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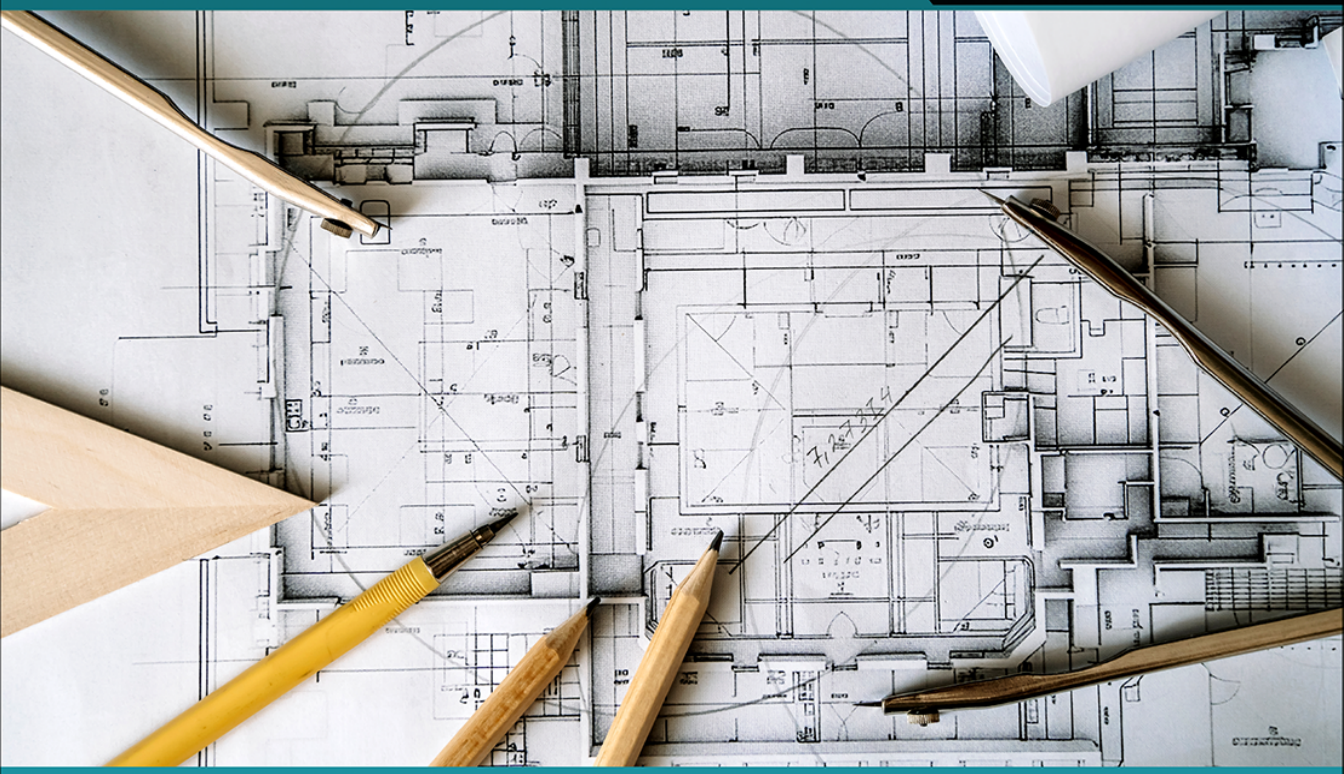

SAP® LeanIX

The Practical Guide

- Use SAP LeanIX for enterprise architecture management
- Model your enterprise architecture, create fact sheets, automate tasks, implement SAP EA framework and more
- Follow real-world use cases and step-by-step instructions for a complete understanding of SAP LeanIX

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Rheinwerk Publishing

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Chapter 2
Introduction to SAP LeanIX

You have decided to level up your enterprise architecture with SAP LeanIX. Congratulations! Now, it's time to mold your workspace to your needs during the setup phases. This chapter will introduce the current meta model design and useful features and capabilities that will make this endeavor as smooth and collaborative as possible for you and your organization.

To begin, you'll learn about the origin of SAP LeanIX, understanding certain design decisions that were made in the past and that still influence the current solution, for instance, in the meta model and the development of features and capabilities.

We'll then explore which capabilities belong to which SAP LeanIX products and how the out-of-the-box meta model works with the various fact sheet types. We'll dive into selected fact sheet types to understand the modeling recommendations from the SAP LeanIX experts.

Finally, you'll get a taste of some useful collaboration features in SAP LeanIX and how they contribute to shared data quality and governance responsibility across the organization that will benefit everyone, from IT to business and service.

2.1 Fundamentals and Product Structure

Today, SAP LeanIX is one of the core solutions of SAP's business transformation management offerings. How did it develop into this strategic and important product for C-suite executives? Let's go back in history to understand where SAP LeanIX came from.

LeanIX was founded in 2012 by André Christ and Jörg Beyer in Bonn, Germany. Both had worked for years in a global logistics company and had built bridges between consulting, IT, and business users. A recurring pain point in their work was delayed strategic decision-making due to lack of information and documentation in the IT management discipline. Multiple consultants would spend months researching and interviewing IT and business colleagues to create an accurate and complete inventory of applications and IT infrastructure in use, only to find that by the time this information was to be used for decision making, it was already outdated. In addition, enterprise architecture back in that time was an ivory tower discipline with little connection to the business side of the company. Frameworks and tools were made for specialists and industry experts, and it was challenging to find a united language for cross-departmental exchange and decision making.

Christ and Beyer wanted to develop an easy-to-understand meta model that would facilitate IT and business communication, supported by intuitive and easy-to-use software that would encourage collaboration and exchange between the various disciplines in an organization. The goal was to develop an industry-agnostic solution that could be used anywhere in the world.

After several iterations, LeanIX, an abbreviation of *Lean Information Exchange*, was developed into three separate but integrated products:

- LeanIX Enterprise Architecture Management (EAM)
- Value Stream Management (VSM)
- LeanIX SaaS Management Platform (SMP)

In 2022, LeanIX's partnership with SAP intensified and LeanIX became a certified SAP-endorsed app, ultimately leading to the company's acquisition by SAP in November 2023, giving us SAP LeanIX. During the acquisition, SAP decided that SAP LeanIX would remain a software-as-a-service (SaaS) product and that the two other LeanIX software products, VSM and SMP, would be sunsetted. Core capabilities of both products have since been transferred and integrated into the SAP LeanIX enterprise architecture product. The design changed, leaving SAP LeanIX as a base product that also offered add-on products with additional capabilities:

- Base product: SAP LeanIX Application Portfolio Management
- Add-on product: SAP LeanIX Technology Risk and Compliance
- Add-on product: SAP LeanIX Architecture and Road Map Planning

We'll discuss each of these products in more detail in the following sections.

Note

In August 2026, André Christ, the remaining founder, decided to move on from SAP LeanIX and focus on new adventures. Dominik Rose, a longtime SAP LeanIX executive, took over the position of general manager for SAP LeanIX products.

Further Resources

You can find the most recent information about SAP LeanIX via the following resources:

- SAP LeanIX website: *https://www.leanix.net/en/enterprise-architecture*
- SAP LeanIX user documentation:
  - *http://s-prs.co/v620601*
  - *http://s-prs.co/v620602*
  - *http://s-prs.co/v620603*

2.1.1 SAP LeanIX Application Portfolio Management

The base product, *SAP LeanIX Application Portfolio Management*, is the foundation and starting point of the enterprise architecture work. This product includes the SAP LeanIX workspace provisioning and all its dimensions, for example:

- The artifact inventory configured with the out-of-the-box meta model
- The dashboard area with preconfigured example dashboards for onboarding and standard use cases
- The reporting area with template reports
- The diagramming area with access to SAP reference architecture diagrams
- Collaboration features such as to-dos, surveys, presentations, architecture decisions, and more

Figure 2.1 shows an overview of the **Inventory** tab in SAP LeanIX Application Portfolio Management. In the top ribbon, you can see tabs for other capability areas, such as **Dashboards**, **Reports**, **Diagrams**, and **More**; the latter is a dropdown menu, which you can expand to see additional capabilities. This is where you will find features such as **To-Dos**, **Surveys**, **Presentations**, **Reference Catalog**, and the **Extension Hub** (formerly known as the SAP LeanIX store).

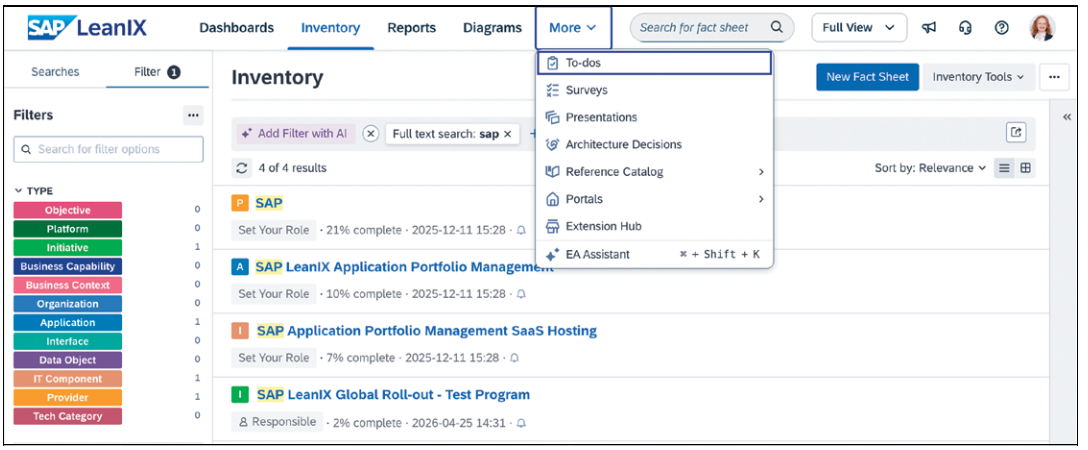


Figure 2.1: SAP LeanIX Application Portfolio Management: Top Ribbon Options

In addition, the following *discovery capabilities* are included:

- SaaS discovery
- SAP landscape discovery: public and private cloud, and on-premise
- SAP extension discovery: SAP Build, SAP BTP, Cloud Foundry environment, and SAP BTP, Kyma runtime
- AI agent and Model Context Protocol (MCP) server discovery

Figure 2.2 shows an overview of the available integrations for various discovery capabilities in SAP LeanIX Application Portfolio Management. To navigate to this overview, click the round **User** button in the upper-right corner, then click **Administration**. In the left-hand side menu, scroll to the **DISCOVERY AND INTEGRATIONS** area and click **Integrations**. In the upper-right corner, click the blue **Add Integration** button. A new overview will open that looks like Figure 2.2. On the left-hand side, you can filter the integrations based on classifications such as **EA Toolchain** or **Discovery**. Every integration has either a **More Information** or **Configure** button and a link to the SAP LeanIX user documentation.

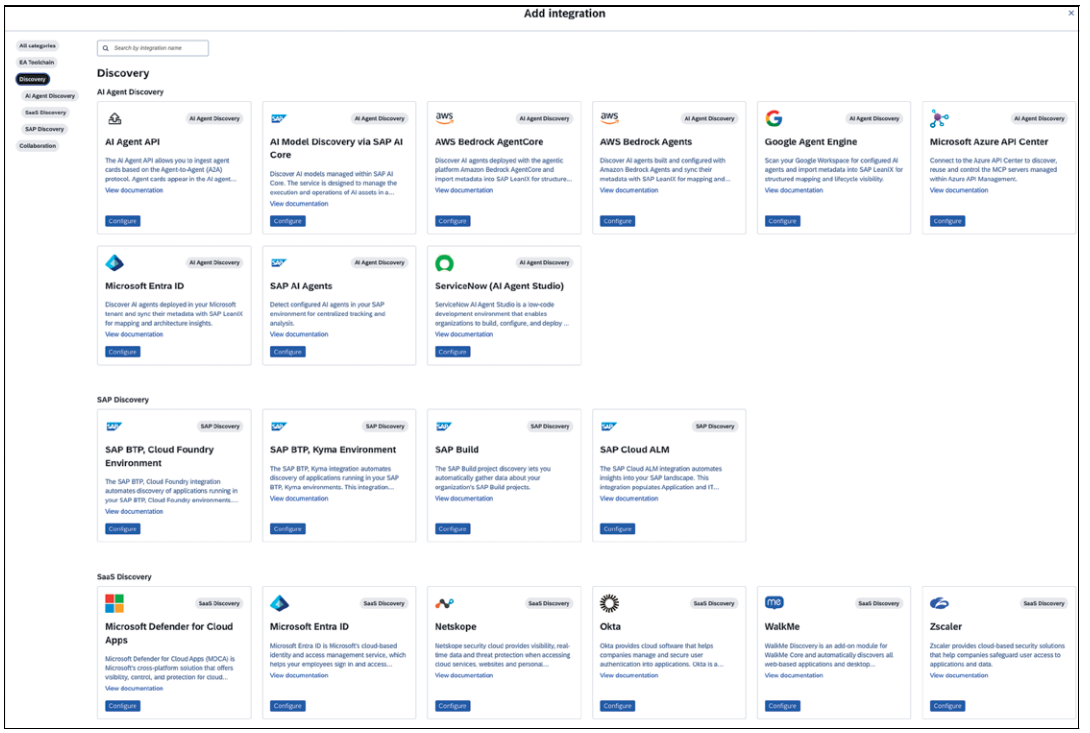


Figure 2.2: SAP LeanIX Application Portfolio Management: Discovery Capability Overview

Furthermore, the following *reference and integration capabilities* are available:

- SAP Reference Business Architecture business capability reference catalog
- Application and IT component catalog
- Tech category reference catalog based on the Technology Business Management (TBM) taxonomy
- SAP Signavio integration to retrieve business processes
- SAP SuccessFactors integration to receive the organization structure
- Apptio integration to enrich portfolio with cost data
- Collibra integration to sync data objects and SAP data products
- Custom integration capability (self-developed or via SAP Integration Suite)

In SAP LeanIX Application Portfolio Management, admins can configure four different reference catalogs in the **Administration** area. You can navigate there by clicking the round **User** button in the upper-right corner and then clicking **Administration**. As shown in Figure 2.3, in the left-hand side menu, scroll to the **DISCOVERY AND INTEGRATIONS** area and click **Reference Catalog**. There, under the related tabs, admins can configure the **Business Capability**, the **Application**, the **IT Component**, and the **Tech Category** catalogs.

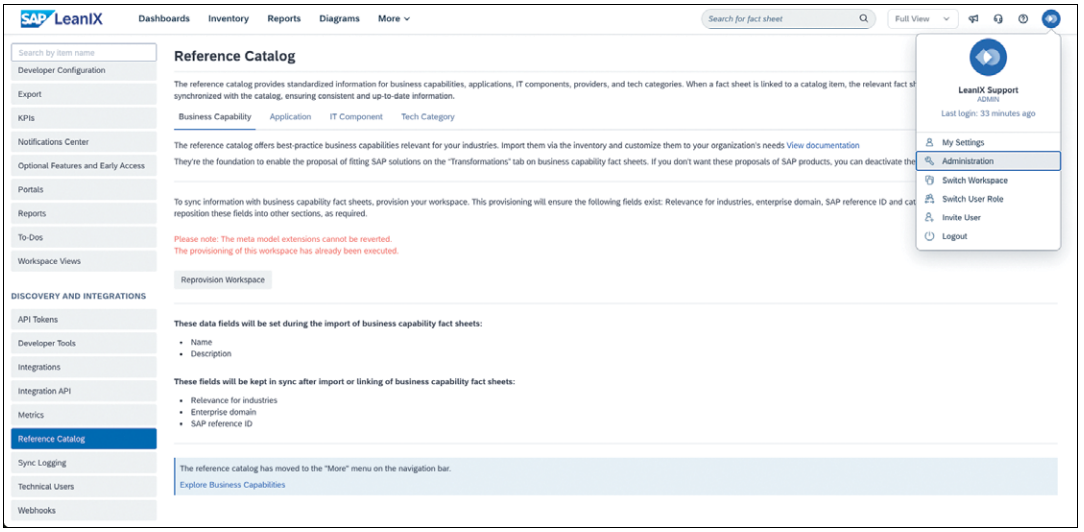


Figure 2.3: SAP LeanIX Application Portfolio Management: Reference Catalog Overview in Administration Area

Other relevant integrations can be seen in the **EA Toolchain** area, as shown in Figure 2.4.

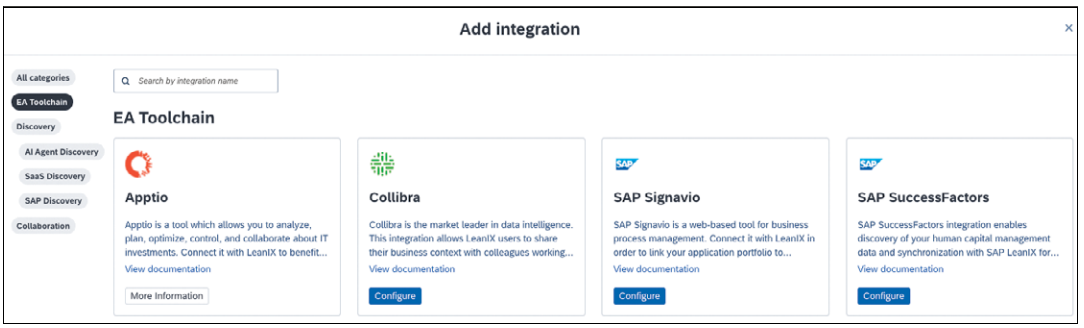


Figure 2.4: SAP LeanIX Application Portfolio Management Additional Integration Capabilities Overview

Collibra and **SAP Signavio** can be self-configured with the help of the user documentation. However, you need to request the **Apptio** integration via an SAP support ticket as customer support colleagues need to activate the integration in the backend and help with the setup.

