

Integrating TBM & ServiceNow CSDM

We will begin shortly!



Matt Temple
Transformation Excellence
Manager, Accenture



Michael Enslein
Sr. Business Analyst, Tenet
Healthcare



Are your TBM and CSDM
wandering in the woods apart?

How do you bring them
together?

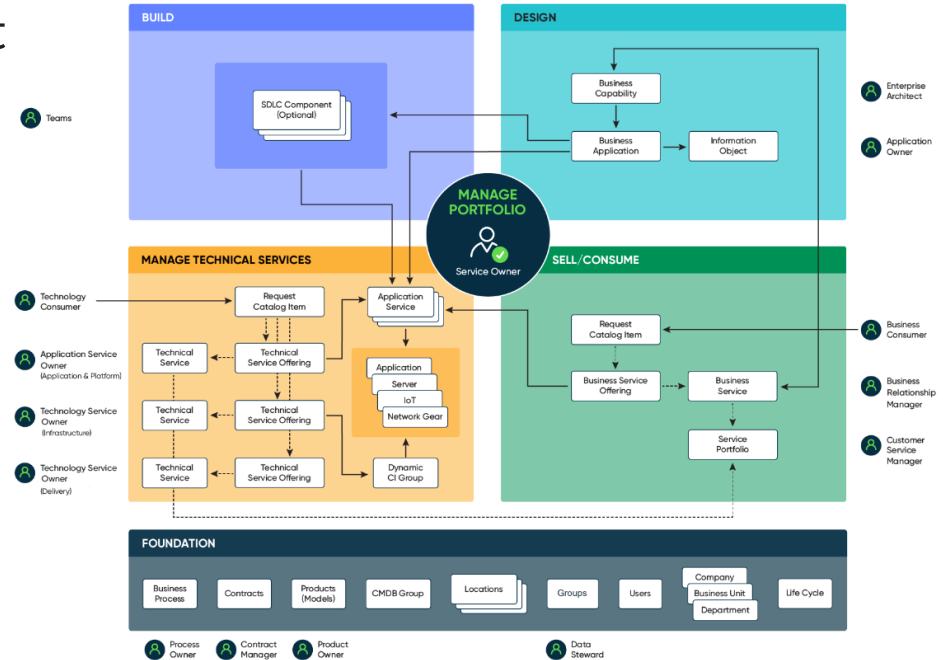
Well buckle up! We will
navigate you to a path where
they can walk together.



ServiceNow's Common Service Data Model (CSDM)

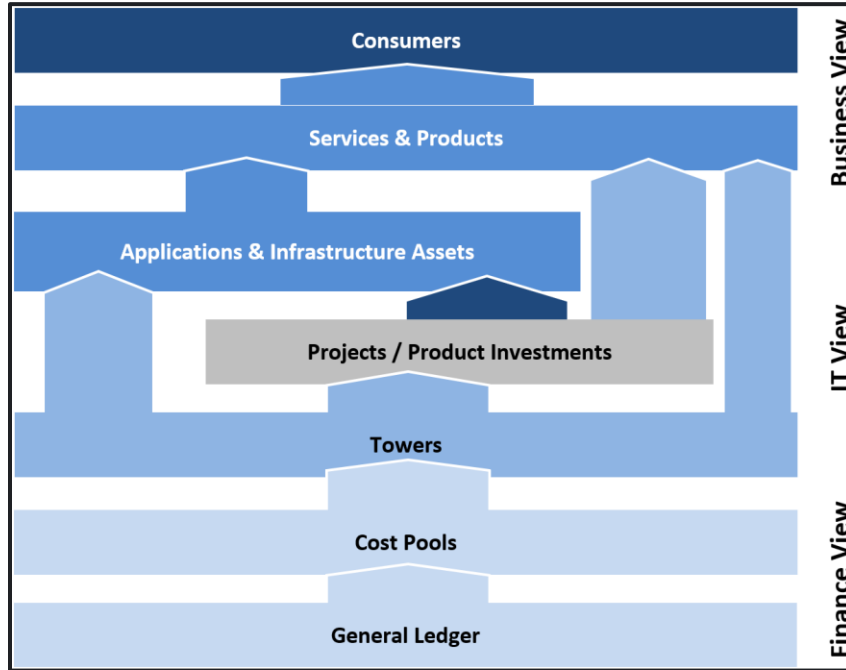
A proprietary standard and shared set of service-related definitions across **ServiceNow** products and platform that will enable and support true service level reporting while providing prescriptive guidance on service modeling within the **CMDB**.

The data model is a **CMDB** framework across **ServiceNow** products and platform that will enable and support multiple configuration strategies.



- Lemm, Scott. "CSDM 4.0 Draft White Paper." ServiceNow, 18 Jan. 2022.

TBM Standard Model



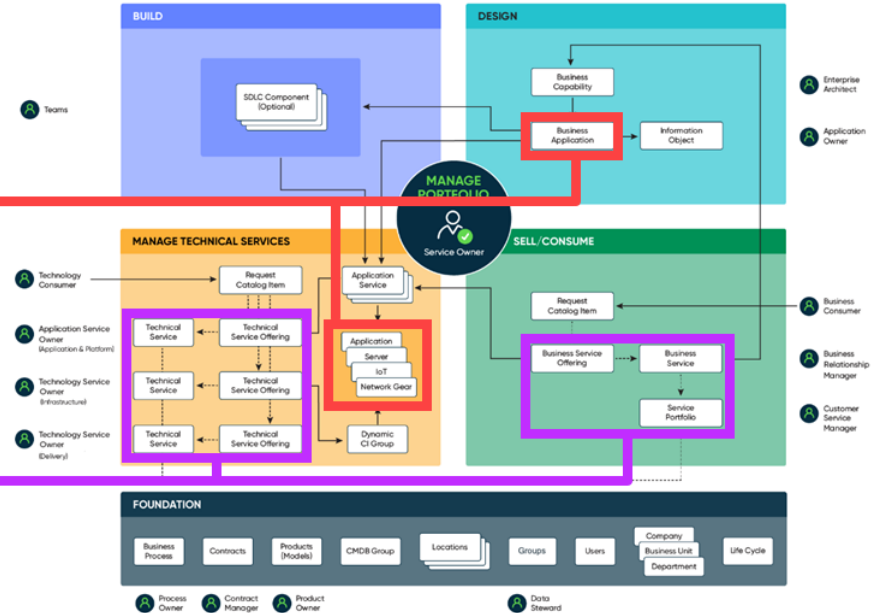
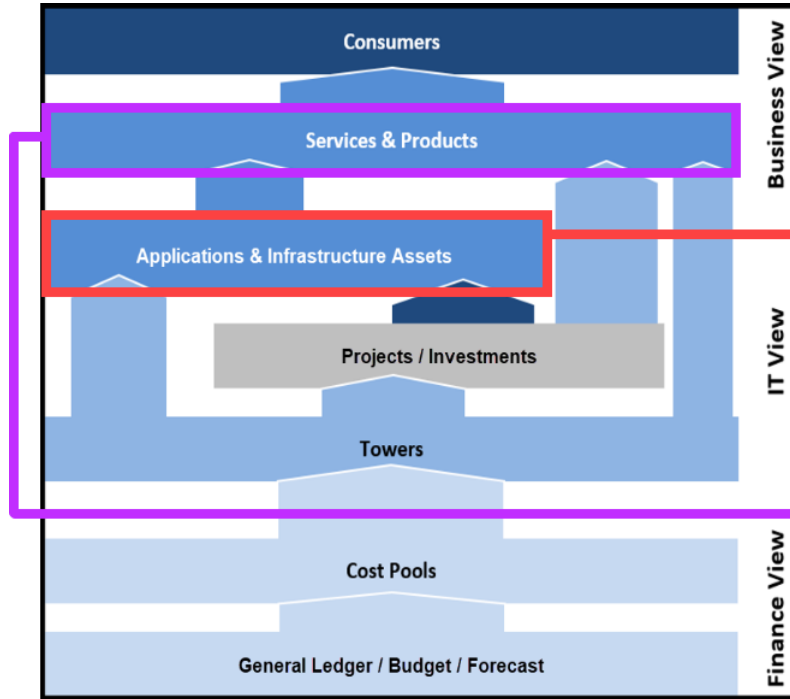
TBM is a value-management framework instituted by CIOs, CTOs, and other technology leaders.

