



Overview

The **Perspectium On-demand DataSync** app enables end-to-end provisioning into your AWS account via the AWS ServiceNow Catalog while automatically creating and maintaining your data schemas.

Initial Installation & Configuration

Installing the app

To install On-demand DataSync on your ServiceNow instance, follow these steps:

1. Activate the User Criteria Scoped API plugin

Log into your ServiceNow instance and navigate to **System Definition > Plugins** and search for **com.glideapp.user_criteria.scoped.api (User Criteria Scoped API)** and click **Active/Repair** under **Related Links**. Then, click **Activate**. (If using a Madrid instance, click **Install > Activate > Close & Reload Form**.)

2. Navigate to Retrieved Update Sets

Navigate to **System Update Sets > Retrieved Update Sets** or simply type **Retrieved Update Sets** in the Filter Navigator on the upper left-hand side of the screen.

3. Upload the required update sets

In the resulting form, click **Import Update Set from XML** under the **Related Links** section. Upload the Perspectium for ServiceNow update set (.xml file) provided by [Perspectium Support in the following order](#):

- Perspectium Master Scoped App update set
- AWS Service Catalog Connector update set
- Perspectium Incident Integration update set
- Intelligent Incidents Global Dependencies update set
- Intelligent Incidents update set

4. Preview the update sets

Click the name of each update set you uploaded in **Step #2**. Then, in the upper-right hand corner of the resulting form, click **Preview Update Set** for each update set.

5. Resolve potential errors

After Preview Update Set finishes running for an update set, close out of the pop-up and check if there are any errors or warnings. If errors or warnings have occurred, they will appear in the list at the bottom of the form under the **Update Set Preview Problems** tab. Check the box next to each error or warning and choose whether to **Accept remote update** or **Skip remote update**. To view previously configured fields

and updates that may be affected for each error or warning, click **Show local field** and/or **Show local update**. For more information, see [preview a remote update set](#).

6. Commit the update sets

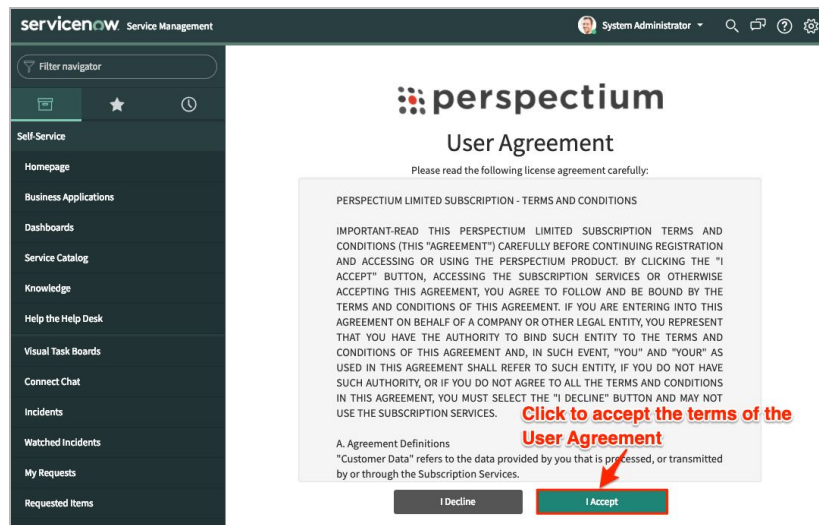
Once any errors or warnings have been addressed, click **Commit Update Set** in the upper right-hand corner of the form for each update set you uploaded in **Step #2**. After Update Set Commit finishes running for an update set, close out of the pop-up.

Setting your initial configurations

To set the initial configurations for your On-demand DataSync app, follow these steps:

1. Read and accept the User Agreement terms

Read through the terms of the Perspectium User Agreement (Navigate to **Perspectium > Control and Configuration > Properties > Sign Agreement** to access the User Agreement page). Then, accept the agreement terms by clicking **I Accept** at the bottom of the form.



2. Register your Perspectium account

Navigate to **Perspectium > Control and Configuration > UI Pages > perspectium_registration > Try It** to access the **Registration & Setup** page. On this page, you will need to register an account with Perspectium. Type your first and last name, email, username, and password in the appropriate fields.

NOTE: The email address you provide will receive notifications about monthly share/subscribe limits.

perspectium
Registration & Setup

Personal Information

Fill out the information below to register your Perspectium account

First Name*

Last Name*

Company Name*

Email Address*
Enter a valid email
 This email will be used for notifications regarding limits. You will be notified when your monthly share/subscribe limit is approaching and when the monthly limit is met

Username*
Use a mix of 2-20 letters, numbers, and underscores

Password*
Enter a valid password
 Use 8+ characters, including at least one uppercase letter, one lower case letter, and one special character. No whitespace is allowed

Confirm Password*

3. Enter your ServiceNow instance login info

Scroll down to the **ServiceNow** section. Type the username and password used to log into your ServiceNow instance. Then, type an encryption key of 24+ characters for Base64 encoding, AES-128 encryption, or TripleDES encryption.