You can always create an SAP support ticket if you have issues setting up an integration or want to discuss advanced configurations.

2.1.2 SAP LeanIX Technology Risk and Compliance

The *SAP LeanIX Technology Risk and Compliance* add-on product offers the following additional capabilities:

- ServiceNow and Jira Service Management integration for technology stack management/discovery
- GitHub enterprise integration for microservice discovery
- Microservice discovery via manifest file and script from any source
- Software bill of materials (SBOM) viewer
- Tech stack discovery from SBOMs
- Vendor lifecycle catalog for IT components to manage end-of-life risks
- Obsolescence risk and tech standards meta model extension
- Obsolescence risk management preconfigured dashboard

Figure 2.5 shows how to access the **Software Bill of Materials** viewer, available via the top ribbon menu's **More** dropdown menu if the SAP LeanIX Technology Risk and Compliance product has been purchased.

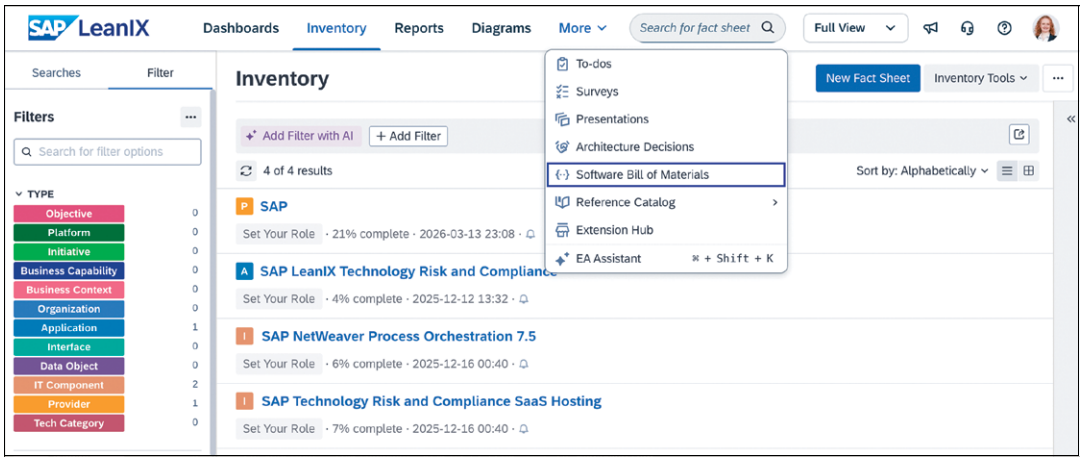


Figure 2.5: SAP LeanIX Technology Risk and Compliance: More Options

SAP LeanIX Technology Risk and Compliance also includes new capabilities via the **Inventory Tools** dropdown, as shown in Figure 2.6. The **Tech Stack Discovery** option via SBOM ingestion is an additional feature that reads out certain elements of an SBOM of a specific format and automatically creates an aggregated IT component to bring transparency into frameworks and libraries used in self-built software.

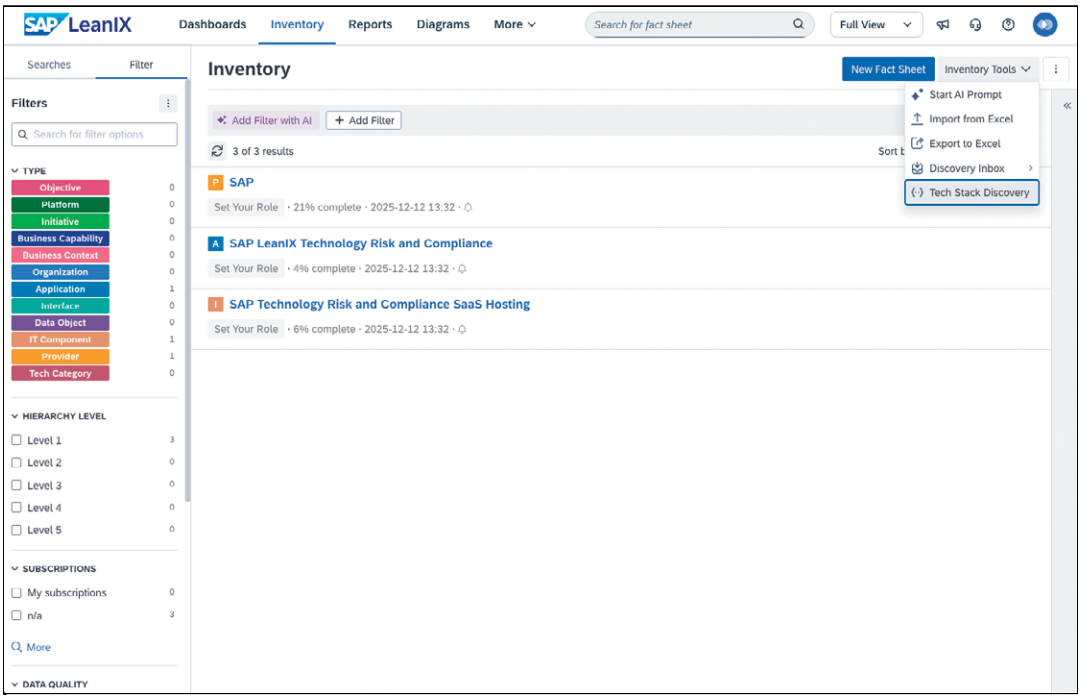


Figure 2.6: SAP LeanIX Technology Risk and Compliance: Tech Stack Discovery Capability Under Inventory Tools

Figure 2.7 displays the additional ServiceNow integration option, which becomes available when purchasing the SAP LeanIX Technology Risk and Compliance product. ServiceNow is widely used software for IT service and asset management. In ServiceNow, companies manage their IT assets from the logical down to the physical instance level. In SAP LeanIX, only the logical level, the product model level, is of interest to enterprise architects. This out-of-the-box integration is very versatile. It lets you sync artifacts from ServiceNow's configuration management database (CMDB) to SAP LeanIX and vice versa. Commonly exchanged artifacts encompass IT components, applications, business capabilities, and tech categories.

To activate the self-built software discovery option, workspace admins first must navigate to the **Administration** area. In the left-hand menu, select **Self-Built Software Discovery** under the **DISCOVERY AND INTEGRATIONS** section, as shown in Figure 2.8. First, the meta model extension must be provisioned, which will be triggered by clicking the blue **Provision** button. After that, the GitHub Enterprise integration can be configured, or a custom continuous integration/continuous delivery (CI/CD) pipeline can be connected via API and script. For more on this capability, see Chapter 9, Section 9.1.

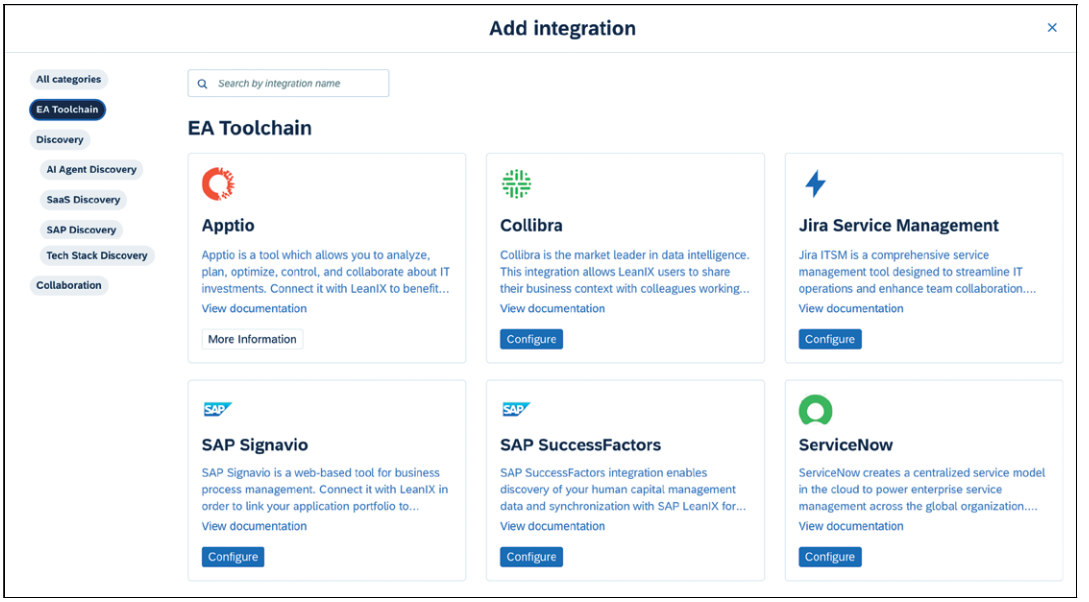


Figure 2.7: SAP LeanIX Technology Risk and Compliance: ServiceNow and Jira Integration Options in Administration Area

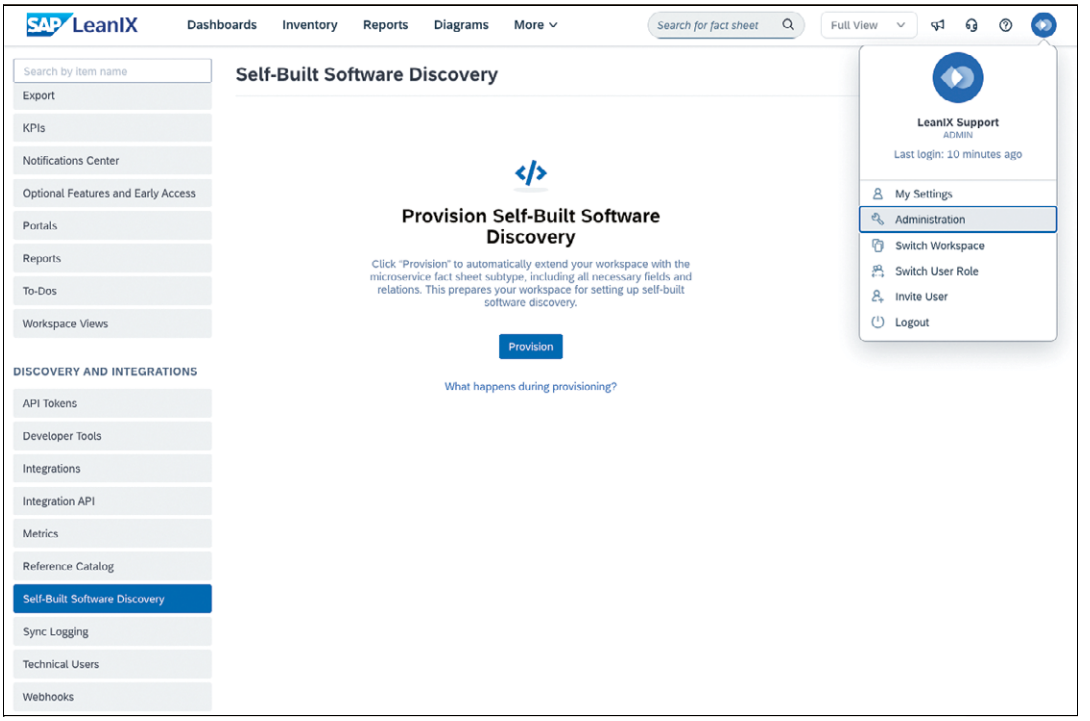


Figure 2.8: SAP LeanIX Technology Risk and Compliance: Self-Built Software Capability with GitHub Enterprise Integration and Microservice Meta Model Extension

Further Resources

For more information, see the following resources in the SAP LeanIX user documentation:

- Self-built software discovery: *http://s-prs.co/v620604*
- GitHub Enterprise integration: *http://s-prs.co/v620605*
- Manual ingestion via script and API call: *http://s-prs.co/v620606*

There is one additional feature in the IT component reference catalog that becomes available when activating the SAP LeanIX Technology Risk and Compliance product: vendor lifecycle. To access this, first ensure that the **Vendor Lifecycle** checkbox is selected under the **IT Component** tab of the **Reference Catalog** area under the **DISCOVERY AND INTEGRATIONS** section, as shown in Figure 2.9.

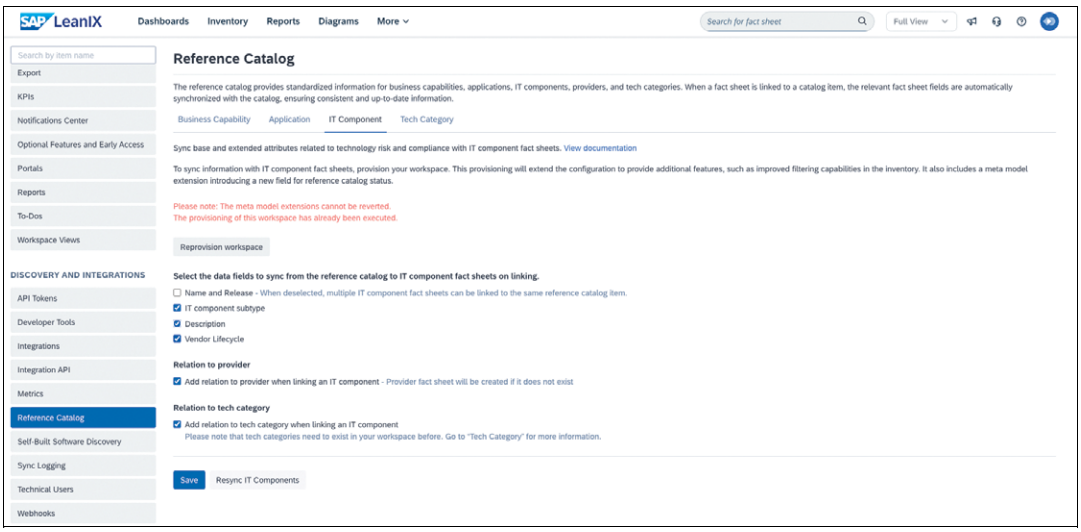


Figure 2.9: SAP LeanIX Technology Risk and Compliance: IT Component Catalog Settings

Figure 2.10 shows what the vendor lifecycle looks like in the IT component reference catalog. The regular IT component lifecycle, which is entered by the fact sheet owner, captures the time period during which the organization plans to use the IT component. The vendor lifecycle, however, shows additional information provided by the SAP LeanIX catalog research team. It indicates whether an IT component will still receive updates from the vendor, and is therefore **Active**, or has reached its **End of (Standard) Support**.

Admins in the **Administration** area can select which of the predefined dashboards will be visible for SAP LeanIX workspace users. Figure 2.11 shows the **Predefined Dashboards** options for the SAP LeanIX Application Portfolio Management base product plus the **Obsolescence risk management** option, which is available when SAP LeanIX Technology Risk and Compliance is added.

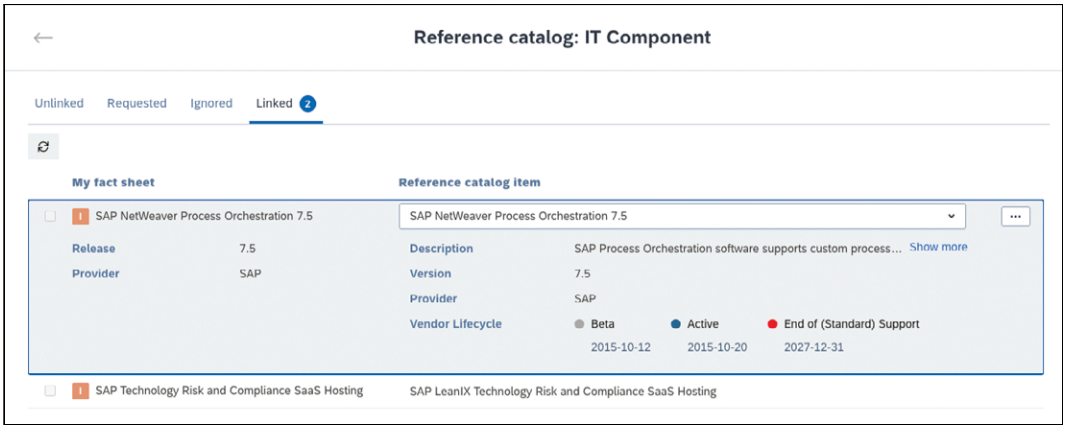


Figure 2.10: SAP LeanIX Technology Risk and Compliance: IT Component Catalog Vendor Lifecycle Example

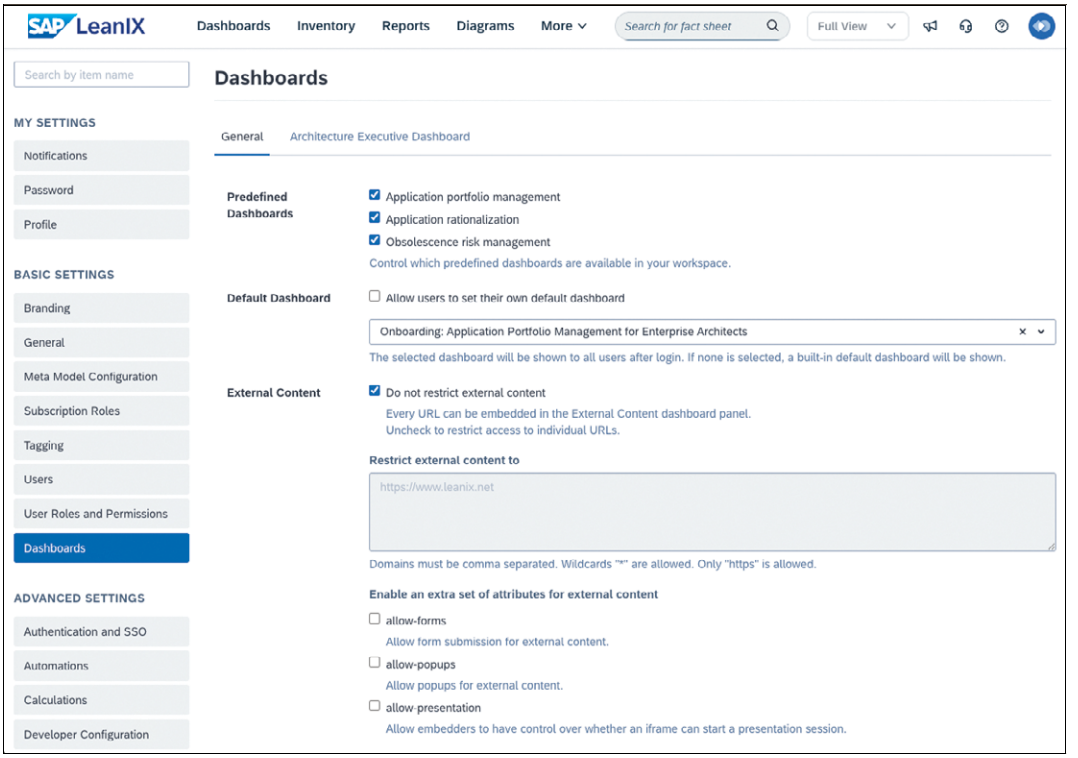


Figure 2.11: SAP LeanIX Technology Risk and Compliance: Dashboard Options in Administration Area

Users can see all dashboards that are available to them in the dashboard overview, accessed by navigating to the **Dashboards** tab in the top ribbon. Expand the left-hand side

menu by clicking the left-pointing arrow in a circle on the separator line, then select **All Dashboards**. As shown in Figure 2.12, the **Obsolescence risk management** dashboard is available (first row of dashboards, fourth entry from the left).