TBM provides a standard taxonomy to describe cost sources, technologies, Technology resources, and solutions.

The taxonomy provides the ability to compare technologies, resources, and solutions to peers and third-party options.

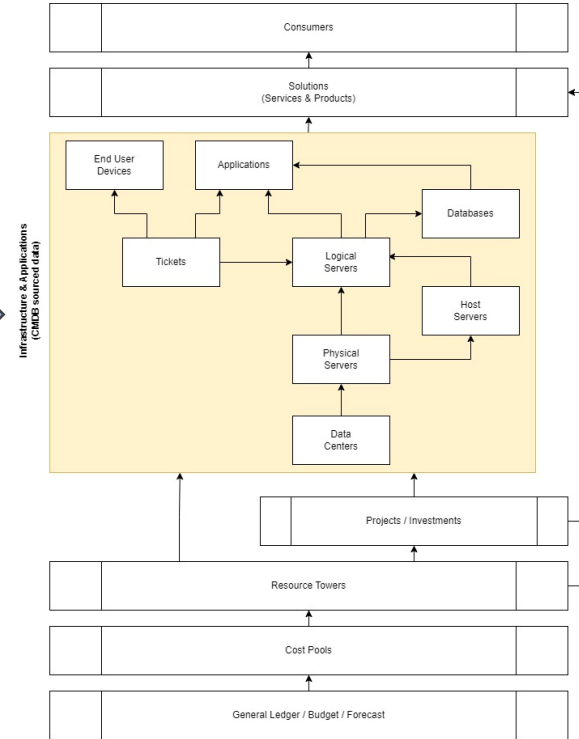
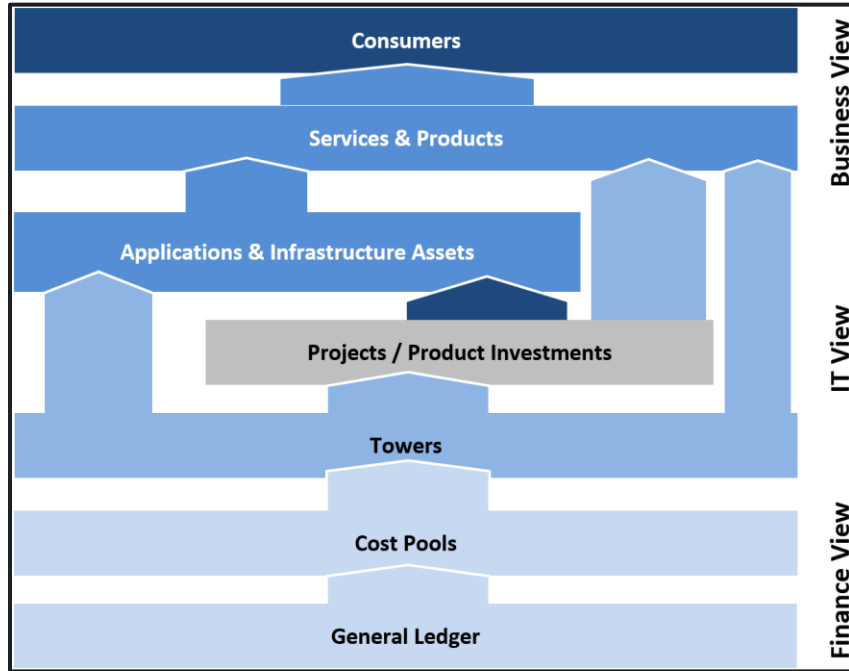
TBM and CSDM

Primary Points of Integration



Taking a closer look...

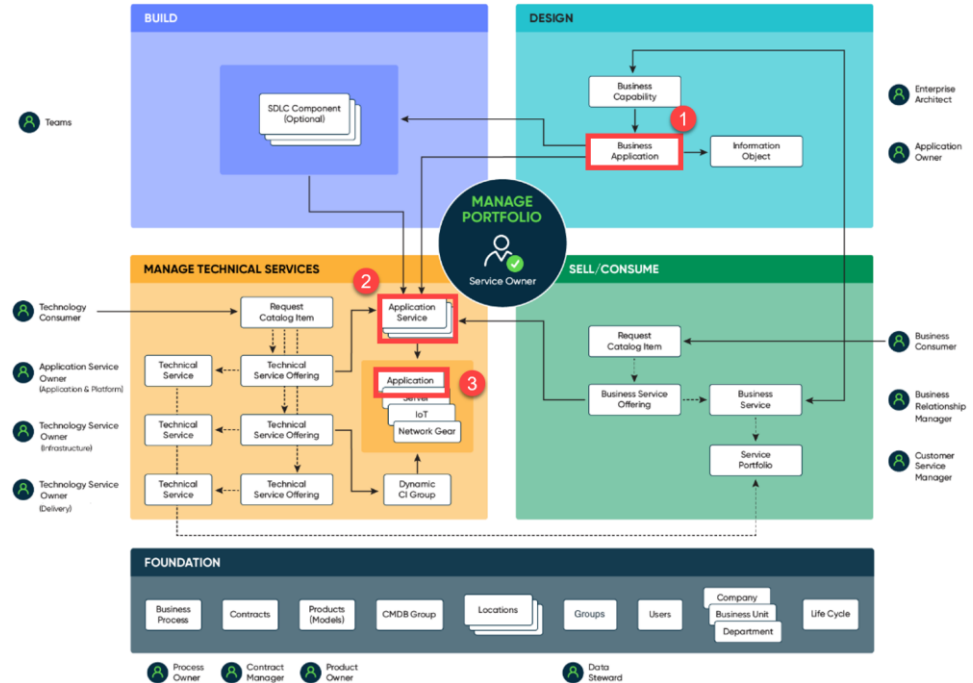
Applications & Infrastructure



Which Application table?

