g., vertical_a_user, vertical_b_user).
- Return to each partition record from Step 3 and set the Partition Role field to the corresponding newly created role.

Note

Partition roles are solely for data access control. The ewd_admin role is a separate role for performing partition configuration and must not be confused with partition roles.

Step 5: Configure Partition Criteria for Each Table

For each partition and each table in scope, open the corresponding sn_spm_ewd_partitioned_table record and define the partition criteria condition. This condition identifies which records belong to this partition.

Tables requiring partition criteria configuration:

- pm_project
- dmn_demand
- pm_program
- pm_portfolio

Child records (cost plans, benefit plans, resource plans, baselines, RIDAC) are automatically stamped with the partition of their parent record. You do not need to configure partition criteria on child tables directly.

Example: if the partition criteria field is Business Unit, the condition for the Vertical B partition on each table would be: Business Unit is Vertical B.

> **Important**
>
> Save the criteria condition on each record, but do not click Sync partition details yet.
>
> That button triggers the stamping job which must be run in the correct sequence in Step 6.
>
> Triggering it out of sequence or before all criteria are configured will produce inconsistent stamping results across tables.

Step 6: Stamp Existing Records | Existing deployments only

> **New SPM deployments: skip this step**
>
> New SPM deployments: skip this step. Records created after partition criteria are saved will be stamped in real time. No manual sync is required.

Existing records on your instance were created before partitions existed and carry no partition stamp. The Sync partition details job must be triggered for every table and every partition to retroactively stamp all existing records.

How to trigger the sync

Once partition criteria are saved on a sn_spm_ewd_partitioned_table record, a button labeled Sync partition details appears on that record's form. This button is visible only when:

- The record has been saved.
- You are logged in as a user with the ewd_admin role.
- A partition criteria condition has been set on the record.
- No other sync job is currently running (enforced via system properties sn_spm_ewd.stamp_job_running and sn_spm_ewd.sync_partitioned_table_id).

Clicking Sync partition details triggers the on-demand scheduled job Update existing records with partition details. This job clears the partition config cache and calls EWDPartitionSyncSNC.syncForPartitionTable(), which evaluates the partition criteria against existing records in the target table and stamps matching records with the correct partition reference.

> **Note**
>
> Alternatively, after all partition criteria updates are completed and saved across all partitioned tables, run the scheduled job **"Update existing records with partition details"** to **stamp the correct partitions across all partitioned tables in one pass**. This avoids having to click Sync partition details separately for each partitioned table record.

Sync sequencing - one job runs at a time

The system enforces single-job execution. Wait for each run to complete before triggering the next. Work through every table for every partition in this order:

Run	Table	Repeat for each partition
1	pm_project	Partition A, then Partition B

2	dmn_demand	Partition A, then Partition B
3	pm_program	Partition A, then Partition B
4	pm_portfolio	Partition A, then Partition B

Validate after each sync run

- Sample records from the target table and confirm the partition reference field is populated with the expected value.
- Identify any records with no partition assignment. If found, investigate whether the criteria field value was missing or null on those records.
- Resolve gaps: populate the criteria field on affected records, then re-trigger the sync for that table before moving to the next run.

> **Important**
> Do not move to Step 7 until all sync runs are complete and all tables show zero records with an unassigned partition. Assigning roles in Step 7 before stamping is complete will result in users being unable to see records that should be accessible to them.

Step 7: Assign Partition Roles to Users and Groups

Assign partition roles to all users and user groups. This is the step that makes the partition data separation visible to end users for the first time.

- Vertical A users: assign the Vertical A partition role only. If this is an existing deployment, review current user assignments and confirm they are correctly aligned to Vertical A.
- Vertical B users: assign the Vertical B partition role only.
- Cross-vertical users (e.g., enterprise portfolio managers, central PMO): either assign individual partition roles for each vertical they should see, or assign the ewd_pmo role which automatically grants access to all current and future partitions.

> **Note**
> A user with no partition role will not see any partitioned records, even if they hold other SPM roles.
> Always verify role assignment when onboarding new users to any vertical.
> Any records which are not part of any partition will be visible to all users irrespective of partition role.

Step 8: Validate Partition Data Separation

Before configuring any Tailored Layout or Tailored Process components, validate that partition data separation is working correctly for all verticals. Resolve any issues at this layer before adding complexity.

Vertical B user

- Log in as a test user with the Vertical B partition role only.
- Confirm only Vertical B projects, demands, programs, and portfolios are visible.
- Confirm child records (cost plans, resource plans, benefit plans, baselines) are scoped correctly to Vertical B.
- Create a new project and demand. Confirm both are stamped with the Vertical B partition on save.

Vertical A user

- Log in as a test user with the Vertical A partition role only.
- Confirm their view of existing records is unchanged from before EWD was configured.
- Confirm no Vertical B records are visible.

Cross-vertical user

- Log in as a test user with both partition roles assigned.
- Confirm records from both verticals are visible.

> **Important**
> If any records that should be visible to a partition-role user are missing, check whether those records have a partition assignment. Records created before the sync job ran, or records whose criteria field was null, will have no partition assignment and will be invisible to partition-role users. Resolve by populating the criteria field on those records and re-triggering the sync for the relevant table.