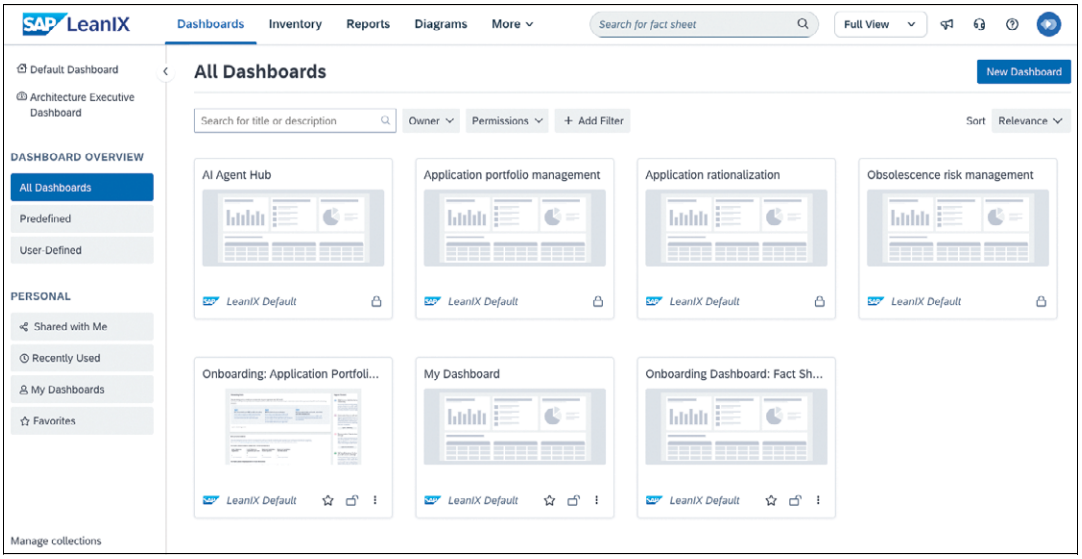


Figure 2.12: SAP LeanIX Technology Risk and Compliance: Obsolescence Risk Management Dashboard Shown in Dashboard Overview

2.1.3 SAP LeanIX Architecture and Road Map Planning

The final add-on product, *SAP LeanIX Architecture and Road Map Planning*, offers the following additional capabilities:

- SAP Cloud ALM for projects and Jira project management integration
- Preconfigured transformation templates
- Committed initiatives for time-slider transformation projections in reports
- Milestone extension of initiative fact sheets
- Impacts meta model extension
- Transformation explorer
- Target architecture diagrams

In Figure 2.13, the additional integrations that are available when activating the SAP LeanIX Architecture and Road Map Planning product are shown: **Jira for Architecture and Road Map Planning** and **SAP Cloud ALM for managing projects**. These can be found in the **Administration** area under the **DISCOVERY AND INTEGRATIONS** section in the **Integrations** menu item, after clicking the **Add Integration** button and filtering on the left-hand side for **Collaboration**.

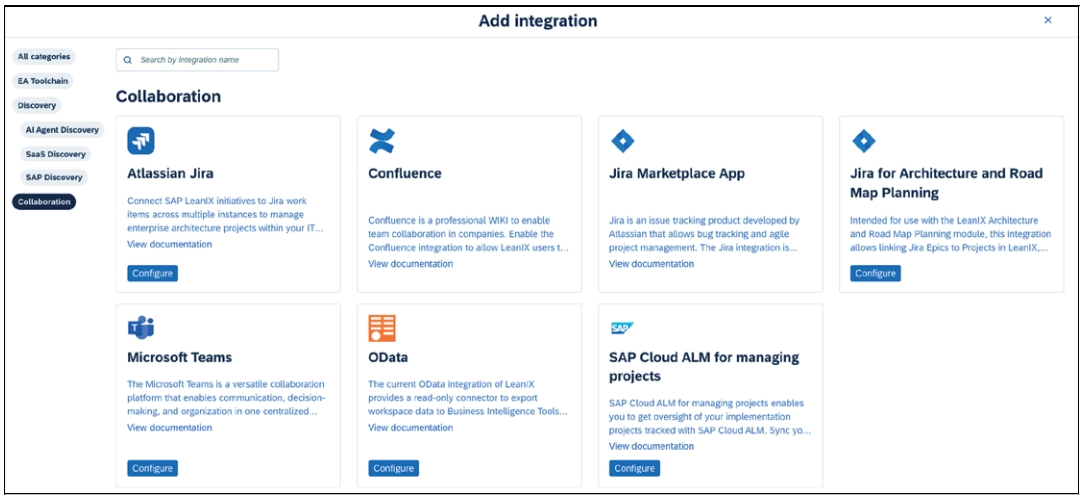


Figure 2.13: SAP LeanIX Architecture and Road Map Planning: SAP Cloud ALM and Jira Integration Capabilities

When the SAP LeanIX Architecture and Road Map Planning product is activated, the meta model extensions and features for transformations and milestones in the initiative fact sheets are not automatically provisioned. This might change in the future, but as of the time of writing (summer 2026), admins must navigate to the **Administration** area, navigate to the **ADVANCED SETTINGS** area in the left-hand side menu, and select **Optional Features and Early Access**, as shown in Figure 2.14. In the middle area, scroll to the **Use Case Extensions** area and click the **Activate** button next to **Architecture Road Map Planning: Transformations & Milestones**.

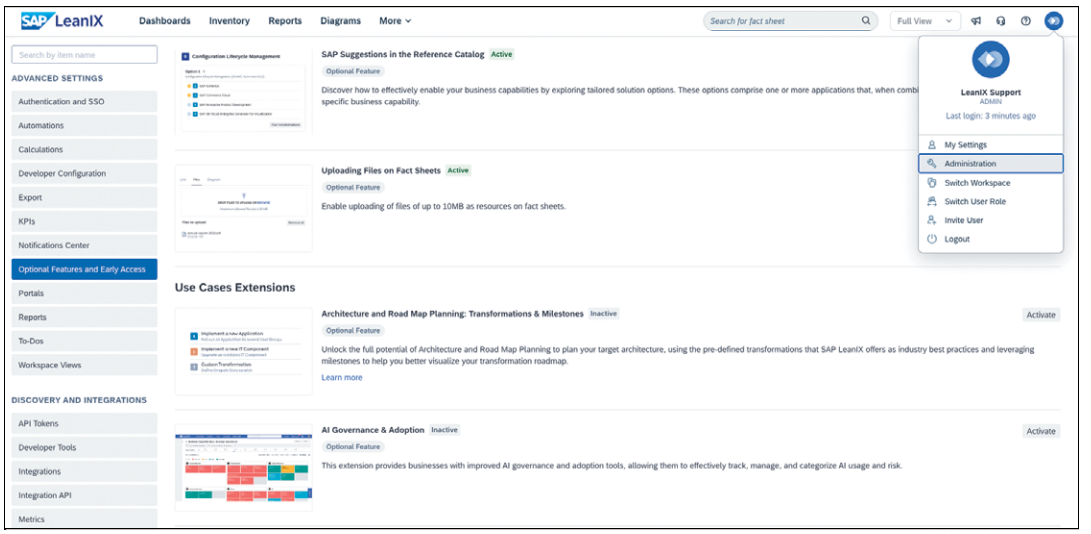


Figure 2.14: SAP LeanIX Architecture and Road Map Planning: Transformation and Milestone Meta Model Extension

Once transformations are activated in the workspace, admins will find a new menu item called **Transformations** in the **Administration** area under the **ADVANCED SETTINGS** section. As shown in Figure 2.15, admins can configure certain **Settings**, browse **Predefined Transformation Types**, create their own transformation templates in the **Configured Transformation Types** tab, or mass-update transformations in the **Excel Import & Export** tab.

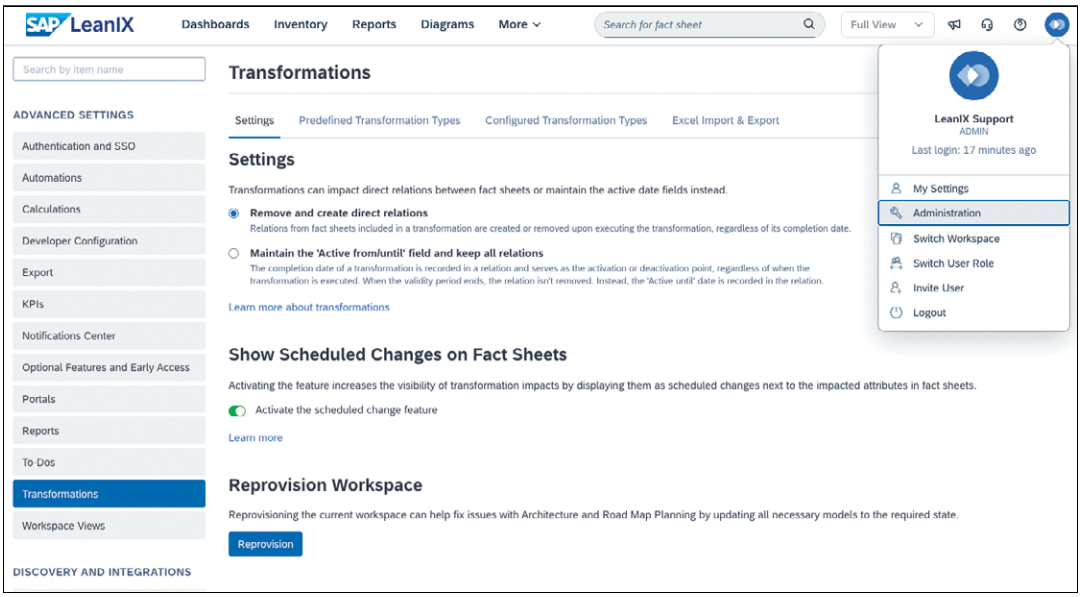


Figure 2.15: SAP LeanIX Architecture and Road Map Planning: Predefined Transformation Settings in Administration Area

Figure 2.16 displays the additional features that are available in the SAP LeanIX Architecture and Road Map Planning product in the top ribbon's **More** dropdown menu.

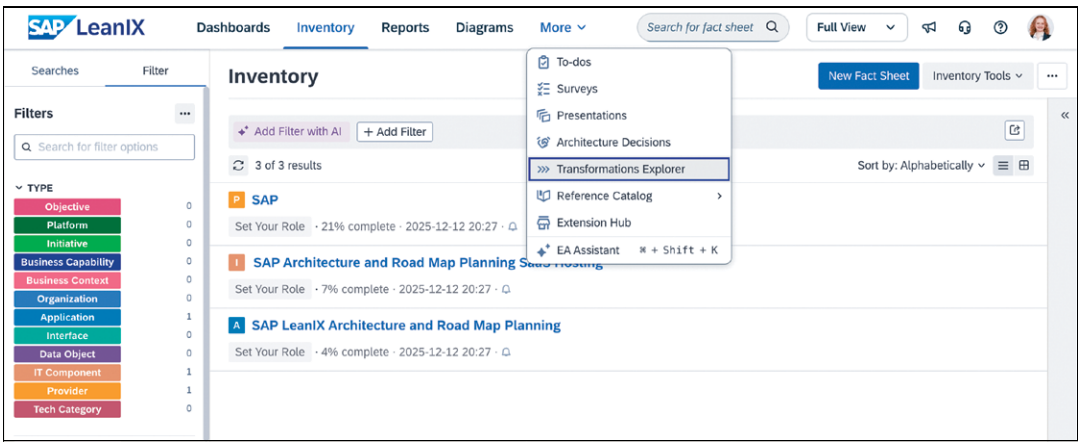


Figure 2.16: SAP LeanIX Architecture and Road Map Planning: Architecture Decisions and Transformations Explorer Capabilities Menu Options

2.2 Meta Model and Fact Sheets

It was the founders' wish to create simple, easy-to-understand, and easy-to-use software with an intuitive user interface. In contrast to other enterprise architecture concepts and frameworks, SAP LeanIX focuses on a simple meta model centered around the logical application. The logical artifacts are abstractions of the technical implementation to reduce the noise of details and surface the most important aspects for strategic decision-making. In addition, the software is designed for plug and play, meaning that a preconfigured meta model with example report visualizations and dashboards is available immediately after provisioning of the SAP LeanIX workspace to ensure fast time to value. Smaller companies especially, or those just starting with their enterprise architecture discipline, can start right away by loading their data into the out-of-the-box meta model and using collaboration features to enrich the data via crowdsourcing. After the first data load and documentation phase, the quality-tracking features of SAP LeanIX help to establish basic data governance responsibilities to ensure continuous data reviews. Once the data foundation is captured, enterprise architects and senior stakeholders can analyze and oversee the application and IT landscape to identify areas of improvement and design and plan architectural changes.

In the following sections, we'll look into the meta model in detail and discuss its main artifact, the fact sheet. We'll review selected fact sheet types that are recommended when beginning the enterprise architecture work in SAP LeanIX with an application portfolio assessment use case.

Further Resources

To learn in detail about every out-of-the-box and optional fact sheet type, check the SAP LeanIX user documentation under *http://s-prs.co/v620607*.

2.2.1 Basics of the Meta Model

Within the meta model, the conceptual building blocks of artifacts are called *fact sheet types* (e.g., the *application*) and are clustered by dimensions relevant for the enterprise architecture discipline (e.g., *application and data architecture*). A *fact sheet* is a grouping of relevant information (attributes, relations, meta data, tags, collaboration interaction, etc.) about a specific item (e.g., the SAP LeanIX application).

The SAP LeanIX meta model is structured along the following dimensions, as indicated in Figure 2.17:

- **Strategy and transformation**
  Used to capture strategic enterprise architecture objectives and to plan initiatives related to the modeled application and IT landscape, using aggregated platform bundling of applications or IT components for senior leadership alignment.

- **Business architecture**
  Used to bring context to the application and IT landscape by assigning organizational structures such as departments or regions/countries to artifacts via the organization fact sheet and assigning supported business capabilities to applications, as well as capturing various other business context types, such as processes, value streams, or products, and their relation to applications and IT components.
- **Application and data architecture**
  Includes the core and centerpiece of the SAP LeanIX product, the application, which is connected via logical interfaces and uses data objects or transfers data objects via interfaces to other applications.
- **Technical architecture**
  The IT layer underneath the application is centered around the IT component, which has a provider, also called a *vendor*, and is defined by a tech category.

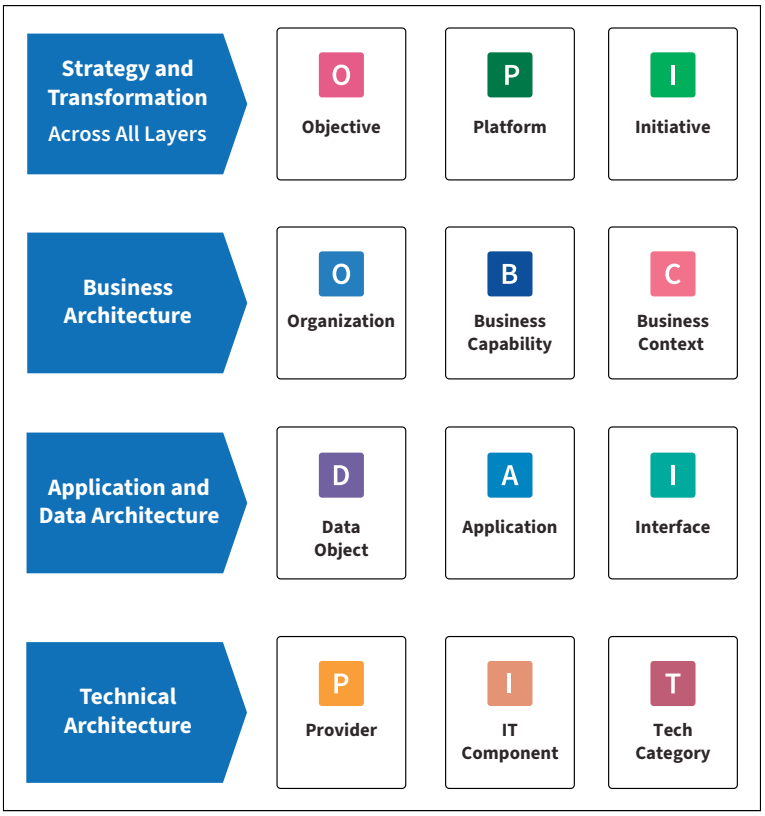


Figure 2.17: SAP LeanIX Current Meta Model: Version 4

Note

The colors of the fact sheet types correspond with the default color-coding of the artifacts of the respective types in diagrams and reports.