ServiceNow's CMDB contains three application record types:

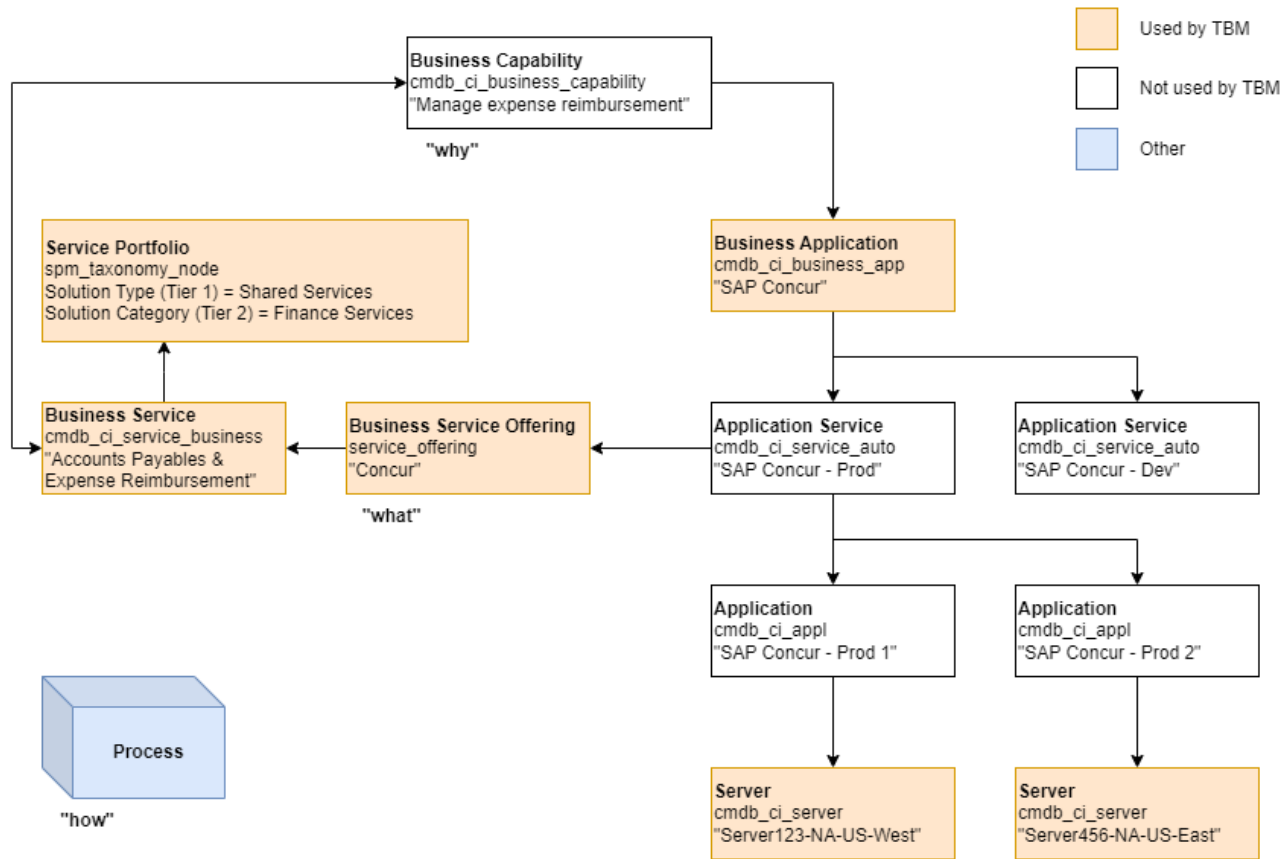
- 1. Business Application**
(cmdb_ci_business_app)
The table contains a logical listing of applications. A single record represents all software and infrastructure environments configured to provide business functionality. Business Applications records are not directly linked to Incidents, Problems, or Changes, and are not version specific. For this reason, they are considered non-operational records. Examples of Business Application records are "SAP Concur" and "Informatica Test Data Management".
- 2. Application Service**
(cmdb_ci_service_auto)
A logical representation of a deployable Business Application and all related software and infrastructure assets. Examples of Application Service records are "SAP Concur – Prod", "SAP – Concur – Dev", "Informatica TDM – Prod – NA", "Informatica TDM – Prod – EU", and "Informatica TDM – Dev".
- 3. Application**
(cmdb_ci_appl)
A Configuration Item (CI) record type representing a deployed instance of an Application Service. The installed bits & bytes. For each deployment of the Application Service, a separate CI record is created and related to the server or end user device asset that it's installed on.



Mapping Data Sources

CSDM Object Name	ServiceNow Table Name	TBM Alignment	Comments
Business Application	cmdb_ci_business_app	Applications	Logical (normalized) listing of all applications throughout the enterprise (including Technology).
Incidents Tickets	incident	Tickets	Combine with other ticket data.
Requests Tickets	sc_request	Tickets	Combine with other ticket data.
Change Tickets	change_request	Tickets	Combine with other ticket data.
Problem Tickets	problem	Tickets	Combine with other ticket data.
Tasks	task_ci	Tickets	Combine with other ticket data.
Relationships	cmdb_rel_ci svc_ci_assoc	SEE COMMENTS	Used to identify relationships to other assets, applications, and solutions. Not used as an object in TBM models.
Computers	cmdb_ci_computer	End User Devices	Any computer not tracked as a server is considered an end user device.
Servers	cmdb_ci_server	Servers	
Databases	cmdb_ci_database cmdb_ci_db_instance	Databases	
Data Centers	cmdb_ci_datacenter cmdb_ci_computer_room cmdb_ci_zone cmdb_ci_rack	Data Centers	
Other Infrastructure CIs	* - various	(various)	Additional assets can include network components, storage, mainframes, and others. Identify and use tables that meet your needs.
Technical Service	cmdb_ci_service_technical	Solution Name	Register standard TBM Solution Names for technical solutions into this CMDB table.
Technical Service Offering	service_offering	Solution Offering	Filter data rows where [Service Classification] equals "Technical Service".
Business Service	cmdb_ci_service_business	Solution Name	Register standard TBM Solution Names for business solutions into this CMDB table.
Business Service Offering	service_offering	Solution Offering	Filter data rows where [Service Classification] equals "Business Service".
Service Portfolio	spm_taxonomy_node	Solution Type & Category	Register standard TBM Solution Category & Type into this CMDB table.

1. Locate the CSDM object to include in your TBM model.
2. Identify the ServiceNow table name.
3. Load and process the data into your TBM model.