Step 9: Configure Project Types and Playbooks for Projects | Tailored Layout and Tailored Process for Projects

Follow this step if you are configuring a different form layout, field set, or guided process for the new vertical's Projects. This step uses capabilities already present in Project Workspace and is independent of partition setup.

Project Types - Tailored Layout

1. Navigate to All > Project Administration > Project Types.
2. Create a new Project Type for Vertical B (e.g., Vertical B - Standard Project).
3. Configure the form layout and field visibility for this type.
4. Add any custom fields for this type via Dynamic Schema.
5. Ensure projects created for Vertical B are assigned this Project Type on creation.

Playbooks for Projects - Tailored Process (best practice)

1. Navigate to Workflow Studio and create a Playbook for the Vertical B project lifecycle.
2. Define the stages, activities, and conditions that represent Vertical B's project process.
3. Associate the Playbook with the Vertical B Project Type so that projects of this type automatically activate the correct Playbook on creation.

Refer to the official ServiceNow documentation for Playbooks in Project Workspace:
https://www.servicenow.com/docs/bundle/australia-strategic-portfolio-management/page/product/project-management/concept/playbooks-project-workspace.html

> **Note**
> Project Types are a core Project Workspace capability. They control layout and custom fields. Associating a Playbook with a Project Type for per-vertical process differentiation is a best practice suggestion.

Step 10: Final End-to-End Validation

Once all required steps are complete, run a final validation pass covering every component that has been configured.

Tailored Layout

- Confirm the Vertical B Project Type is selectable when creating a new project.
- Confirm the correct form layout and custom fields appear for that type.

Tailored Process

- Create a new Vertical B project. Confirm the Vertical B Playbook activates automatically.
- Step through at least the first stage of the Playbook to confirm it is correctly configured.

Existing Vertical A users - final check

- Log in as a Vertical A user and confirm all existing records remain accessible and unchanged.
- Confirm no Vertical B records are visible.
- Confirm any existing Vertical A workflows, playbooks, or catalog items are unaffected.

5. Key Limitations

Limitation	Detail
Partitions use security data filters	EWD Partitions use security data filters only, not ACLs. Security data filters have inherent limitations - review the ServiceNow Community article before go-live: https://www.servicenow.com/community/servicenow-ai-platform-articles/need-to-know-principle-implementation-part-4-limitations-of/ta-p/3459814
Tailored Process: current capabilities	Project Types and Playbooks for Projects, and Playbooks with intake Catalog Items for Demands, support Tailored Process use cases. Associating these capabilities per vertical is a best practice suggestion.
Project Types for Projects only	Tailored Layout and custom fields via Project Types are available for Projects only. Demands, Programs, and Portfolios do not support Project Types in the current EWD version.
Playbooks for Projects and Demands only	Playbooks are supported for Projects and Demands. Programs and Portfolios do not have Playbook support in this context.
No EWD coverage for Ideas	Ideas are not covered by in the current EWD version.
No decentralised administration	All partition configuration is performed centrally by ewd_admin users. Individual verticals cannot configure or manage their own partitions. This is not on the near-term roadmap.
Strategic Planning / Portfolio Planning workspace scope	Partition enforcement in Strategic planning/portfolio planning workspace applies only to the planning item versions of project and demand tables, and only when the internal integration is enabled.
No separate app navigator per team	EWD does not provide a separate application navigator per vertical in in the current EWD version.
EWD is SPM-specific	Partitions created by EWD apply only to SPM tables. They are distinct from ServiceNow domain separation (a general platform capability). The two must not be conflated.

6. References

ServiceNow Community - Enterprise-wide Deployment recommendations and best practices:

https://www.servicenow.com/community/spm-articles/enterprise-wide-deployment-recommendations-and-best-practices/ta-p/3265572

ServiceNow Product Documentation - SPM Enterprise-wide deployment:

https://www.servicenow.com/docs/r/it-business-management/ewd-landing-page.html

ServiceNow Product Documentation - Playbooks in Project Workspace:

https://www.servicenow.com/docs/r/it-business-management/project-workspace/playbooks-in-pw.html

https://www.servicenow.com/docs/r/it-business-management/project-workspace/use-playbooks-pw.html

https://www.servicenow.com/docs/r/it-business-management/project-workspace/configure-playbooks-pw.html

ServiceNow Product Documentation - Playbooks in Demand Management:

https://www.servicenow.com/docs/r/it-business-management/strategic-planning/playbooks-in-demand-workspace.html

ServiceNow Product Documentation - Service Catalog Management:

https://www.servicenow.com/docs/r/servicenow-platform/service-catalog/service-catalog.html

ServiceNow Community - Need-to-know Principle Implementation, part 4: Limitations of Security Data Filters and ACLs:

https://www.servicenow.com/community/servicenow-ai-platform-articles/need-to-know-principle-implementation-part-4-limitations-of/ta-p/3459814

Dynamic schema:

https://www.servicenow.com/docs/r/platform-administration/dynamic-schema.html