Beyond the out-of-the-box fact sheets, SAP LeanIX also provisions out-of-the-box relations between the preconfigured fact sheet types. Figure 2.18 illustrates the relational concept.

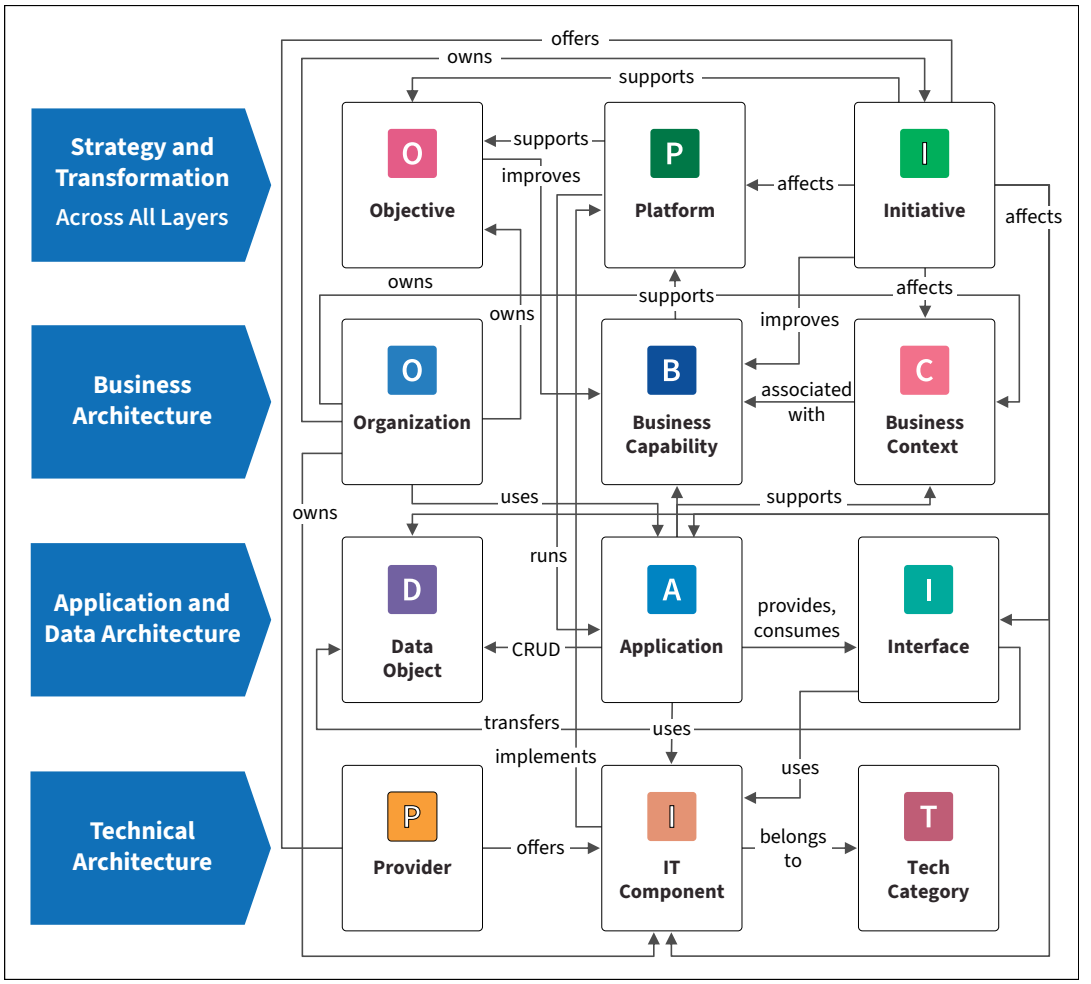


Figure 2.18: SAP LeanIX Out-of-the-Box Relational Concept of the Preconfigured Meta Model

Fact sheets are in general structured in the same way with the same layout (see, for example, Figure 2.19).

As a header, you will see the display name of the respective fact sheet. In the example shown in Figure 2.19, this is SAP LeanIX Application Portfolio Management. Under the name, you can see the fact sheet type with which this artifact was created (in this case, **Application**). Below the fact sheet type, various tabs capture different information about the artifact. The number of tabs vary depending on the SAP LeanIX products available.

The base product tabs include the following:

- **Fact Sheet**
  Captures data such as the attributes and relations, clustered in sections and subsections
- **Subscriptions**
  Captures the responsibility structure of the fact sheet, such as the responsible owner or interested observers
- **Comments**
  Used to publicly exchange notes and comments on the artifact
- **Recommendations**
  Intelligent feature that supports responsible persons and admins increasing data completeness via smart recommendations, for instance, AI-generated descriptions
- **To-Dos**
  Used to capture questions and assign action items between users of this specific fact sheet
- **Resources**
  Area to see linked diagrams, add links to external websites, and upload related files or logos
- **Metrics**
  Area to bring in external data points via API from third-party sources to visualize additional time series and charts on this fact sheet
- **Surveys**
  Overview of active or concluded surveys this fact sheets was a part of
- **Last update**
  Audit log of past changes to the fact sheet data

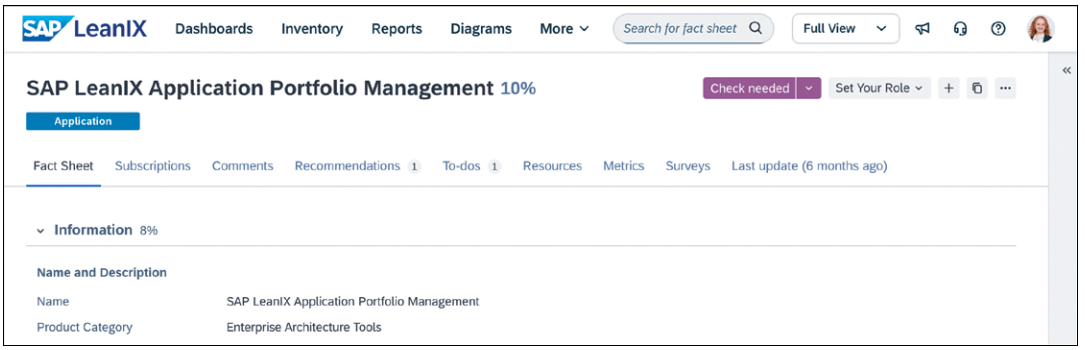


Figure 2.19: General Fact Sheet Structure

2.2.2 Application

The *application* is the core fact sheet type in SAP LeanIX. It represents a software application (sometimes also called a *software service* or *program*) that is used for business tasks by end users (human or agentic) to support a certain business capability. The application portfolio can be maintained, analyzed, and related to other entities such as underlying IT components, using or owning organizations, or supported business capabilities in SAP LeanIX.

The application is a logical artifact, meaning that it's an abstraction of the real technical implementation. Applications can be any of the following:

- Purchased, like commercial, off-the-shelf software (e.g., SAP LeanIX)
- Open-source applications (e.g., Jenkins)
- Custom-built software developed by your organization (e.g., a self-built contract compliance checker)
- Simple tools that don't seem to be applications (e.g., Excel spreadsheets that support specific business processes and business capabilities)

We recommend that you start with a high-level collection of logical applications if no respository already exists. Helpful features to discover applications include the following:

- **SaaS discovery**
  Offers discovery of SaaS applications by integrating with single-sign-on (SSO), secure access service edge (SASE), and cloud access security broker (CASB) solutions. See Chapter 4, Section 4.2.4 for more information.
- **SAP landscape discovery**
  Offers discovery of SAP products, systems, services, and custom-built extensions in use. See Chapter 4, Section 4.2.3 for more information.
- **Application reference catalog**
  Offers an in-tool application catalog curated by the SAP LeanIX research team for SAP applications, SAP AI agents, and business SaaS applications.
- **Excel import via formatted Excel tables**
  Offers manual bulk import of fact sheets, fact sheet data, and relations. See Chapter 4, Section 4.2.6 for more information.

After creating your collection of applications, you can proceed with application fact sheet modeling. It's important to define modeling guidelines to avoid confusion, duplicates, or unneeded noise in the inventory. Be clear about which logical level you need to model the different applications for strategic decision-making. Here are some best practices to keep in mind:

- In the beginning, it's best to stay at a high level, for example, only modeling SAP LeanIX and not add-on products such as SAP LeanIX Application Portfolio Management and SAP LeanIX Technology Risk and Compliance in the application fact sheet modeling design.

- Only model drilldowns into more granular levels such as subproducts, modules, regional instances, and so on if you need to do so from a strategic decision-making perspective or if you want to track data on a more granular level.
- For drilldowns, such as into specific modules or products, we recommend modeling them with a parent-child relation to the logical parent to make use of the hierarchy aggregation functionality in reports.
- When modeling parent-child relations, we recommend maintaining the business capability relation of applications at the lowest level and using reports to create aggregated views.

Caution

Keep in mind that every application counts toward the application quota for pricing. That could also be a reason to model applications using a flat hierarchy without parent-child relations and to forego the aggregation capability.

The application fact sheet has two recommended subtypes when activating additional capabilities:

- **AI agent**

  AI agents are prompted but autonomous systems using large language models (LLMs) to interact with their environments (e.g., applications) by performing complex tasks and to achieve a user-defined goal without explicit direction given. AI agents usually perform business tasks and pursue goals relevant to the business model of the organization and therefore create business value.

  When the AI agent feature is activated, then the AI agent subtype under the application fact sheet is created. You can activate the AI agent extension via the **Optional Features and Early Access** menu item in the **Administration** menu or via a support ticket. This might change in the future, so always check the SAP LeanIX user documentation for the latest information regarding how to activate certain features.

  Ideally, an AI agent is connected to the relevant business applications it originates from. It can have its own specific underlying IT components and connections to other AI agents or applications via logical interfaces.

  To avoid lots of manual work, we recommend using the AI agent discovery capability of SAP LeanIX to keep the agent repository as up to date as possible.

- **Microservice**

  Microservices are small, independently deployable, self-owned software components that provide functionality to self-built applications or feature extensions and can be consumed by multiple applications or services.

  The microservice subtype can be created and maintained manually, but it makes the most sense to use it with the SAP LeanIX Technology Risk and Compliance product. It can

then be provisioned with activation of the GitHub Enterprise integration for microservice discovery.

In general, microservices are related to their corresponding logical or business application as they usually don't perform entire business tasks and can't function as standalone components.

For more details on this application subtype, refer to Chapter 9.

Caution

Keep in mind that in general, application subtypes also count toward the application quota. However, there might be exceptions for certain SAP LeanIX recommended subtypes. Check with your account executive about the most recent pricing rules before pursuing any meta model extension for the application fact sheet.

When modeling microservices in SAP LeanIX, ensure that modeling happens on a sensible level. SAP LeanIX is an enterprise architecture solution, not a CMDB, and users shouldn't be overwhelmed by too much detailed information that isn't relevant for decision-making.

2.2.3 Business Capability

Business capabilities mirror the capabilities an organization needs to fulfill its business requirements. They represent *what* an organization does but not *how* it is done. Business capabilities use business terms that can be understood by every employee and are again abstractions. They should be defined in a collaborative approach between IT and business. To define business capabilities, you can create a *business capability map* following these best practices:

- They should be designed in such a way that they are relatively stable over time, provide guidance for responsibility assignment, and support decision-making.
- It's easiest to start with the high-level core capabilities on level 1 and then break down to lower levels as needed.
- Always ensure that business capabilities are mutually exclusive to prevent confusion among SAP LeanIX users later.
- Also ensure that they truly represent capabilities and not end-to-end processes.

It's possible to import an existing business capability map using the **Excel Import** functionality. If your organization doesn't have a business capability map yet, SAP LeanIX can import the SAP reference architecture content, which contains curated business capability sets. The business capability reference catalog in SAP LeanIX is only accessible by admins. The broad template capability map can be filtered based on industries, relevant end-to-end processes, enterprise domains, and more. The SAP Reference Business Architecture capabilities go down to level 3 and, if desired, suggested SAP applications can be made visible. To navigate to the business capability reference catalog, click **More** in the top ribbon menu

and expand the **Reference Catalog** menu item, then select **Explore Business Capabilities**, as shown in Figure 2.20. You'll reach the business capability explorer shown in Figure 2.21.

Read Chapter 4, Section 4.2.1 for more detailed information on how to use the business capability reference catalog.

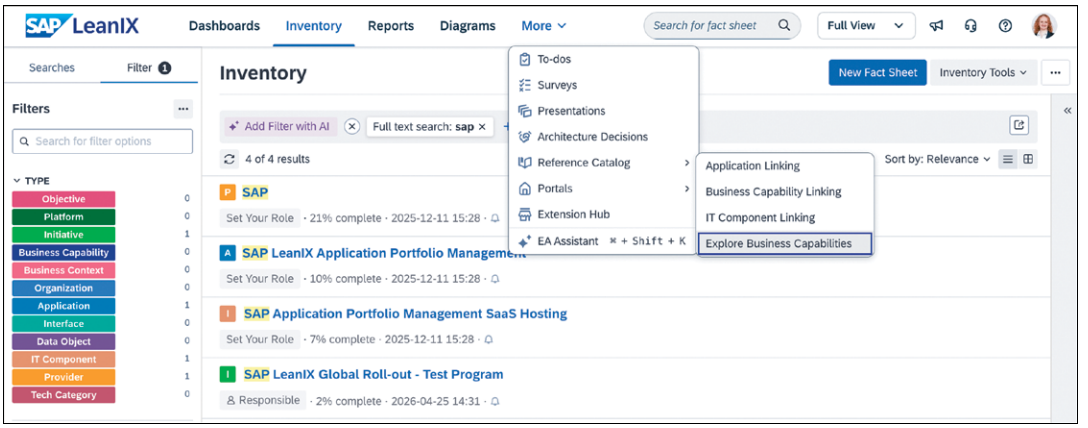


Figure 2.20: Navigating to the Business Capability Explorer

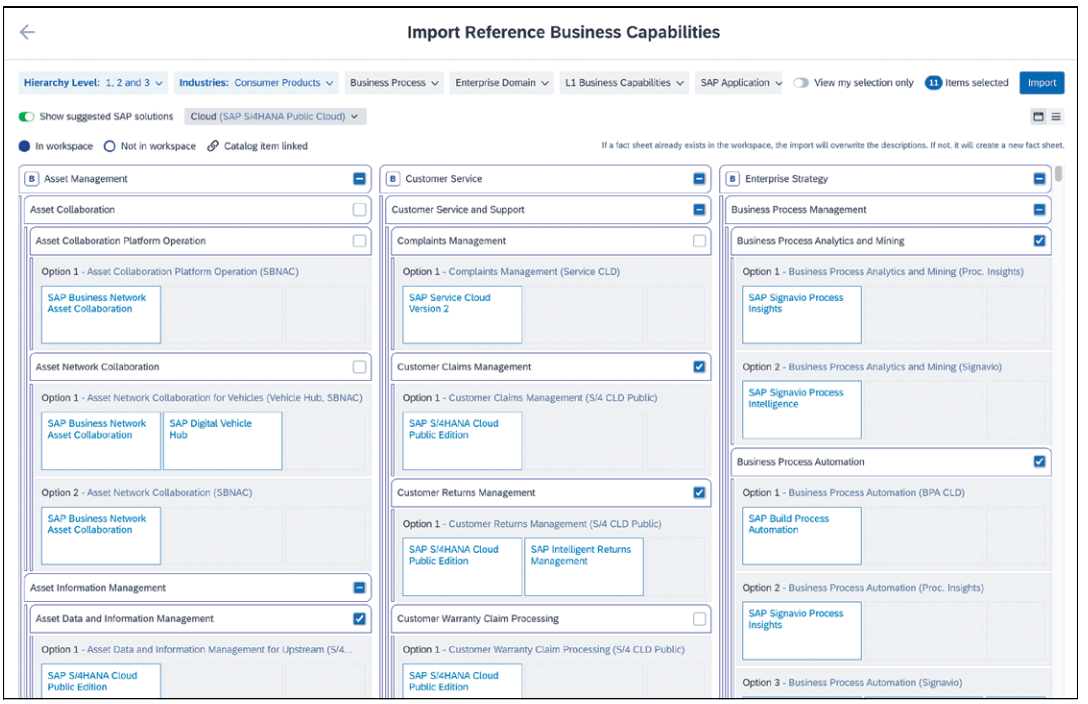


Figure 2.21: Overview of Business Capability Explorer in SAP LeanIX

Further Resources

For more information on business capabilities and examples of antipatterns, visit the SAP LeanIX user documentation at *http://s-prs.co/v620608*.

2.2.4 Organization

The organization fact sheets represent different dimensions of potential organizational structures in an organization. The out-of-the-box subtypes are as follows:

- Legal entity (e.g., SAP Germany)
- Region (e.g., North America)
- Business unit (e.g., product and engineering)
- Team (e.g., Team Overtake)
- Customer (e.g., buyer persona)

Just because these subtypes exist doesn't mean that every customer must use all of them in their SAP LeanIX workspace. Choose the ones that best fit your reporting and structuring purposes and are common and known dimensions among employees. It's also possible to rename or delete subtypes or create additional ones, if the predefined examples do not suit your organizational design.

As a best practice, SAP LeanIX recommends using as few subtypes as possible. Experience shows that if you aren't syncing the organizational dimensions from third-party source systems, updating the hierarchy manually might be very cumbersome after restructuring initiatives. The deeper you go into parent-child hierarchical structures, the more items you need to maintain manually. Therefore, stay as high level as possible while still providing enough depth for decision-making.