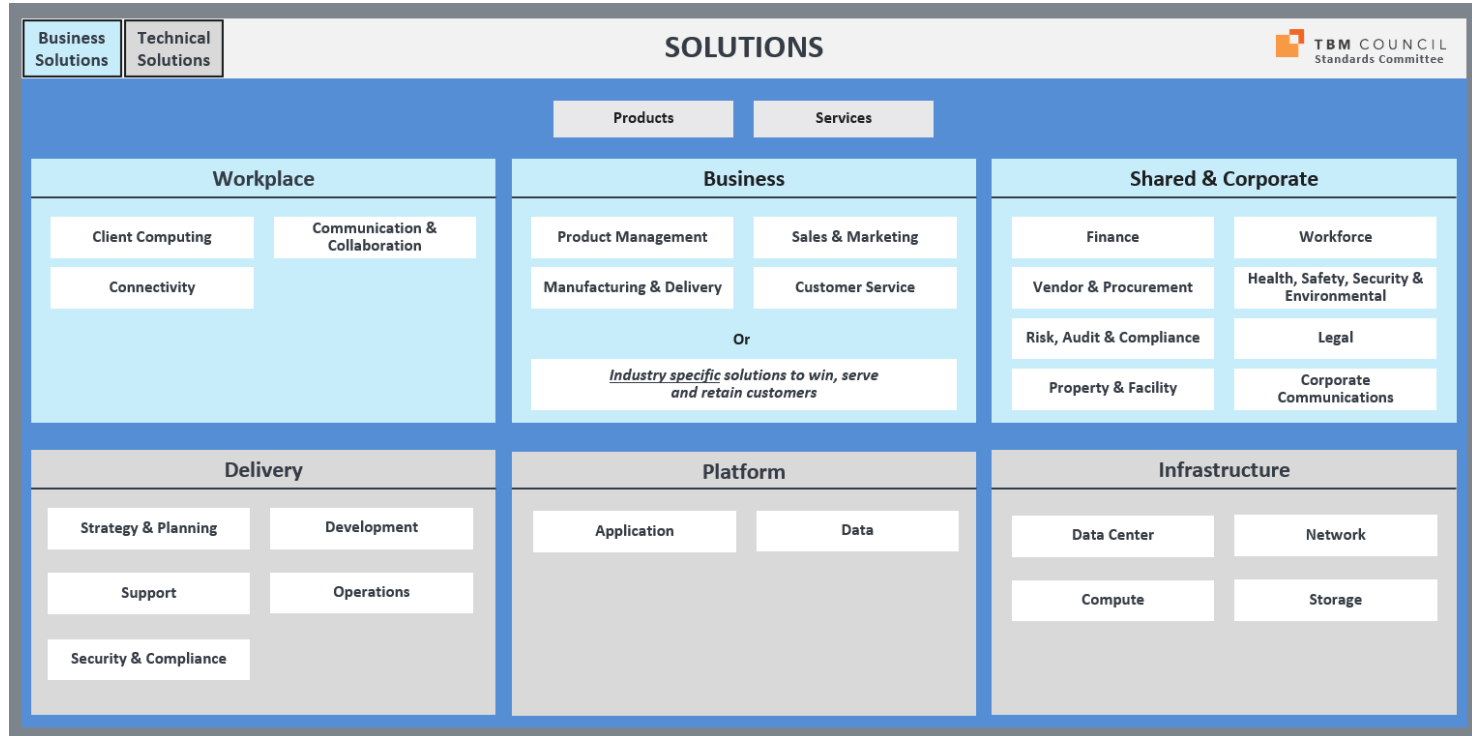


Continued Guidance

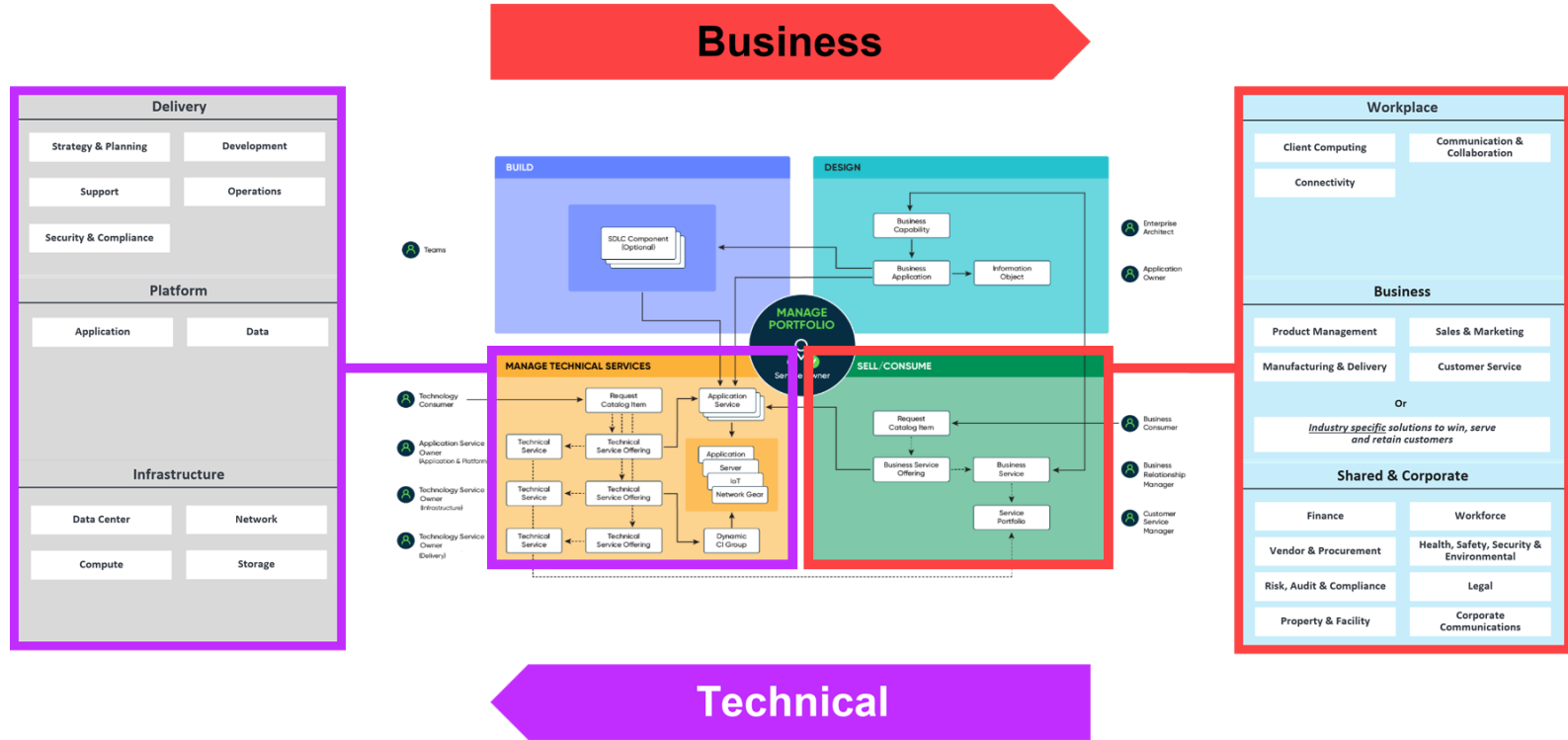
TBM Solutions Taxonomy



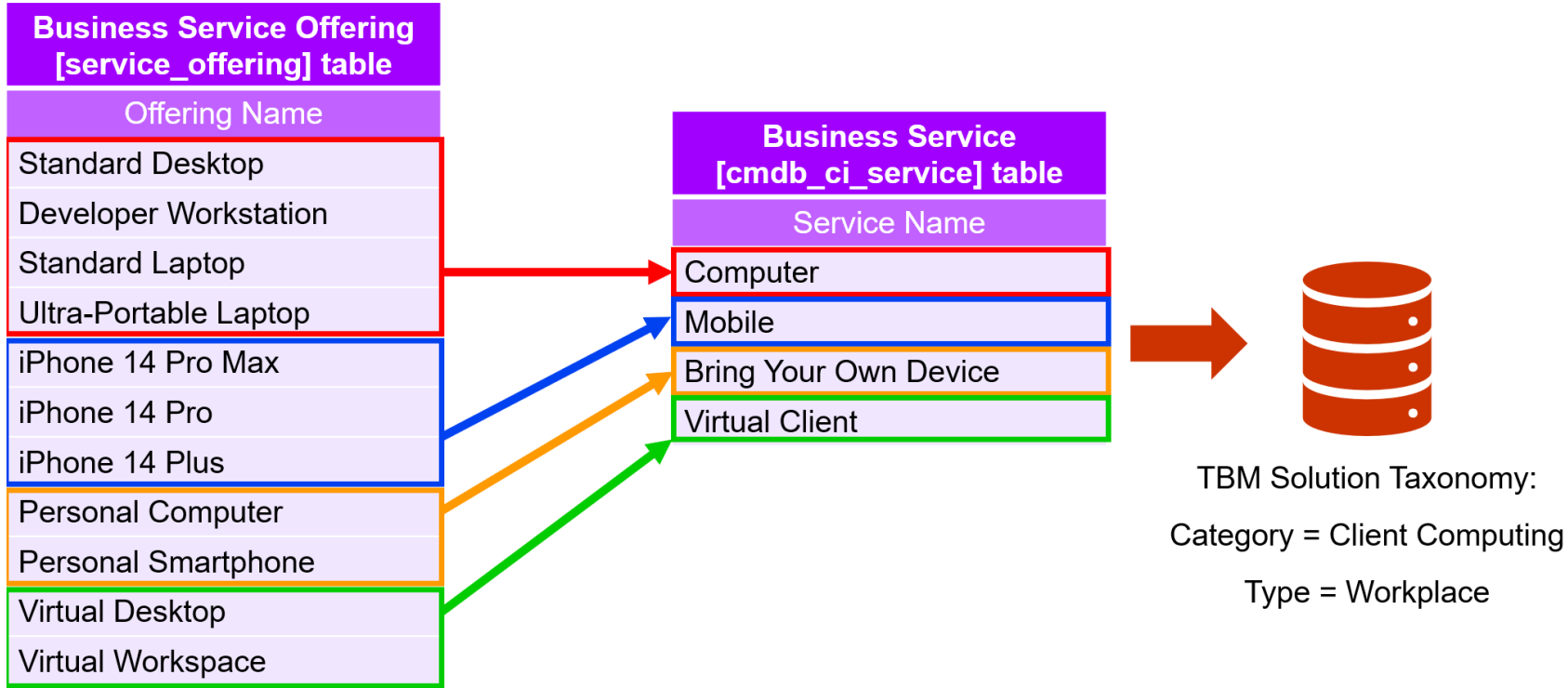
The TBM Solution Taxonomy



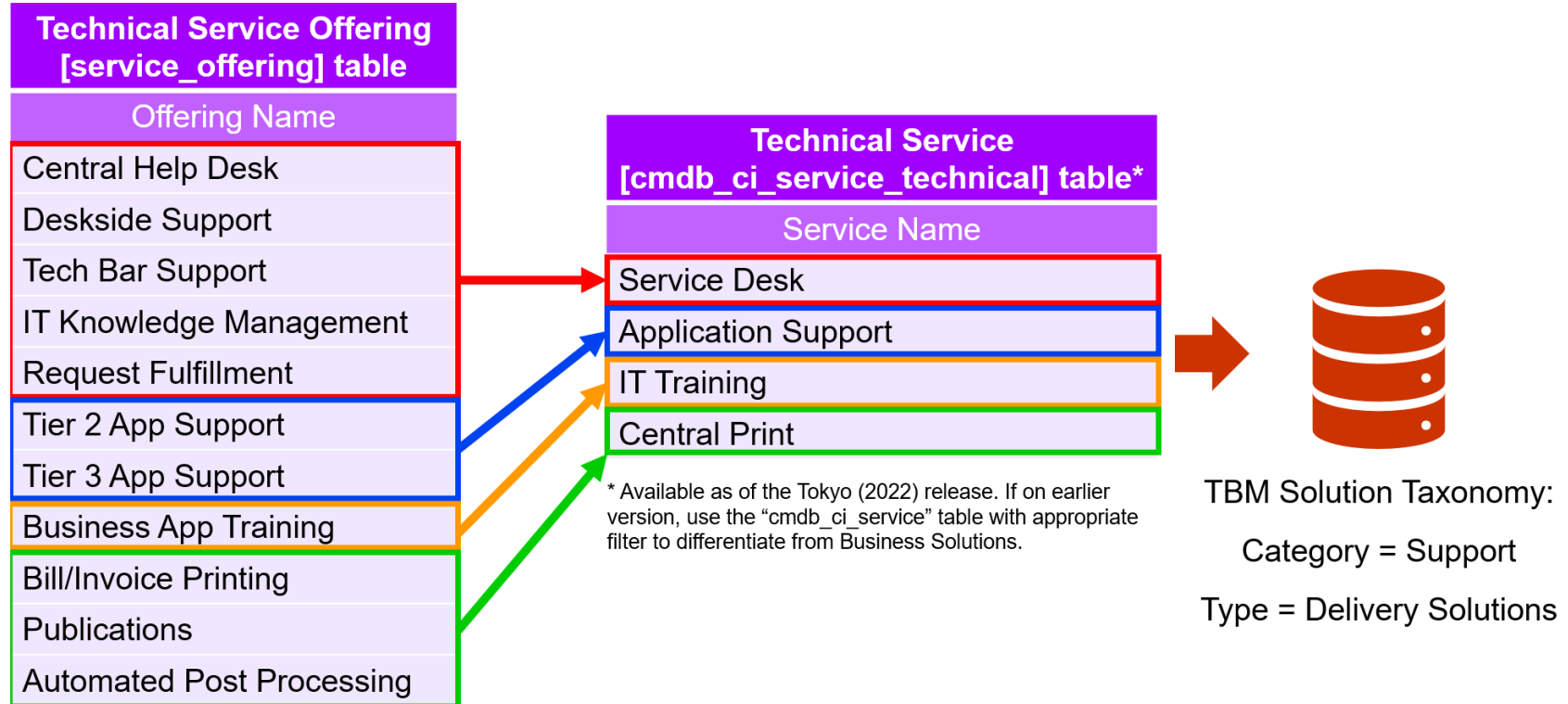
TBM Solutions Taxonomy Alignment with CSDM



Example Roll-up Business Service Offerings



Example Roll-up Technical Service Offerings



Expand Beyond the Standard Taxonomy

OPTION #1

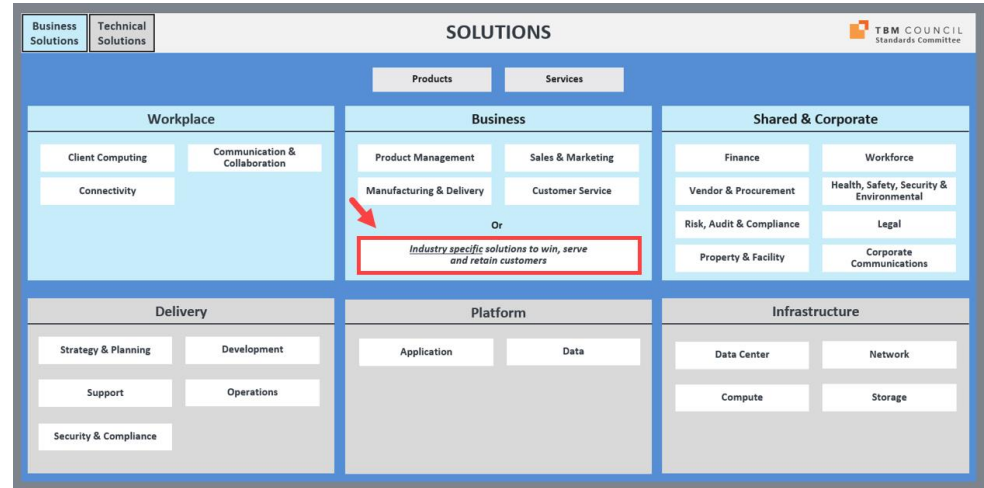
Incorporate one of the TBM Taxonomy Extensions. As of this document's publish date the following extensions are available for download from the TBM Council (www.tbmcouncil.org/learn-tbm/tbm-taxonomy):

- State Government
- Insurance
- Banking
- Healthcare
- Manufacturing

OPTION #2

Create new elements to reflect your organization's unique solutions.