For matrix organizations, it's possible to create a nested hierarchy structure, for example, with the region as level 1 and business units as level 2 or vice versa. Because the design will have a significant impact on the reporting axis that you can later create in SAP LeanIX reports, we recommend that you think through different options carefully and create example reports to verify which reporting axis might be desired by senior leadership and other stakeholders.

Further Resources

For more information, check out the SAP LeanIX user documentation at *http://s-prs.co/v620609*.

If you're using SAP SuccessFactors, then you can automatically import your organizational structure using the out-of-the-box integration: *http://s-prs.co/v620610*.

2.2.5 IT Component

IT components include services, software, hardware, underlying SaaS hosting, platform as a service (PaaS), or infrastructure as a service (IaaS), as well as AI models that are needed to run or deliver an application.

Maintaining IT components can provide crucial insights into the following:

- Obsolescence risk and technical debt
- Operating costs
- Provider dependencies
- Location management
- Hosting structure

As a good starting point, you should only model what you need for a specific use case. For instance, to start, only model the IT components that have a relation to an active application in the SAP LeanIX workspace. Focus on the most important components; don't try to boil the ocean by bringing in all instances and deployments of legacy technology.

Note

Applications and IT components exist in a kind of symbiosis. That sometimes makes it difficult to decide whether something is an application or an IT component.

Operating systems, databases, virtual machines, hosting, technology services, and the like are typical examples of IT components. Take SAP LeanIX as an example. SAP LeanIX is the SaaS software modeled as an application. The corresponding IT component would be the SAP LeanIX SaaS hosting with the SAP provider. If your quoting tool is an Excel file with lots of formulas, then the quoting tool would be the application, and your specific version of Excel would be the corresponding IT software component related to the Microsoft provider. An application can also be connected to multiple IT components, such as the technical version and the on-premise hosting server, which could also come from a different provider.

IT components usually are named and referenced by their software release version, for instance, Spring Boot 3.4. Spring Boot is the IT component name entered in the corresponding **Name** field and represents the versionless IT component. The version number, 3.4, is optional information and can be entered into the **Release** field on the fact sheet. It specifies the version in the format *major_version.minor_version*.

Try to use as much automation as possible for IT component creation and modeling in SAP LeanIX. When using SAP LeanIX discovery capabilities such as SaaS discovery, SAP landscape discovery, SAP extension discovery, tech stack discovery from an SBOM, or creation from application reference catalogs, a good amount of IT components can be automatically detected in the discovery inbox and created plus linked to the IT component reference

catalog for you. (Note that vendor lifecycle data is only available when you have purchased the SAP LeanIX Technology Risk and Compliance product.)

Figure 2.22 shows the settings of the application reference catalog in the **Administration** area, under **DISCOVERY AND INTEGRATIONS**, in the **Application** tab under **Reference Catalog**. The autocreation of IT components can be activated or deactivated when applications are created from the reference catalog by checking or unchecking the respective box.

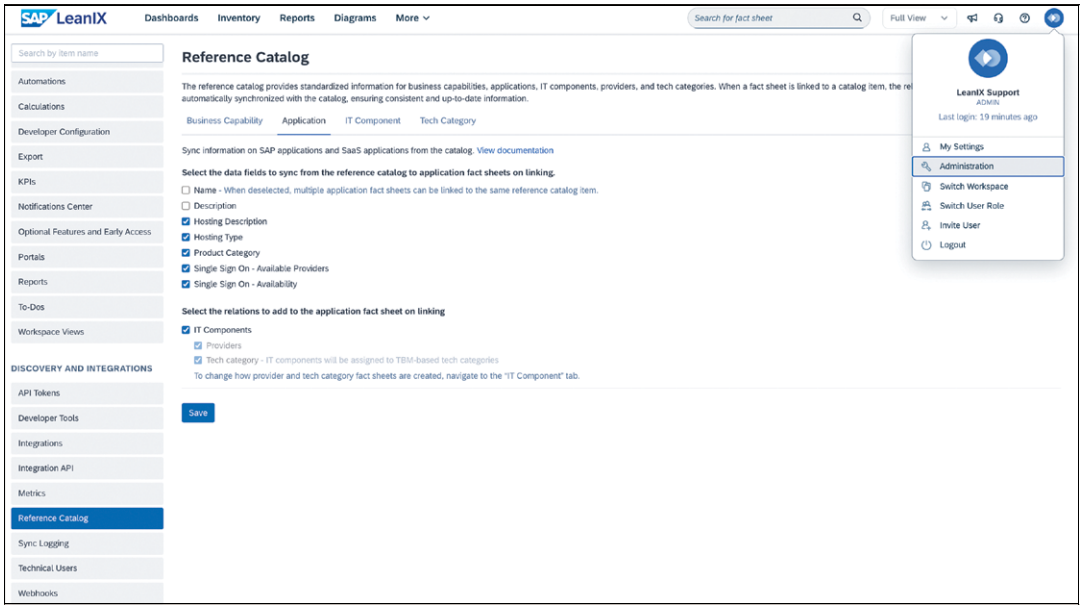


Figure 2.22: SAP LeanIX Application Reference Catalog: Settings for IT Component Autocreation

Nonetheless, as a human in the loop, you should review the **Discovery Inbox** under **Inventory Tools** (see Figure 4.11 in Chapter 4, Section 4.2.3) regularly as well as check for completeness and fill in gaps that cannot be automatically detected and created. We'll cover this in more detail in Chapter 4, Section 4.2.3. Integrations with CMDBs such as ServiceNow can also help with gathering IT components via the out-of-the-box integration.

> **Note**
>
> Remember that the ServiceNow integration is only available with the SAP LeanIX Technology Risk and Compliance product.

When modeling IT components manually, consider the following best practices:

- Start with versionless IT components if you have no existing repository, and detail major versions in a next step.
- Consider carefully for which use cases you need minor versions.

- Stay as high level and aggregated as possible for decision-making and insight generation to reduce possible manual maintenance and update work in the long term.
- Avoid modeling physical instances but stay on an aggregated logical level to not overcrowd the workspace.

The predefined subtypes of IT components include the following:

- SaaS (e.g., SAP LeanIX SaaS hosting)
- PaaS (e.g., SAP HANA Cloud, SAP Build)
- IaaS (e.g., Amazon Web Services [AWS])
- Software (e.g., SAP S/4HANA 2025; SAP S/4HANA would be the corresponding application)
- Hardware (e.g., IBM Power S1124)
- Service (e.g., maintenance/support service by third party; so-called managed IT services to implement or run an application)
- AI model (e.g., Claude, Gemini, GPT)

Further Resources

For more information, refer to the following SAP LeanIX user documentation pages:

- IT component modeling guidelines: *http://s-prs.co/v620611*
- IT component lifecycle catalog: *http://s-prs.co/v620612*
- How to create a fact sheet manually: *http://s-prs.co/v620613*

2.2.6 Provider

The provider fact sheet is kind of an extension of the IT component fact sheet, indicating from which provider/vendor a technology component was purchased. The creation of the provider fact sheet can also mostly be automated when you use the SAP LeanIX discovery capabilities and link IT components to the IT component reference catalog.

As shown in Figure 2.23, you can enable the autocreation of providers by going to the **Administration** area. Under the **DISCOVERY AND INTEGRATIONS** section, select the **Reference Catalog** menu item, go to the **IT Component** tab, and select the checkbox in the **Relation to provider** section.

Why is the provider fact sheet so important? First, you can use various SAP LeanIX template reports to visualize the dependency level of providers. Second, for the relation of IT component and applications, SAP LeanIX users can capture total annual cost, which can then be aggregated per provider in the **Provider Cost** report. You can find this by selecting the **Reports** option in the top ribbon menu bar, then selecting the **Cost reports** category under the **REPORT TYPES** section, as shown in Figure 2.24.

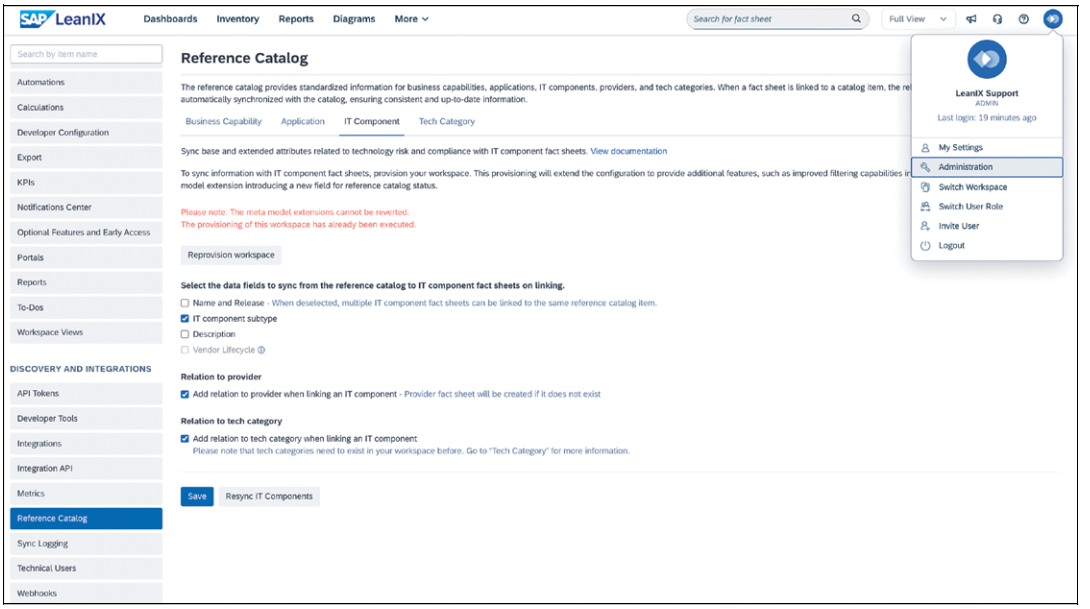


Figure 2.23: IT Component Reference Catalog Settings to Manage Provider Autocreation

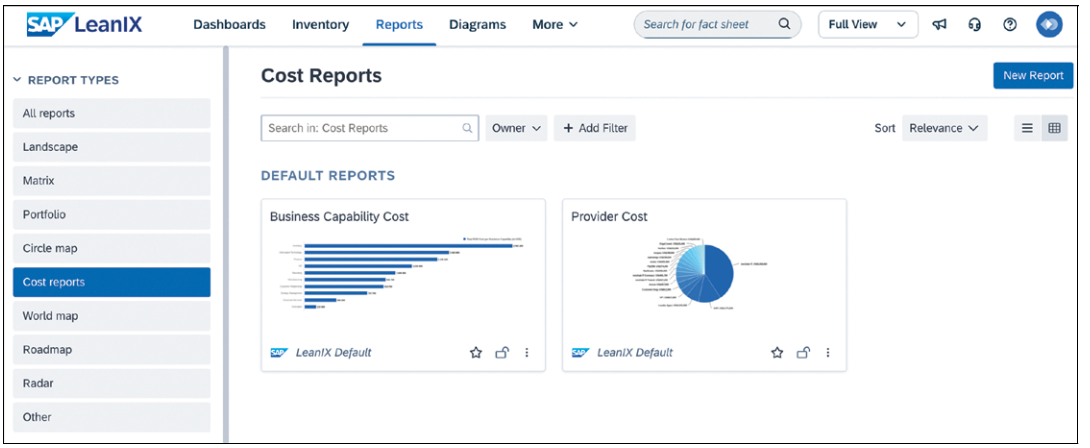


Figure 2.24: Navigation to Predefined Provider Cost Report

2.2.7 Tech Category

Tech categories are used to classify and group IT components into standardized technology categories.

Companies can of course import their own tech categories, such as via Excel imports (see Chapter 4, Section 4.2.6 for more information). However, when using the recommended SAP LeanIX standard for tech categories, you can benefit from a few features that automate the linking between IT components and tech categories. The tech category model, similar

to the business capability model, is quite stable over time and independent of industries. If you use your own tech category model, ensure the following aspects:

- *Breadth before depth:* It is better to have a wider map rather than a deeper map.
- *Don't overlap:* Tech category maps should be mutually exclusive and collectively exhaustive at all levels

If you want to explore the SAP LeanIX recommended standard, first navigate to the **Administration** area. Under the **DISCOVERY AND INTEGRATIONS** section, select menu item **Reference Catalog** and tab **Tech Category**. Here, admins can review and import selected tech categories of the TBM taxonomy (see Figure 2.25).

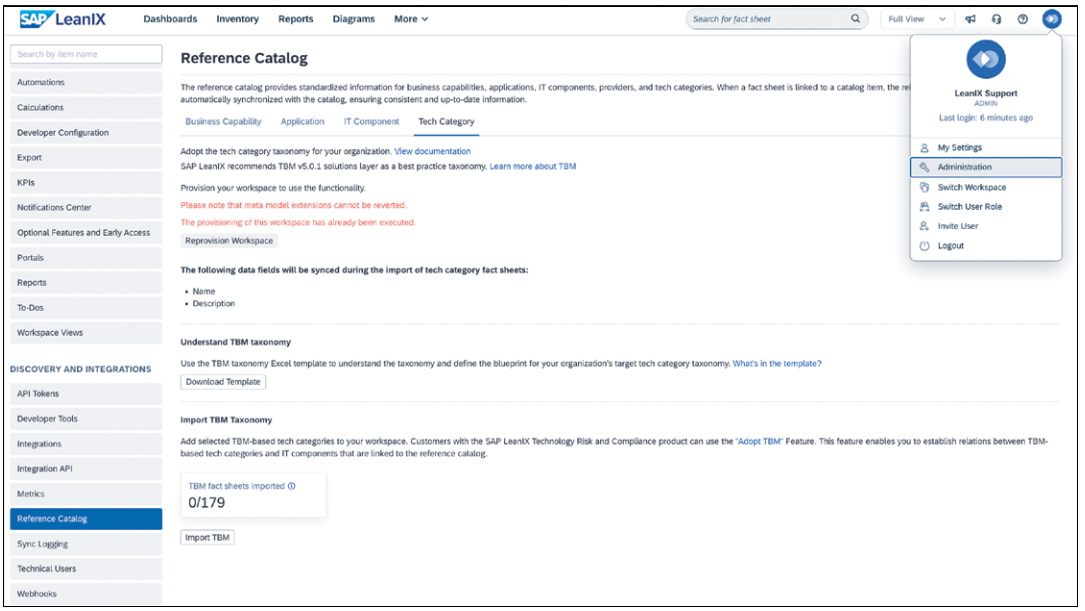


Figure 2.25: Tech Category Reference Catalog in Administration Area

Note

The TBM taxonomy is an open standard that is also used by the SAP LeanIX catalog research team.

Once you have reviewed the TBM catalog by downloading an overview (use the **Download Template** button under the **Understand TBM taxonomy** section) and then selecting the tech categories in scope and importing them to the SAP LeanIX workspace with the **Import TBM** button, you can configure the IT component reference catalog so that when an IT component is linked to the catalog, the relation to the tech category is automatically created.

To check the IT component reference catalog settings, switch to the neighboring **IT Component** tab in the **Reference Catalog** admin overview and ensure that the checkmark is set in

the **Relation to tech category** section. Remember to click the **Save** button in the lower-left corner of the middle window area if you changed anything in the settings (see Figure 2.26).

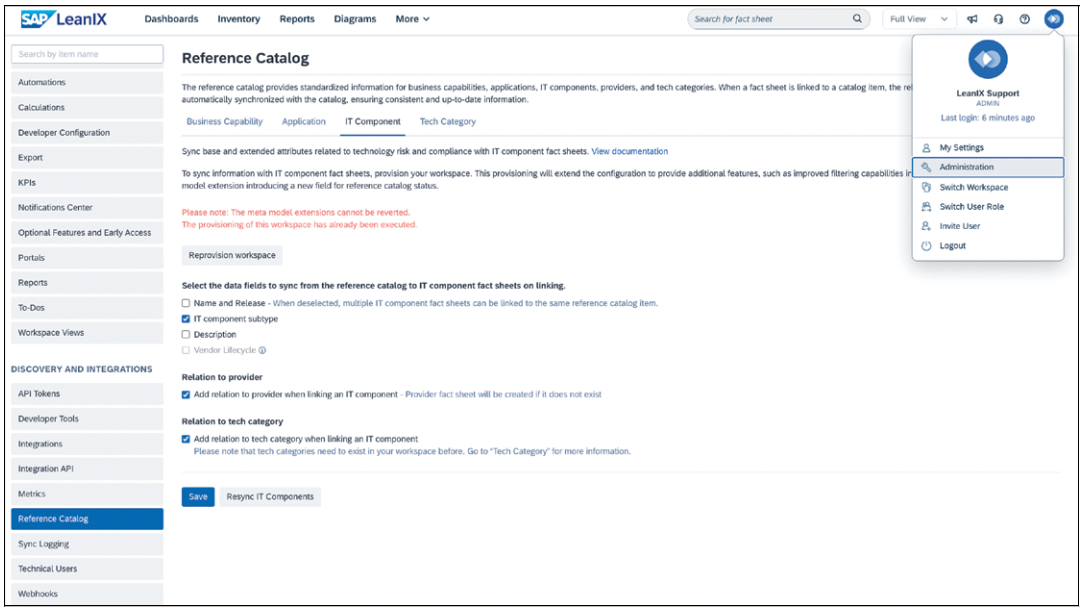


Figure 2.26: IT Component Catalog Tech Category Autolinking Settings

It's also possible to modify the TBM tech categories in the SAP LeanIX workspace by adding additional custom tech categories manually as fact sheets (see Chapter 4, Section 4.2.7). Just remember that if you add new categories, then they need to be manually maintained as the additions are not known nor included by the SAP LeanIX catalog research team.

2.2.8 Interface

The interface fact sheet is a delicate fact sheet type that's often implemented in a way different than originally intended, which might then impact the visualization opportunities in reports and diagrams in the SAP LeanIX workspace.