It's unlikely you would create a new Solution Type, so the best place to start is to classify your Offering. In most cases, your Offering would be best placed somewhere within the "Business" Solution Type, but your organization must decide the best fit.



Standard vs Expanded Solution Taxonomy

Standard

<u>Hierarchy</u>		<u>Example</u>
1. Type	} Standardized TBM Taxonomy	➤ Platform
2. Category		➤ Data
3. Name		➤ Database
<hr/>		
4. Offering	} Organization-specific offerings	➤ Oracle DBMS ➤ Microsoft SQL ➤ MongoDB, Hadoop ➤ Amazon DynamoDB

Industry/Organization Specific

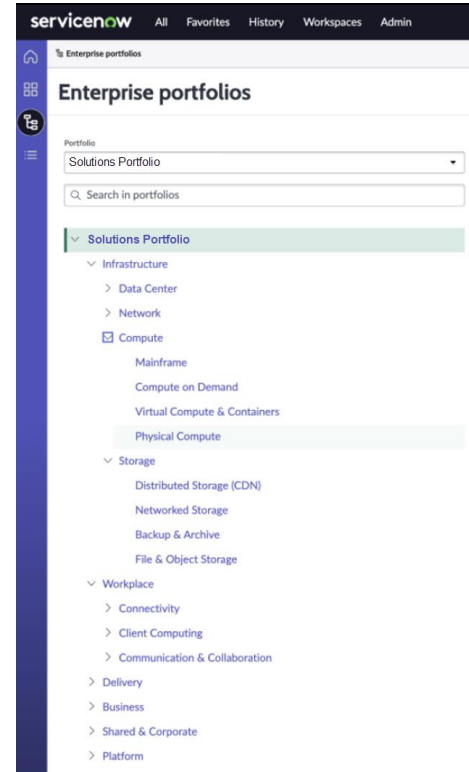
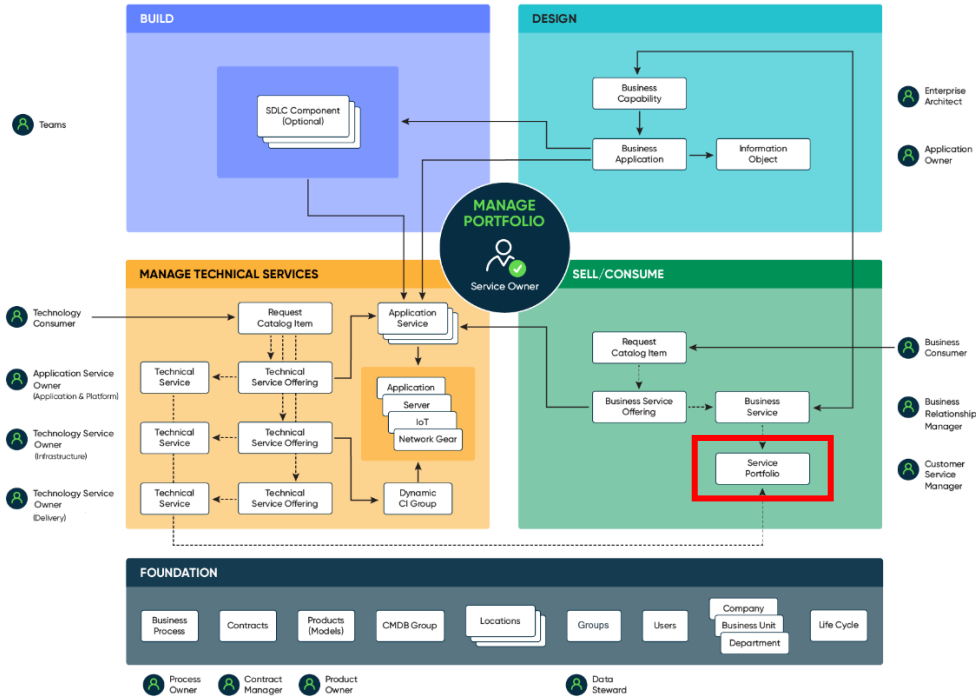
<u>Hierarchy</u>		<u>Example</u>
1. Type	} Standardized TBM Taxonomy	➤ Business
2. Category		➤ Litigation & Dispute Resolution
3. Name		➤ Mediation
<hr/>		
4. Offering	} Organization-specific offerings	➤ Judicial Arbitration ➤ Contractual Arbitration

Other Considerations

ServiceNow's Service Portfolio



The Service Portfolio



Create the Service Portfolio & Structure

1. **Service Portfolio**
New record View: Service Portfolio
* Name: Solutions Portfolio
Short description
Description
Market scope

2. **Taxonomy Layer Definition**
New record View: Service Portfolio
Layer ordering will be locked when a node is created for any layer in this portfolio
* Name: Solution Type
* Service portfolio: Solutions Portfolio * Order: 100
Short description

3. **Taxonomy Layer Definition**
New record View: Service Portfolio
Layer ordering will be locked when a node is created for any layer in this portfolio
* Name: Solution Category
* Service portfolio: Solutions Portfolio * Order: 200
Short description

1. Create the portfolio.
2. Create the “Solution Type” layer.
3. Create the “Solution Category” layer.

Populate the Service Portfolio

1

Taxonomy Node
New record View: Service Portfolio

* Name Shared Services

Short description Solutions to enable internally focused corporate services which automate and support the organization's internal operations.

Description Shared & Corporate solutions are delivered to enable internally focused corporate services which automate and support the organization's internal operations. These are often referred to as business support or shared services which enable the core operating capabilities of an enterprise or organization (e.g. Finance, Human Resources, Legal, etc.).

* Service portfolio Solutions Portfolio

Owned by

* Taxonomy layer Solution Type

Valid from

Parent

Valid to

Submit

1. Add nodes for each Solution Type.

2

Taxonomy Node
New record View: Service Portfolio

* Name Finance Services

Short description Enable the financial management of the enterprise.

Description

* Service portfolio Solutions Portfolio

Owned by

* Taxonomy layer Solution Category

Valid from

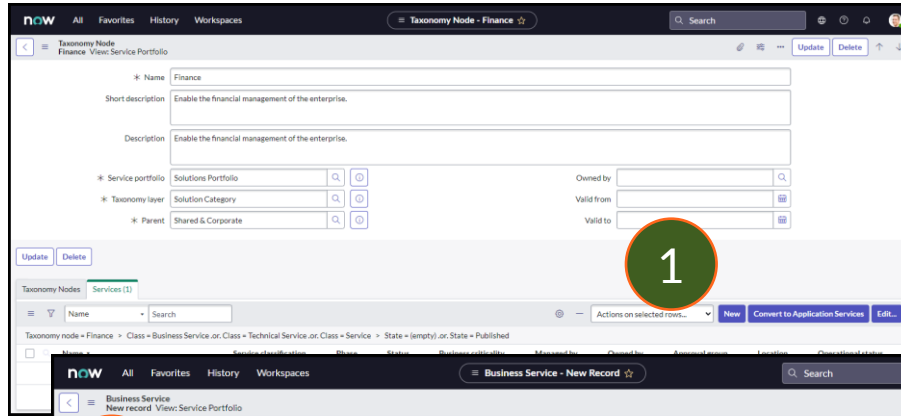
Parent Shared Services

Valid to

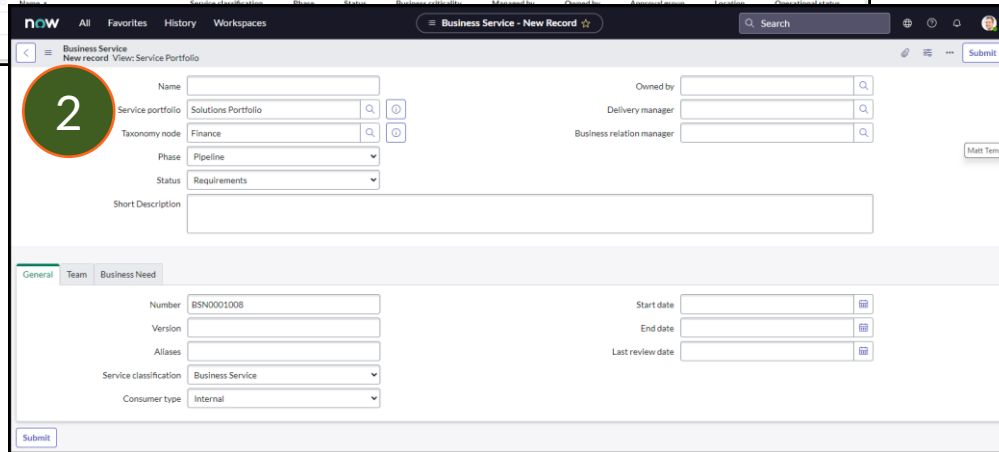
Submit

2. Add nodes for each Solution Category.

Connect Solution Category Nodes to Service Records



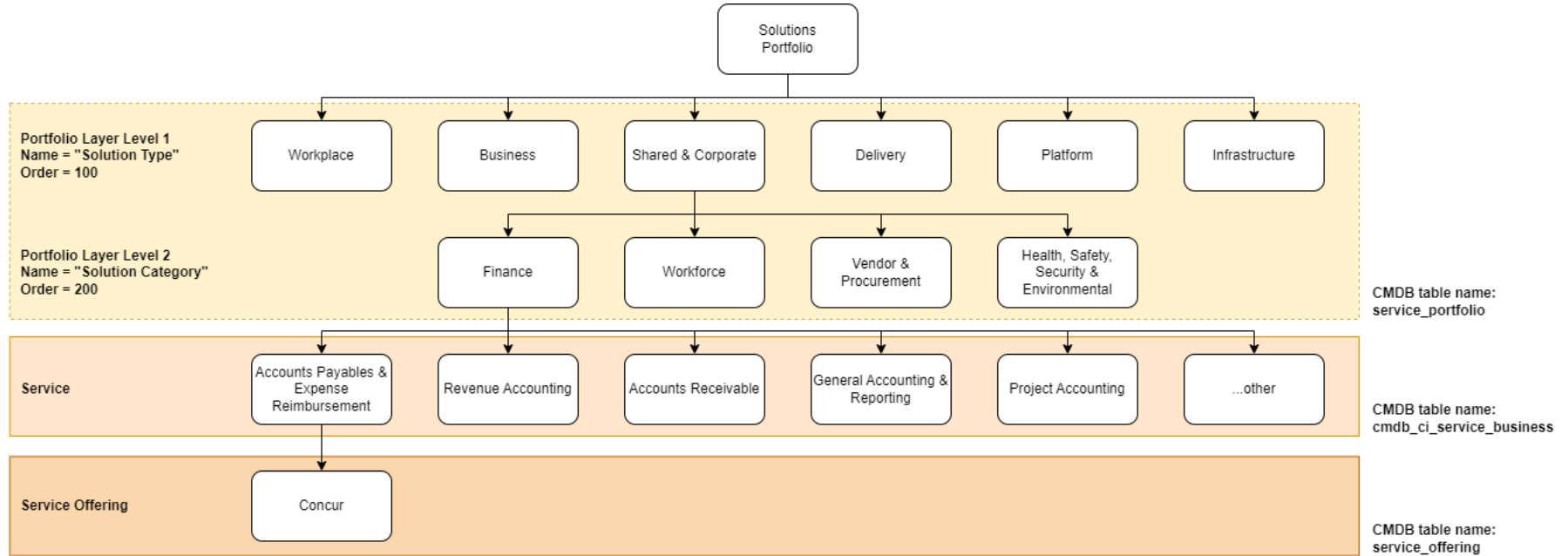
The screenshot shows the 'Taxonomy Node - Finance' form. The 'Name' field is 'Finance'. The 'Short description' and 'Description' fields both contain 'Enable the financial management of the enterprise.' The 'Service portfolio' is 'Solutions Portfolio'. The 'Taxonomy layer' is 'Solution Category'. The 'Parent' is 'Shared & Corporate'. The 'Owned by' field is empty. The 'Valid from' and 'Valid to' fields are empty. The 'Update' and 'Delete' buttons are visible. Below the form, the 'Services (1)' tab is selected, and the 'New' button is highlighted with a green circle and the number '1'.