In SAP LeanIX, the interface is the *logical, business-oriented* interface, not the technically implemented interface. Therefore, it's a connection not between IT components but between logical applications. The logical interface relies on IT components and is implemented by IT components, which then provide insights into the middleware, software, services, and formats used.

The interface circle map in the **Reports** section only visualizes interfaces between application fact sheets. The same applies to the data flow diagram, which only functions with interfaces between applications.

SAP LeanIX suggests three different subtypes to capture different styles of interfaces:

- **Logical interface (business-oriented modeling)**
  Provides the connection and data flow between applications. Used to model communication patterns.
- **API (technical data flow dimension)**
  Provides an overview of available technical endpoints:
  - Connections between microservices (an application subtype for self-built software management)
  - If needed, system-to-system integration (the system is an optional fact sheet type; see Section 2.2.9)
- **MCP server**
  A collection of managed communication endpoints that expose specific information to AI capabilities or systems using standardized protocol interfaces. Typical modeling scenarios include the following:
  - Intelligent agent interactions
  - Protocol-based communication
  - Endpoints and access controls

In SAP LeanIX, interfaces show two dedicated types of relations to applications on the fact sheet:

- The provider application (can only be one)
- The consumer application(s) (can be multiple)

Interface Modeling False Friends

From interface provider to interface consumer is *not* the direction of the data flow within the interface.

The *interface provider* is the application that is the owner of the business logic, including change management, that triggers the data push or pull request. This can only be initiated by one application. The *consumer*, to which requests are sent, can be multiple applications consuming the data push or pull request.

Why is that important?

Whenever the scope or technical specification of an interface connection is updated, the interface owner must inform all impacted stakeholders down- or upstream. Changes can either occur on the logical interface level (e.g., the method for data push or data pull requests changed) or on a technical level (e.g., the API updated its authentication method). Both responsibilities can be captured in SAP LeanIX via the provider application and the responsible subscribers on a fact sheet for the interface subtypes logical interface and API.

Data objects can be related to applications, where create, read, update, delete (CRUD) rights are specified for the relation. Data objects can also be related to interfaces to indicate that an interface is transporting certain types of data.

Some interface-specific attributes are captured in the fact sheet data under the **Properties** section (see Figure 2.27):

- **Data Flow Direction** indicates whether data is **Incoming** into the interface provider application, **Outgoing** from the provider application, or the flow is **Bi-Directional**.
- **Interface Type** specifies whether the data exchanges happen in a **Synchronous**, **Asynchronous**, or **Batch** manner.
- **Frequency** shows how often the integration runs: hourly, daily, weekly, monthly, yearly, in real time, or on demand.

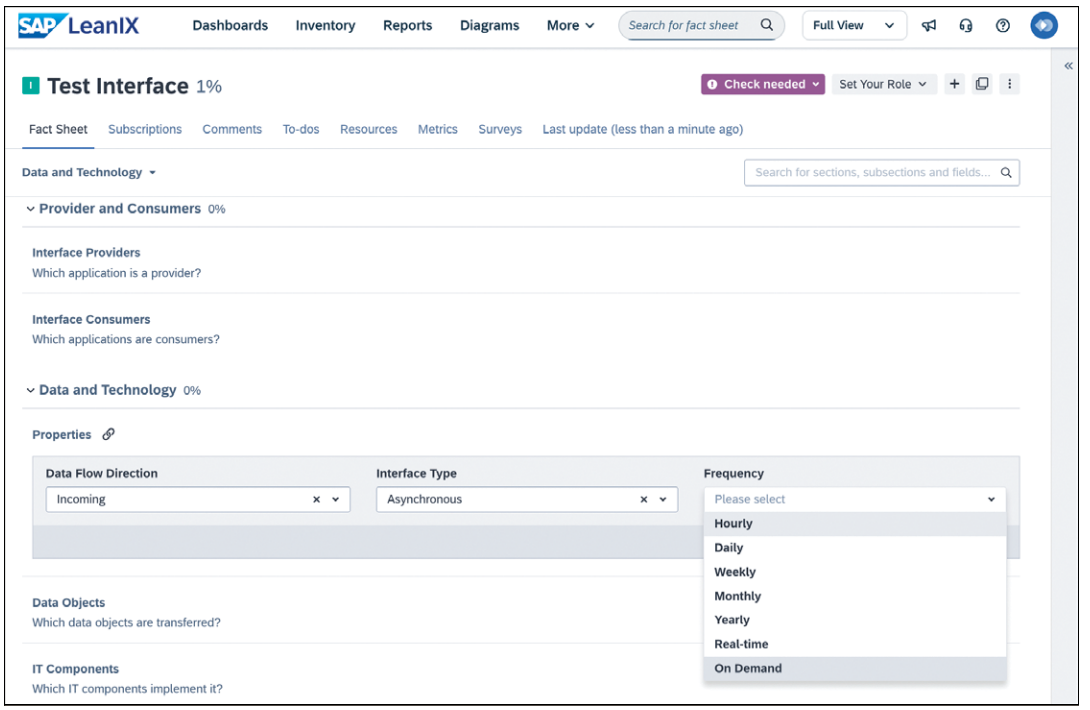


Figure 2.27: Interface Properties on Fact Sheet Details

Start at a high level with logical interfaces. For example, say that you have an interface established between SAP LeanIX and SAP Signavio, and SAP LeanIX is the provider application. It could happen that once you or the interface owner enters the detailed information into the fact sheet sections, you realize that different properties are needed for different data use cases. For example, in your integration, you sync processes from SAP Signavio to SAP LeanIX but application data from SAP LeanIX to SAP Signavio. With simplified modeling, you would mark the interface as **Bi-Directional** and add the data objects process and

application without specifying the exact data flow direction per data object. However, it might be important during a transformation to know the exact data flow direction per data object. In this case, you would duplicate the interface and have one interface variant with the data flow direction incoming that has the process data object related to it and one interface variant with the data flow direction outgoing with the application data object related to it. Carefully analyze whether you need that level of detail in the enterprise architecture software for transformation planning and decision-making, and consider cleaning up and aggregating information after executed transformations.

SAP LeanIX can provide high-level insights into solution architecture, but it isn't a specialized solution architecture software. We do not recommend modeling the detailed technical data flow between systems and IT components in SAP LeanIX. The logical interface level between logical applications is the preferred modeling recommendation. If differentiation between properties is needed, create variants of the same logical interface for different use cases. For this, ensure clear naming convention guidance is in place so that any colleague can understand the scope of the logical interface modeled.

Further Resources

For more detailed examples, check out the SAP LeanIX user documentation at *http://s-prs.co/v620614*.

2.2.9 System

The system fact sheet is an optional meta model extension that is used in the SAP discovery feature or in ServiceNow integrations. It represents the deployment environment (production, quality, test, etc.) and is a technical instance of a logical application.

Systems can become handy in two SAP LeanIX capabilities:

- **SAP landscape discovery**
  Systems are an additional discovery capability in SAP landscape discovery. They need to be actively turned on and can then be autodetected and created via the discovery inbox (accessed via the **Inventory Tools** option). This is especially helpful for bigger SAP transformations.
- **ServiceNow**
  System fact sheets correspond to service instances in ServiceNow and can be synced to the SAP LeanIX workspace to bring transparency into risk management. (This option is only available with SAP LeanIX Technology Risk and Compliance.)

The system fact sheet captures information such as environment category (development, production, testing, etc.), deployment models (public cloud, private cloud, on-premise), and instance-level information.

Note

It's best to only activate the system fact sheet if you plan to have it autofilled by SAP landscape discovery or the ServiceNow integration. We don't recommend maintaining systems manually in the SAP LeanIX workspace.

To activate the system fact sheet, first navigate to the **Administration** area. In the left-hand side menu under the **ADVANCED SETTINGS** section, click **Optional Features and Early Access**. In the middle window, scroll down to the **Use Case Extensions** section and find the **System Fact Sheet** paragraph. Click the **Review and Activate** button, as shown in Figure 2.28.

You can activate SAP landscape discovery (see Chapter 4, Section 4.2.3) with or without system detection. To ensure that the system fact sheet discovery function is turned on, select the checkbox denoting it as in scope during the integration setup (this box is not checked by default; look ahead to Chapter 4, Figure 4.9).

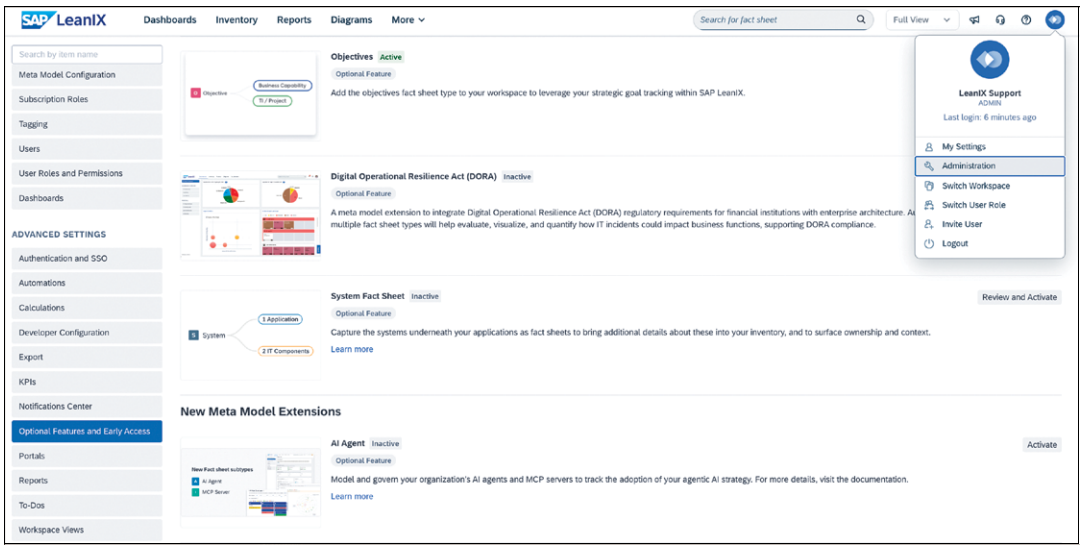


Figure 2.28: System Fact Sheet Activation in Administration Area Under Optional Features

2.3 Enterprise Architecture Features

SAP LeanIX is meant to be a collaborative, open, and transparent solution to collaborate across departments on enterprise architecture. Every employee engages daily with artifacts of the company's application and IT landscape, often directly by using programs or indirectly by consuming program outputs. It's in everyone's interest to have a reliable repository with high-quality data in order to understand the complex ecosystem and interdependency of solutions.

In this section, we'll look at a few SAP LeanIX features that will help enterprise architecture teams engage via the SAP LeanIX workspace with different stakeholders across the organization.

2.3.1 Subscriptions and Data Quality Governance

Having an enterprise architecture repository that is available and easy to understand is a huge benefit, but its data is only useful if the right data is maintained and up to date when needed for decision-making.

Therefore, in general, try to get as many artifacts as possible imported in an automated or semiautomated way via the discovery and integration features into source systems. To avoid duplicate data maintenance in different solutions, try to assign contact persons for each artifact directly from the source system if the necessary information is available. Some manual data maintenance might be inevitable in the SAP LeanIX workspace; keep that in mind when designing the authorization concept.

Fact sheet subscriptions are an essential feature that will help to keep data quality and accountability high. They assign responsibility and accountability to individual users on a fact sheet level for data maintenance. For guidance on how to configure subscription roles as an admin, check out Chapter 3, Section 3.3.3.

SAP LeanIX notification settings allow users to define when they want to be notified via email about changes on those fact sheets to which they have been assigned as responsible persons. This provides them with a clear call to action. Admins can predefine the available options in the **Administration** area. For more information, see Chapter 3, Section 3.3.3.

Ensure that all stakeholders who will be assigned as responsible persons to fact sheets know of their role in maintaining the overall data quality; prepare targeted training material for them. Try to keep the information as concise as possible and remember that the data maintenance in SAP LeanIX should be designed to be as easy as possible in order to encourage active engagement without taking too much time from other urgent business tasks. Therefore, only collect the data that you really need for decision-making. We do not advise collecting data just for the sake of data collection. On a regular basis, assess your data needs for your key use cases; if fields are no longer needed, back up the data and clean up the meta model or adjust the weights for the completion score (see Chapter 3, Section 3.3.3 on how to configure this feature).

The quality seal is also a useful feature to ensure regular data quality reviews. The quality seal can be activated by admins per fact sheet type in the meta model configuration. In day-to-day business, the persons responsible can set the quality seal to **Approved** when they have entered all required and mandatory information. A time period (monthly, per quarter, per half year, per year) can be set by the admins; after this period, the quality seal status will automatically change to **Check needed**, which triggers a notification to the person responsible on the fact sheet subscriptions to review the data, make needed updates, or confirm still valid data.

2.3.2 To-Dos and Comments on Fact Sheets

Another way to collaborate and exchange information on fact sheets in your SAP LeanIX workspace is via the **To-Dos** and **Comments** capabilities on individual fact sheets.

By default, every user can create, read, and update comments. This can be restricted by admins in the respective fact sheet type meta model configurations (see Chapter 3, Section 3.3.3 for more information).

To-dos and comments are always fact sheet–specific and have their own tabs on the fact sheet overview. To-dos can be used to delegate tasks via the **Add Action Item** or **Ask Question** buttons, as shown in Figure 2.29.

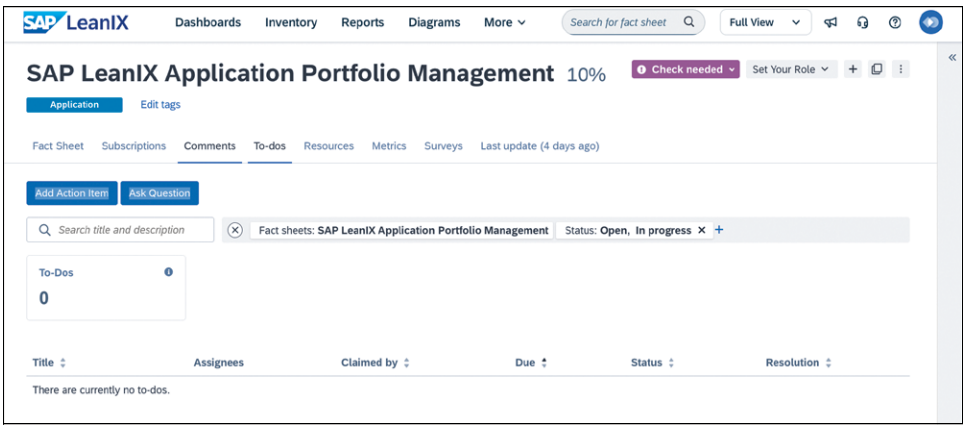


Figure 2.29: Comments and To-Dos Tabs in Fact Sheet Information

To-dos can be assigned to any workspace user. Either this user or a different user can claim the task, reassign the task, and ultimately choose to **Mark as Complete** via a click of a button (see Figure 2.30).

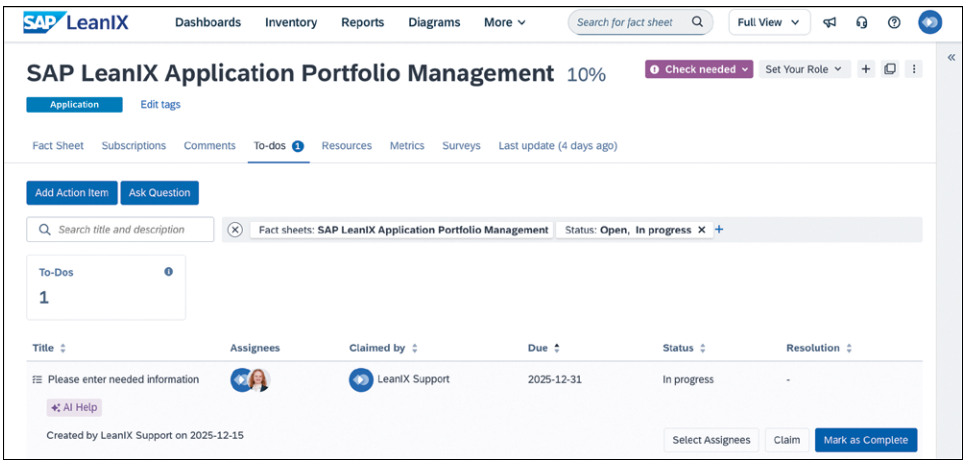


Figure 2.30: To-Do Management on Individual Fact Sheets

Admins have a full overview of all to-dos in the **Administration** area under the **ADVANCED SETTINGS** section and the **To-Dos** menu item (see Figure 2.31). There, admins can also perform to-do cleanup tasks on behalf of users if needed.

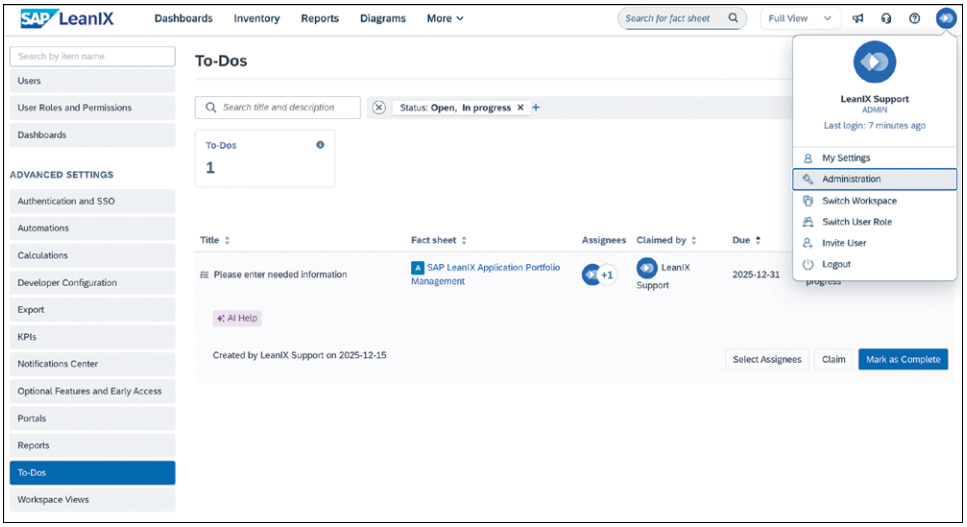


Figure 2.31: To-Do Management in Administration Area

Further Resources

For more information about and examples of working with to-dos, visit the SAP LeanIX user documentation at *https://help.sap.com/docs/leanix/ea/to-dos*.