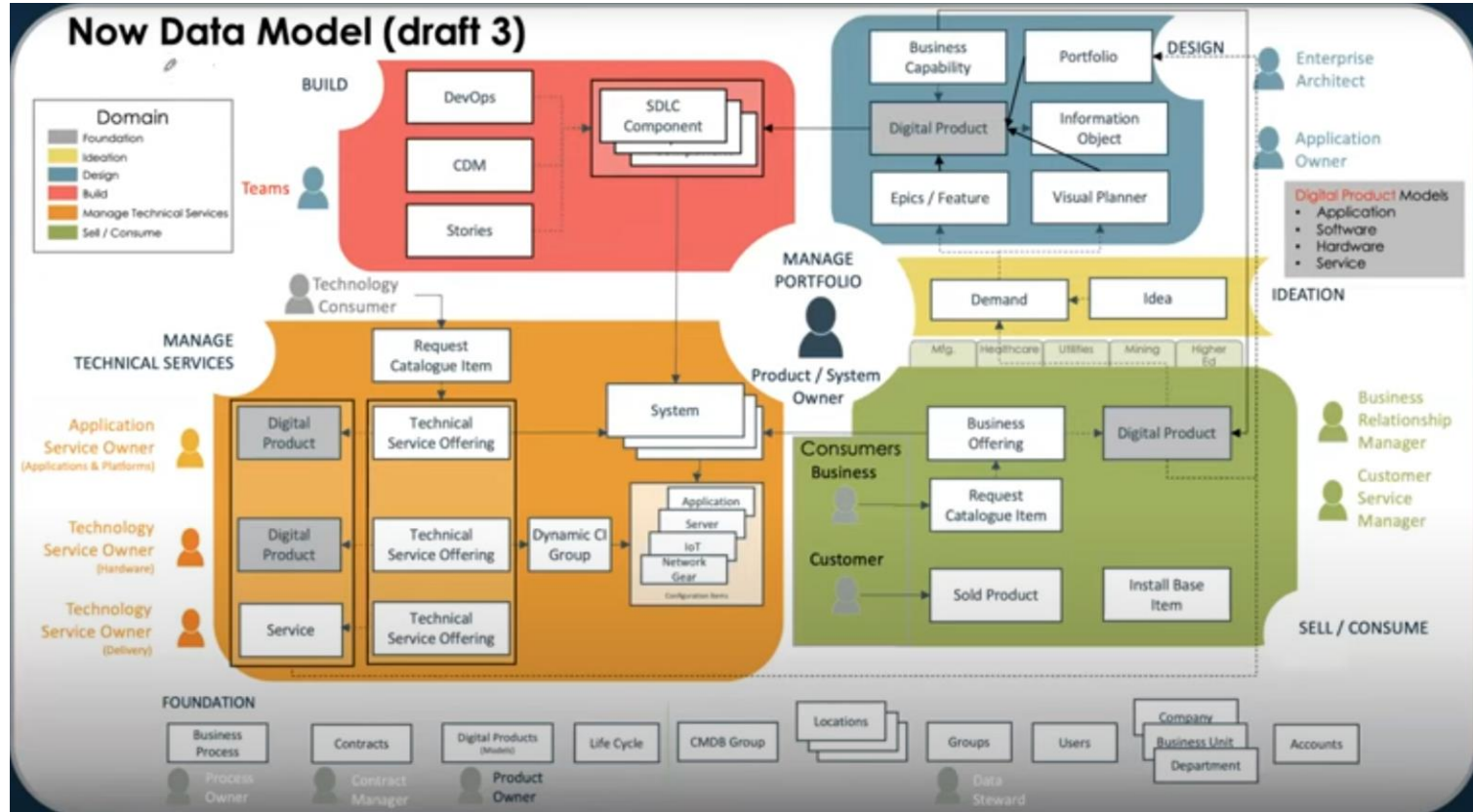
The screenshot shows the 'Business Service - New Record' form. The 'Name' field is empty. The 'Service portfolio' is 'Solutions Portfolio'. The 'Taxonomy node' is 'Finance'. The 'Phase' is 'Pipeline'. The 'Status' is 'Requirements'. The 'Short Description' field is empty. The 'Owned by' field is empty. The 'Delivery manager' field is empty. The 'Business relation manager' field is empty. The 'Number' field is 'BSN0001008'. The 'Version' field is empty. The 'Aliases' field is empty. The 'Service classification' is 'Business Service'. The 'Consumer type' is 'Internal'. The 'Start date' field is empty. The 'End date' field is empty. The 'Last review date' field is empty. The 'Submit' button is visible. Below the form, the 'General' tab is selected, and the 'New' button is highlighted with a green circle and the number '2'.

1. Edit the Solution Category node and click “New” from the Service tab.
2. Create the Service record using the Solution Name of your TBM Solutions Taxonomy.

Solutions Portfolio with Roll-up of “Concur” Offering



CSDM 5 Preview



Q & A

TBM-CSDM Integration Guide available at:

<https://community.tbmcouncil.org/viewdocument/tbm-integration-with-servicenow-csd>

Appendix



What is a Solution?

- A **Solution** is a generic reference to a **Service** or a **Product**.
- **Service** is the means of delivering value to customers by facilitating outcomes customers want to achieve without ownership of specific costs and risks nor awareness of underlying resources and processes needed. Services can comprise of none, one, or many Applications and/or other Services.
- **Product** is alternative label used for a Service. Typically, Product is used exclusively by Agile teams and IT organizations organized as a DevOps practice. A Product is not equivalent to an Application nor Application Family. See Service for further information.

What is an Application?

Identifiable software or tightly coupled software components providing functions required by a Solution (eg Service, Product).

An Application may be part of one or more Solutions.

An Application is ran or hosted on one or more Servers or Clients.

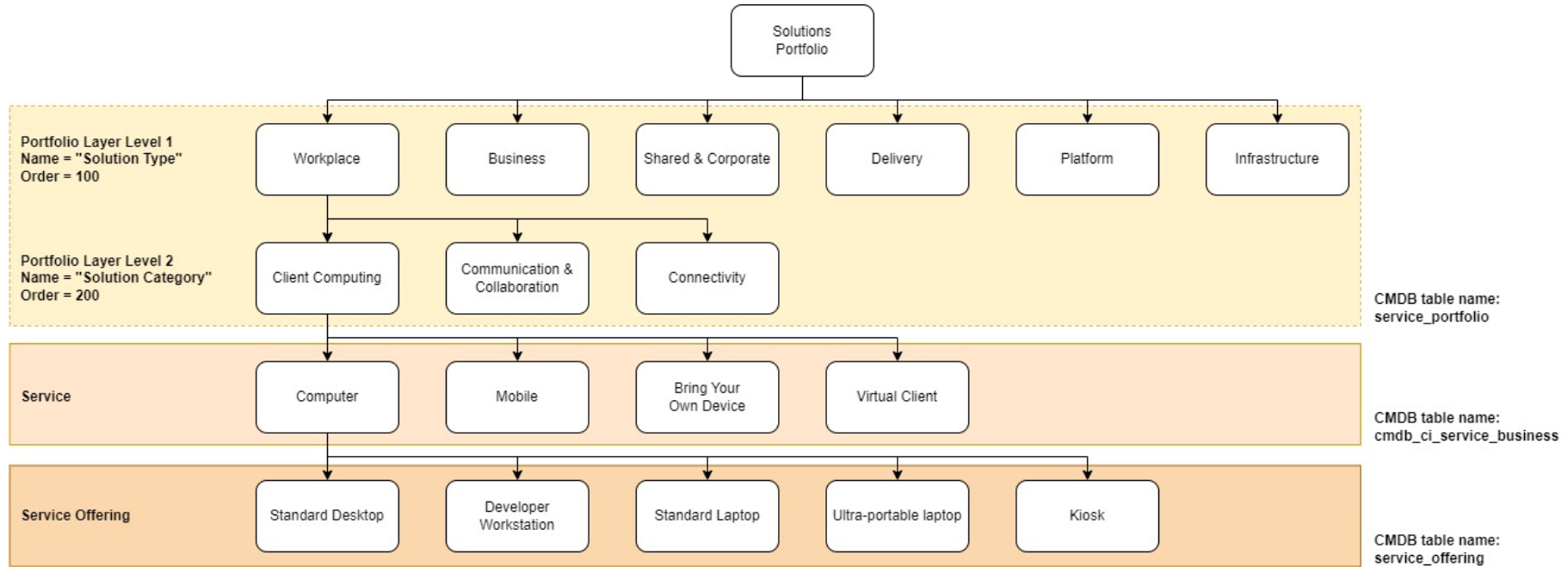
NOTE: This definition includes PaaS and SaaS. An Application is not equivalent to a Solution, but can be a component of a Solution of the same name.

Additional TBM Data and CMDB Sources

alm_asset	Fixed Assets	Recommend obtaining from Financial system and augment with ServiceNow data.
cmn_location	Locations	
cmn_costcenter	Cost Centers	Recommend obtaining from Financial system and augment with ServiceNow data.
cmn_department	Departments	
cmdb_ci_netgear	Network	Recommend obtaining from Financial system and augment with ServiceNow data.
cmdb_ci_storage_device cmdb_ci_storage_volume cmdb_ci_msd cmdb_ci_storage_server	Storage	
cmdb_ci_mainframe cmdb_ci_mainframe_lpar	Mainframe	Usually not needed.
svc_ci_assoc	Additional Relationships	
cmdb_ci_app cmdb_ci_app_server	Middleware	

Solutions Portfolio

Sample “Workplace” Solutions Type Roll-up



Solutions Portfolio

Sample “Business” Solutions Type Roll-up