2.3.3 Surveys

Another good way to verify information in fact sheets or crowd-source information is via the **Surveys** option, which can be found in the SAP LeanIX workspace top ribbon under **More**. Surveys are a good alternative to sending out individual emails or chasing colleagues in an organization via chat functionalities for information.

This feature requires subscription roles to be entered in fact sheets as they are used to determine the survey addressees.

Further Resources

For the latest information on surveys, check the SAP LeanIX user documentation at *https://help.sap.com/docs/leanix/ea/surveys*.

Admins can define in the **Administration** area which roles are allowed to design, send, and analyze surveys. By default, this feature is only available for admins and actively must be

made available for other roles. For that, navigate to the **BASIC SETTINGS** section and select the **User Roles and Permissions** menu item (see Figure 2.32).

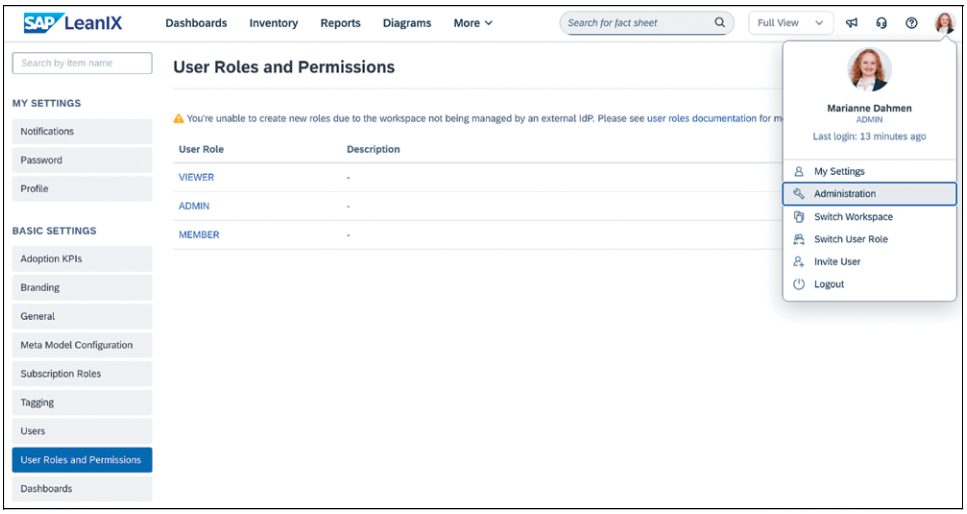


Figure 2.32: User Role Management in Administration Area

Once there, click the **MEMBER** user role link in the middle table, then click the **Permissions** tab in the upper ribbon, as shown in Figure 2.33.

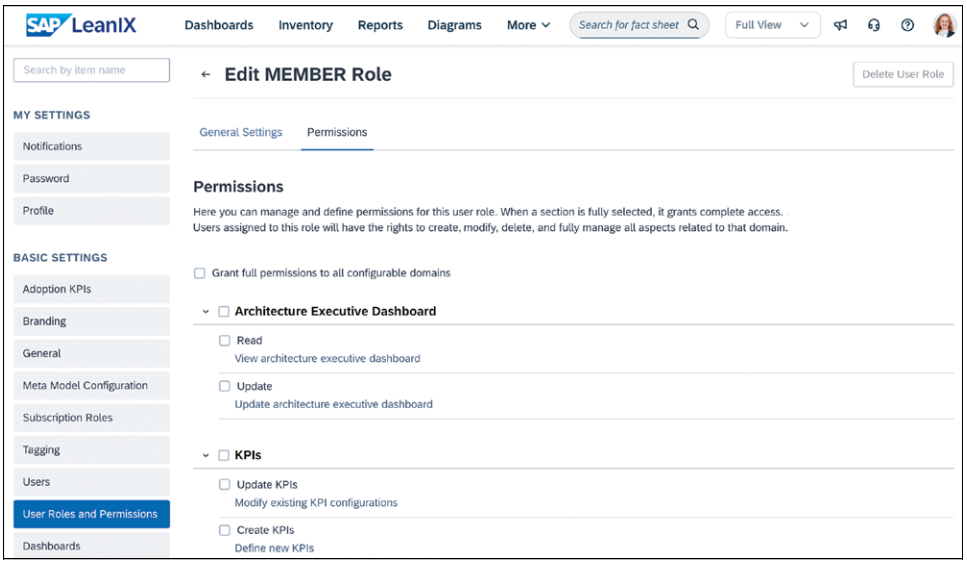


Figure 2.33: MEMBER User Role Permissions Update in Administration Area

Scroll down until you reach the **Surveys** section, then check the checkbox next to **Manage Surveys** if you want to grant member access to the survey management capability. Don't forget to save your changes at the bottom by clicking the **Save Changes** button.

To design a survey, click the **More** button in the top ribbon and select **Surveys** (see Figure 2.34).

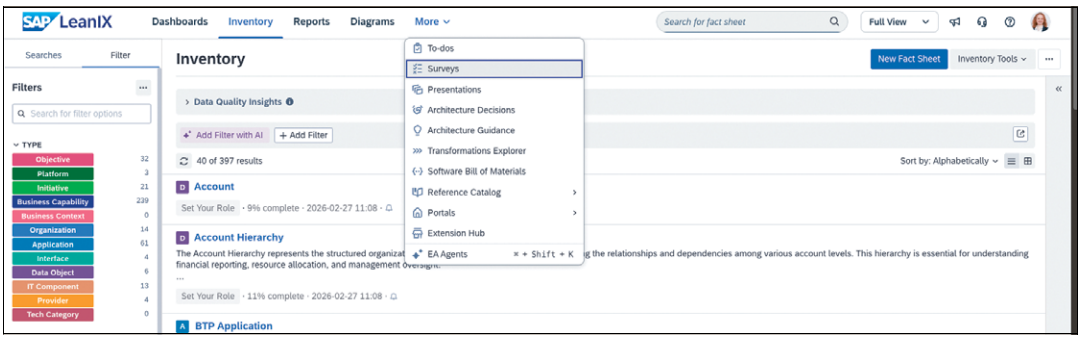


Figure 2.34: Navigating to Survey Management Area

Further Resources

At the time of writing, the SAP LeanIX product and engineering team was still in the process of designing and testing a new way of creating surveys assisted by artificial intelligence.

For the latest information on this feature, see the SAP LeanIX public roadmap and the SAP LeanIX online user documentation:

- Public roadmap (search for "survey"): *https://roadmap.leanix.net/tabs/10-on-roadmap*
- User documentation: *https://help.sap.com/docs/leanix/ea/surveys*

You will be directed to the **Surveys** management overview page. On the left-hand side, you can switch between **Assigned To Me**, for those assigned to you as a user, and **Manage Surveys**, where you can design and manage new surveys. In the center pane, you can filter for different surveys by **Status**; by clicking, for instance, the tile called **Total** to see all surveys; or by clicking **Draft** to only see prepared but not yet sent surveys. In the upper-right corner, you can create a new survey by clicking the blue **+ New Survey** button or click **Safety Net** to configure the related settings (see Figure 2.35).

Survey creation follows a multistep, guided process:

1. **Scope**
   Select the fact sheet type and fact sheets in scope for the survey via an inventory search.
2. **Design**
   Select the survey elements in the survey editor.
3. **Preview**
   Test a preview of your survey to get an idea of the look and feel as a survey participant.
4. **Share**
   Select the subscription roles to which the survey should be sent, check fact sheets with missing subscribers, and draft the invitation email text.

5. **Insights**
   Manage live surveys, send reminders, and close surveys.

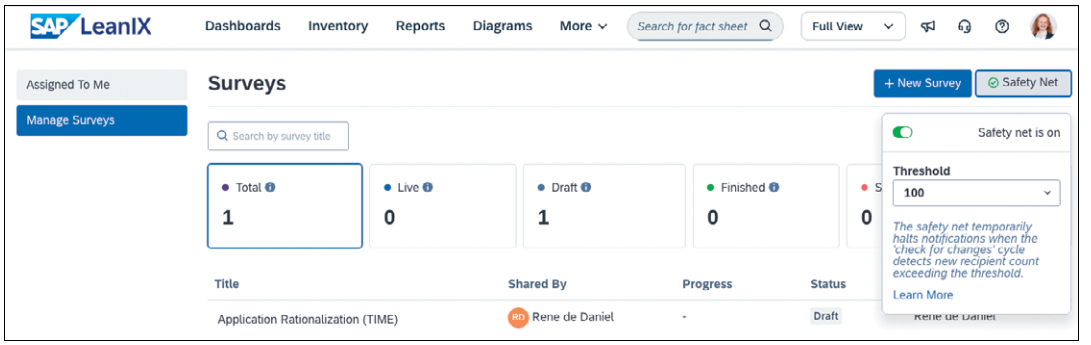


Figure 2.35: Manage Surveys Overview with Open Safety Net Settings

Figure 2.36 shows an example of the survey editor. You can either create a survey from scratch using the left-hand menu panels, which you can drag and drop onto the center area and then configure; or you can start with a template survey, by clicking the **Use Template** button in the upper-right corner.

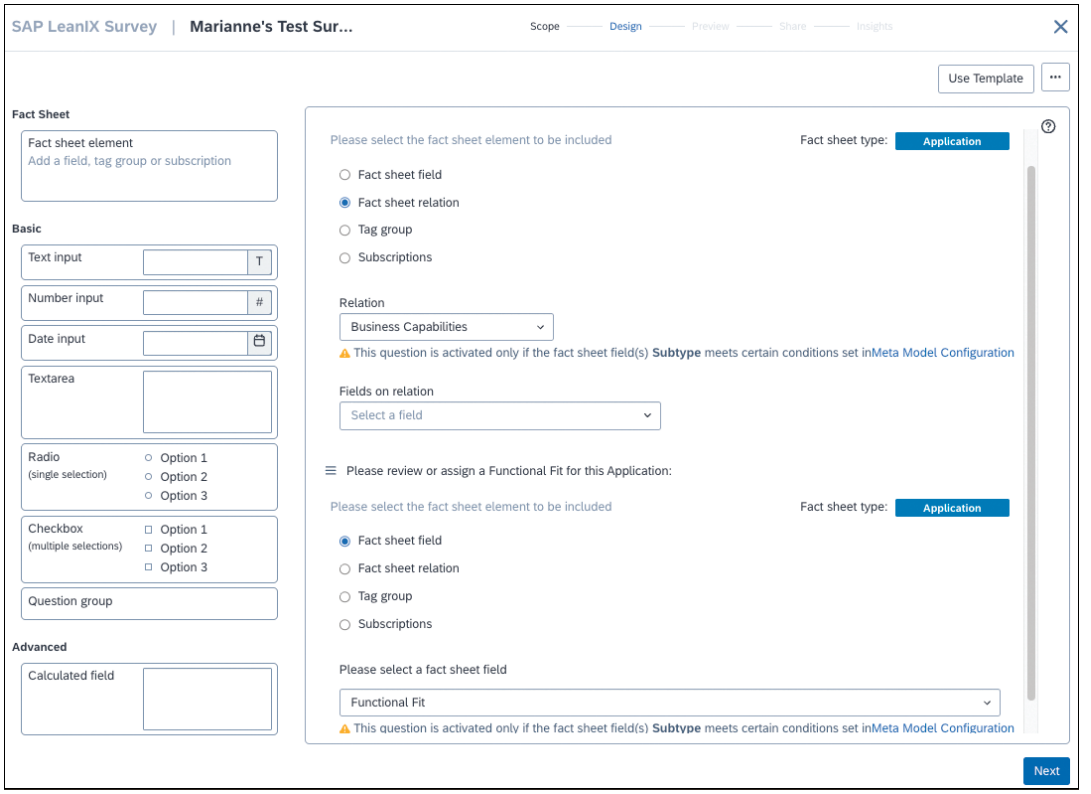


Figure 2.36: Survey Editor Example

Figure 2.37 shows the window for the **Share** step. You can only send surveys to maintained subscribers in the fact sheet. That is a hard prerequisite. You will get a warning about missing subscribers in the **Share Configuration** window in the top filter tiles. In this example, there are 10 in-scope filtered fact sheets with missing subscribers. Note that you don't have to finalize the survey in one sitting; when you click the **x** in the upper-right corner of the screen, your progress will be saved, and in the survey overview you will see this survey with the **Draft** status. Once done with the configuration, you can test the survey by using the **Test Survey** button in the lower-right corner. After a successful test and potential tweaks to the design, you can then click the blue **Go Live** button in the lower-right corner to make the survey live.

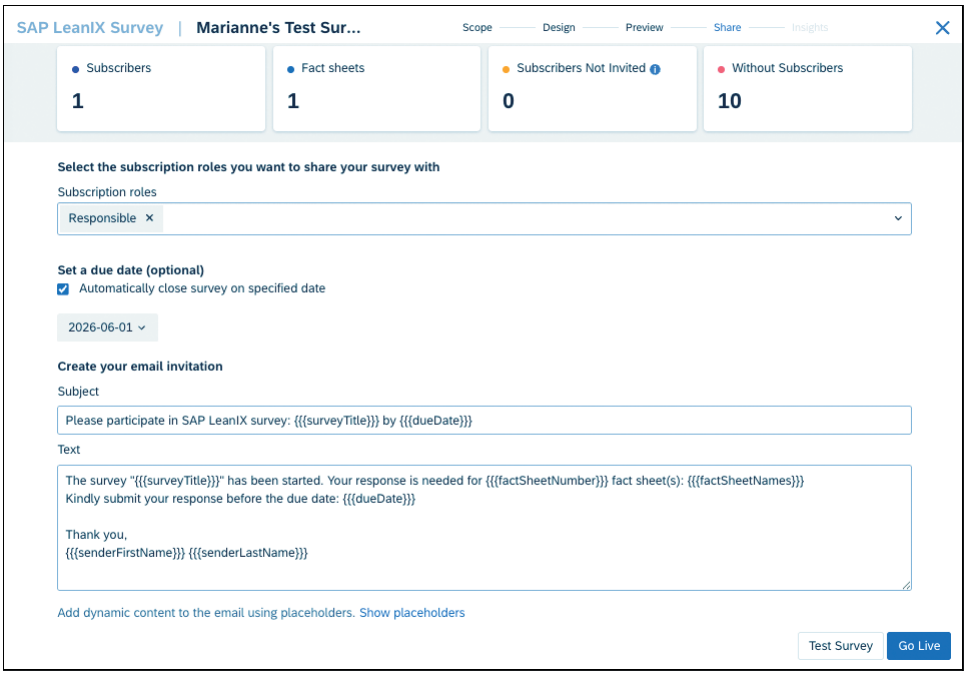


Figure 2.37: Configuring Survey Recipients and Invitation Email Text

Figure 2.38 shows features that allow you to manage running surveys. You can see the **Survey Progress**, select an option to **Send Reminder** emails, and download survey responses to Microsoft Excel (**Download .XLSX**) to manage the information in more detail.

Figure 2.39 shows an updated overview of the **Manage Surveys** tile, depicting two surveys that each have a different **Status**.

We'll revisit the topic of surveys in Chapter 7, Section 7.4, when we create an example as part of the use case.

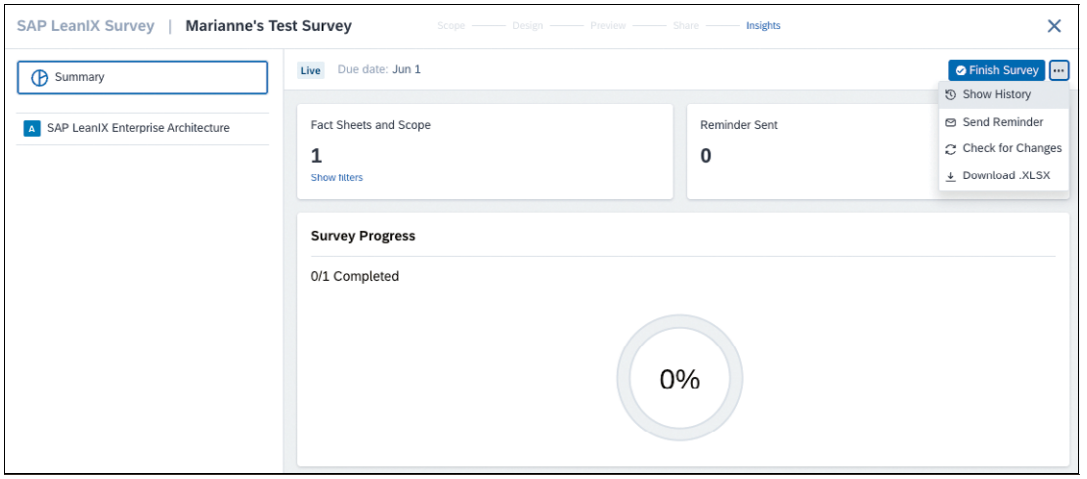


Figure 2.38: Insights Step of Survey Creation to Manage Live Surveys

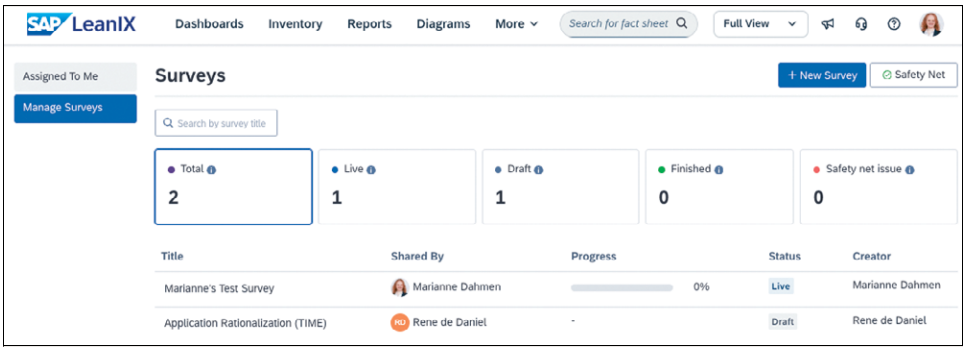


Figure 2.39: Surveys Overview with Surveys in Live and Draft Statuses

2.3.4 Workspace Views and Portals

An open and transparent SAP LeanIX workspace does risk overwhelming people with information that isn't relevant for them in their day-to-day work. SAP LeanIX therefore created features to reduce the mental load and noise for targeted stakeholder groups when working with SAP LeanIX on a casual basis.

Workspace views filter down the inventory to only selected fact sheet types that are relevant for a specific user group. They act like custom filters across dashboards, reports, diagrams, and fact sheets. This is a good method when you generally want to keep the users in the same SAP LeanIX workspace UI. Workspace views are not a method to restrict access. Users can always leave the view to navigate back to the full view. If you want to restrict access, custom roles and virtual workspaces are the features you should look into.

Workspace views can be set up and designed in the **Administration** area under the **ADVANCED SETTINGS** section, via menu item **Workspace Views** (see Figure 2.40).

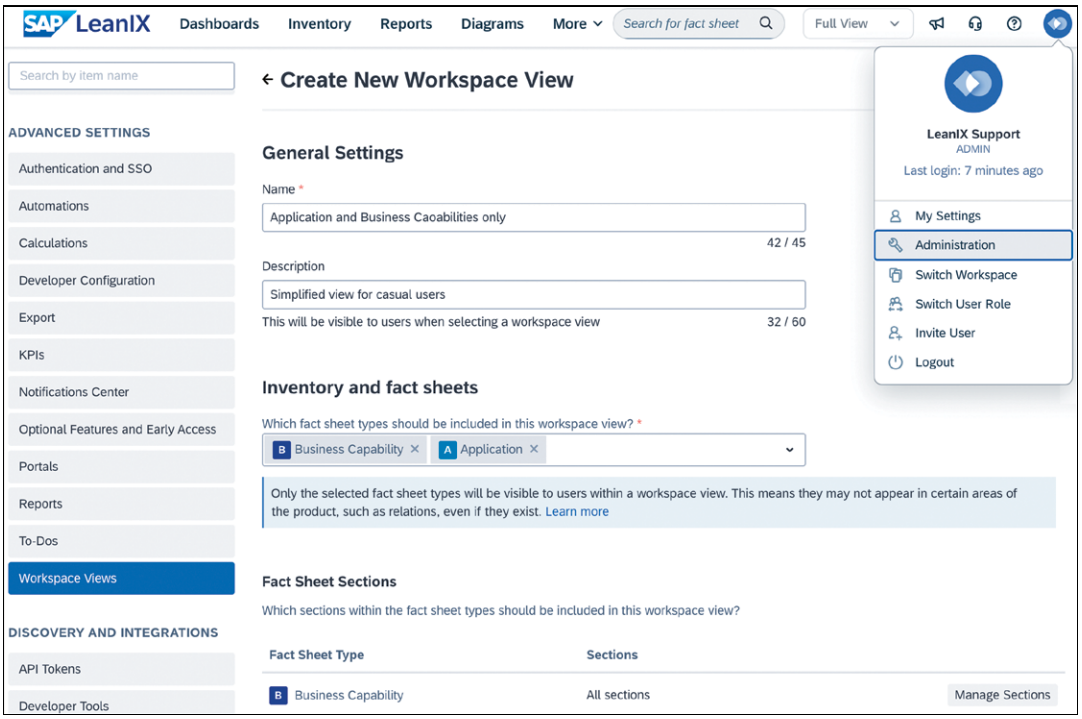


Figure 2.40: Workspace View Configuration in Administration Area

In this window, admins can configure the following items:

- **General Settings**
  - Name
  - Description
- **Inventory and fact sheets**
  - Fact sheet types in scope
  - Fact sheet sections per fact sheet type in scope
  - All fact sheets of a certain type or only a subset in scope
- **Reports, Diagrams, and Dashboards**
  - Reports in scope
  - Diagrams in scope
  - Dashboards in scope
- **Visibility**
  - Visible for everyone or for specific user roles
  - Set as default for specific user roles

You must give your workspace view a name, select at least one fact sheet type, and select at least one report and one dashboard to be able to save your new workspace view.

The dropdown menu to select and switch workspace views is in the top ribbon of the SAP LeanIX workspace. See the differences in Figure 2.41 (**Full View**) and Figure 2.42 (**Application only**).

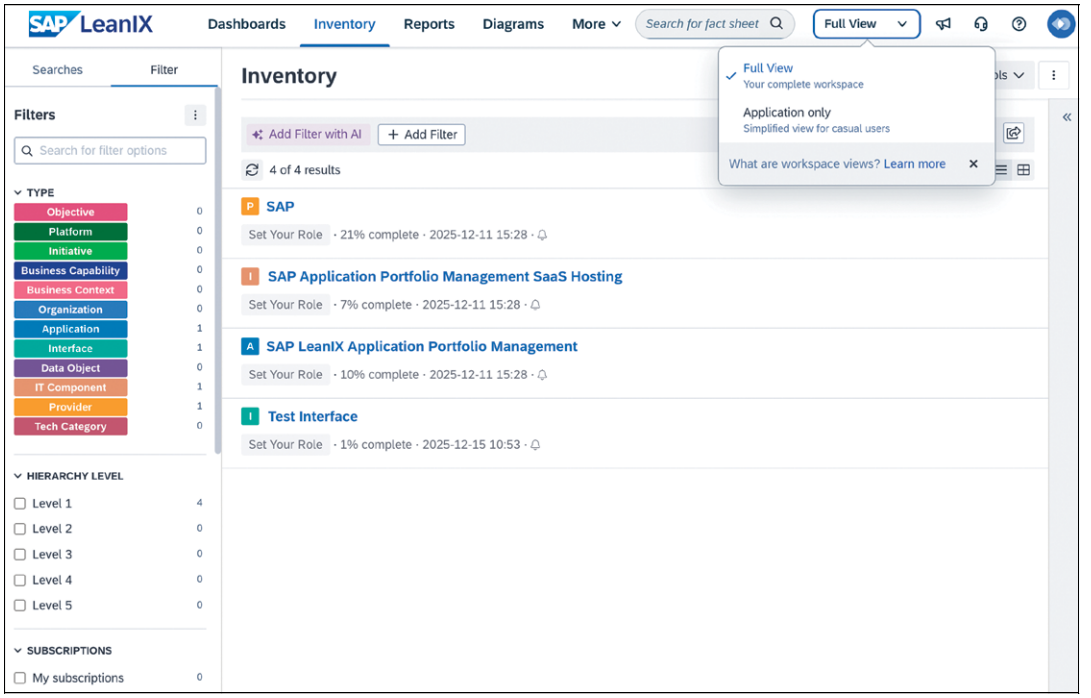


Figure 2.41: Full View Workspace View

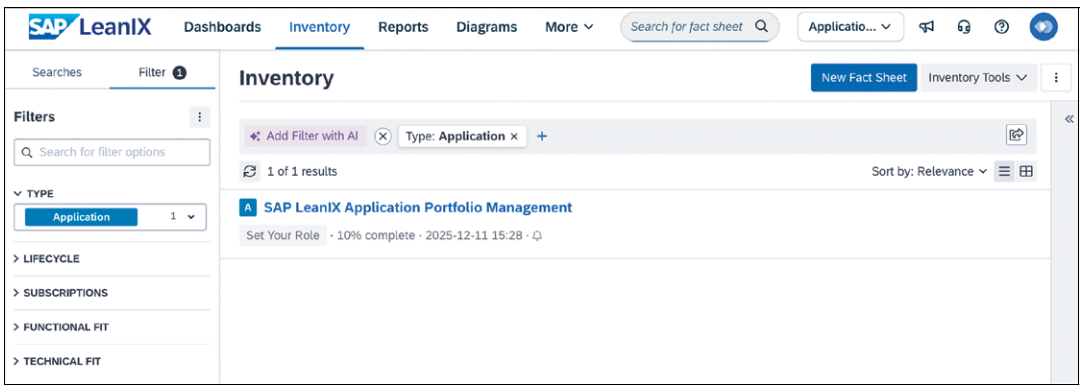


Figure 2.42: Configured Simplified Workspace View

Further Resources

For more information on workspace views, visit the SAP LeanIX user documentation at *http://s-prs.co/v620615*.

Portals, on the other hand, not only reduce the noise of information but also simplify the UI for authenticated users to focus only on a few relevant, preselected data points. Portals are customizable, sharable web views of selected fact sheet types and their data, reducing UI complexity to a minimum for casual SAP LeanIX users that don't need the full feature scope.

Portals can be designed by admins in the **Administration** area under the **ADVANCED SETTINGS** section, menu item **Portals** (see Figure 2.43).

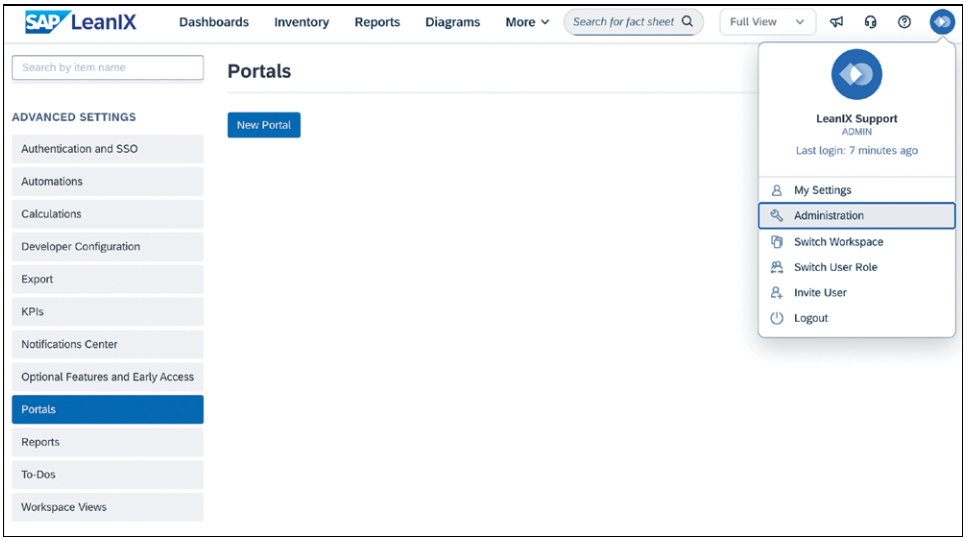


Figure 2.43: Portal Configuration in Administration Area

Portals are very versatile and flexible. Figure 2.44 shows an example of an application portal.

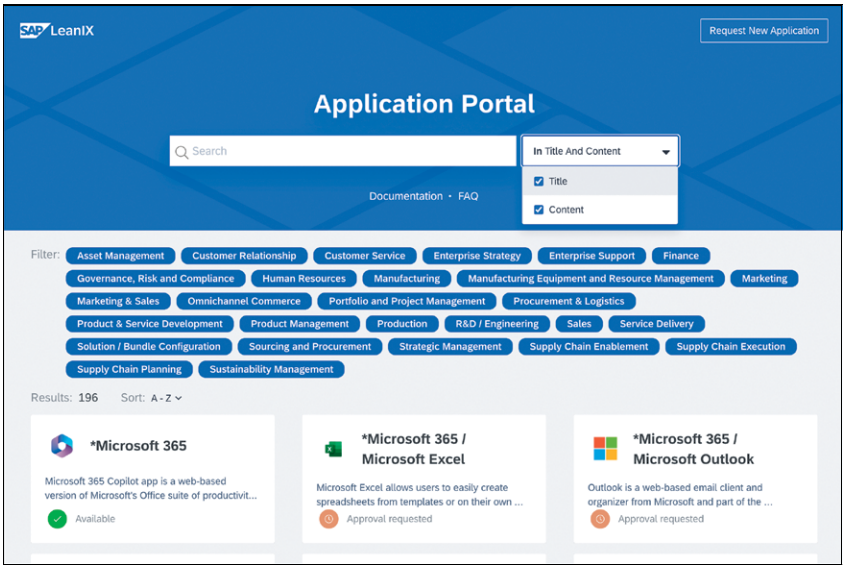


Figure 2.44: Example Application Portal

The following aspects can be configured in the **Administration** area, under the **Portals** configuration:

- General information
- User role accessibility
- Fact sheet type in scope (can only be one)
- Fact sheet filter to only include a subset of the inventory
- Fact sheet name and description input fields
- Icon colors
- Portal design and branding
- Action buttons
- Header and footer links (e.g., to documentation)
- Status field based on existing fact sheet field
- Search and filter options in the portal
- Preselected data for the detailed information tile view
- Wording configuration in the **Localization** tab

After portal creation, you might have to refresh your browser to make the **Portals** menu item appear under the **More** menu in the SAP LeanIX workspace's top ribbon menu (see Figure 2.45).

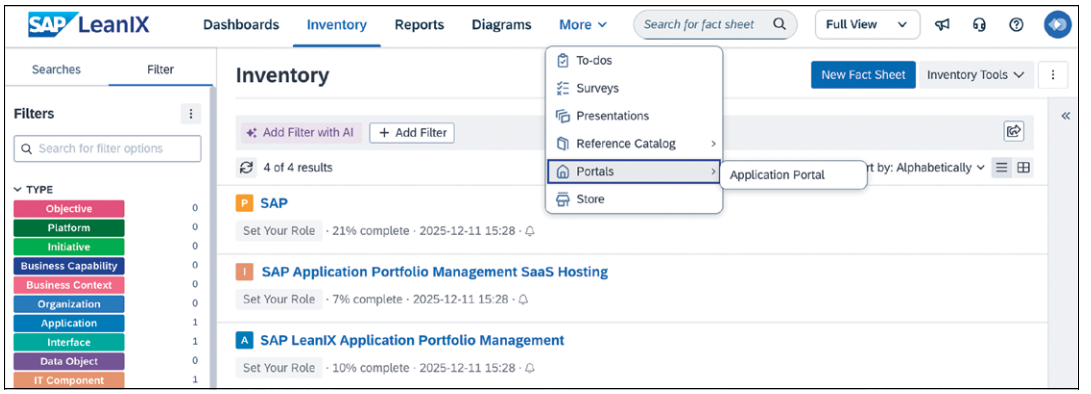


Figure 2.45: Application Portal Example in More Dropdown

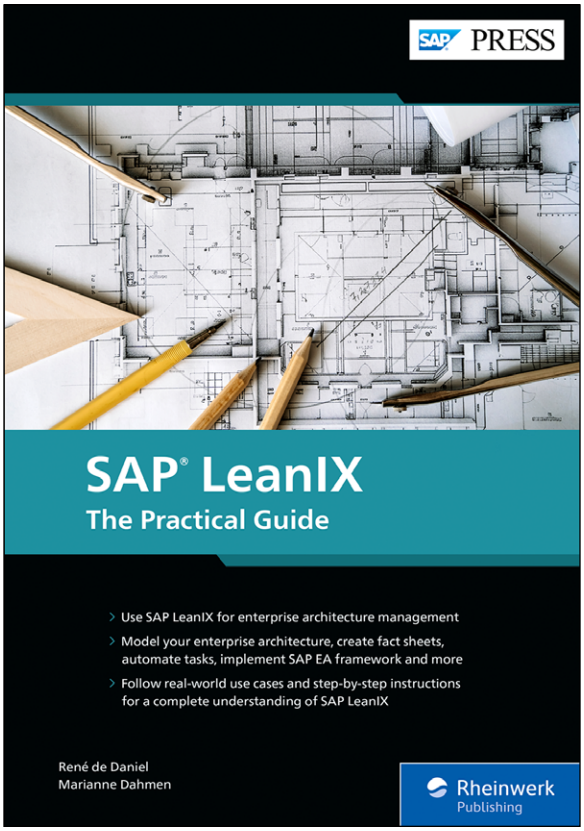
Further Resources

For more information on portals, visit the SAP LeanIX user documentation at *https://help.sap.com/docs/leanix/ea/portals*.

2.4 Summary

In this chapter, you learned about the history of SAP LeanIX and the evolution of its products. You also saw an overview of the various features and capabilities available in the current SAP LeanIX solution range and where in the book you will find related deep dives. The SAP LeanIX out-of-the-box meta model is no longer a black box for you: You have dipped your toes into the basic concepts and modeling recommendations of the core fact sheet types needed for the initial application portfolio assessment use case. Remember that this practical guide is just a starting point to excite your interest in taking an insightful enterprise architecture journey in your organization using SAP LeanIX. Successful enterprise architects see this discipline as a team sport across the various departments and experts. That's why we touched on some of the collaboration features in SAP LeanIX to set you and your colleagues up for success.

Chapter 3 will be particularly relevant for administrators of the SAP LeanIX workspace as we will introduce the initial steps to provision and configure an SAP LeanIX workspace. Jump to Chapter 4 if you want to get an idea of how to load and import data into your workspace, but don't forget that you might have to adapt some naming conventions or wording (called *display names* in the translation model) in the out-of-the-box data model or configure some additional attributes for your organization's taste and use cases of interest (covered in Chapter 3).



René de Daniel, Marianne Dahmen

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