ServiceNow

Enter your ServiceNow instance login information, and create an encryption key for outbound data

Instance Name*

Username*

Password*

Default Encryption Key*

This username and password will be used for instance connection on the agent

Use 24+ characters. This encryption key will be used to encrypt records before they are shared out of your ServiceNow instance. Your default encryption key will be saved in Perspectium properties

Type your ServiceNow login info

Type an encryption key for outbound data

4. Enter your agent OS and database information

Scroll down to the **Agent** section. Then, choose the operating system that your Perspectium agent will run on from the **Operating System** dropdown. Scroll down to the **Database** section. Choose the type of database, database server, port, login information, and name for the local database you will share records to.

5. Set your AWS Service Catalog configurations

Before accessing the AWS Service Catalog in ServiceNow, you will need to follow the steps for **AWS Prerequisites** under **Getting Started** at [How to install and configure the AWS Service Catalog Connector for ServiceNow](#).

NOTE: Do not follow steps other than those noted in the **AWS Prerequisites** section at the link above.

6. Assign AWS Service Catalog roles to users

Navigate to **Perspectium > Control and Configuration > UI Pages > perspectium_aws_configuration_form > Try It** to access the **AWS Configuration** page. On the **AWS Configuration** page, choose users from the lists on the left (**Available Users**) to assign AWS Service Catalog roles to.

The screenshot displays the ServiceNow interface for the 'perspectium AWS Configuration' page. The page title is 'perspectium AWS Configuration' with a subtitle 'Fill out the form below to finish setting up your AWS Service Catalog'. The main content area is titled 'Roles' and contains three sections for assigning roles to users:

- Assign the AWS SC Account Admin role to the selected users below***: This section has an 'Available Users' list containing Abel Tuter [abel.tuter], Abraham Lincoln [abraham.lincoln], Adela Cervantsz [adela.cervantsz], System Administrator [admin], and Aileen Mottern [aileen.mottern]. A red box highlights this list, and a red arrow points to the right arrow button. A red text label 'Select users to assign AWS roles to' is positioned above the arrow. To the right is an empty 'Selected Users' box.
- Assign the AWS SC Portfolio Manager role to the selected users below***: This section has an identical 'Available Users' list and an empty 'Selected Users' box.
- Allow the selected users below to order AWS Service Catalog***: This section has an identical 'Available Users' list and an empty 'Selected Users' box.

Each section includes a 'Selected Users' box with up and down arrow buttons. The left sidebar shows the ServiceNow navigation menu with 'Service Catalog' selected.

7. Enter your AWS Region and Access Keys

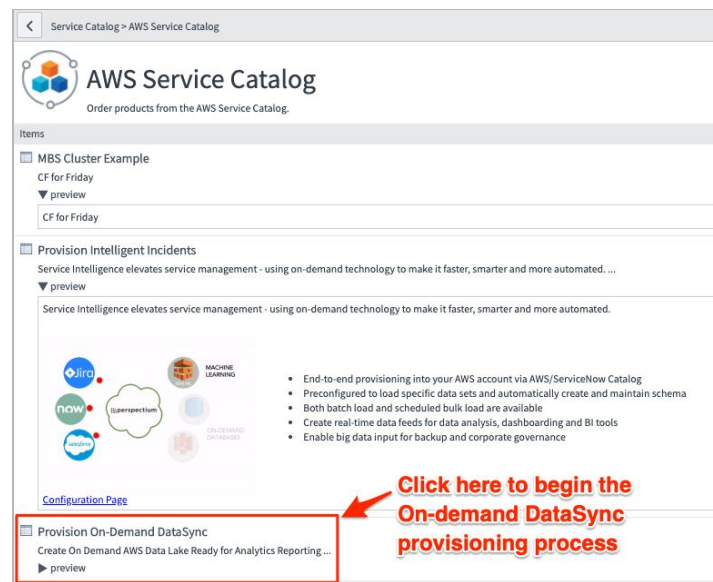
Scroll down to the **AWS** section. From the **Region** dropdown, select the [region associated with your AWS account](#). Then, type the **Access Key** and **Secret Access Key** associated with your AWS account. These keys can be [found in the Identity and Access Management \(IAM\) section](#) of your AWS account. Finally, click **Submit** at the bottom of the form.

Provisioning On-demand DataSync

To sync your ServiceNow data with your AWS Relational Database Service (RDS) instance, follow these steps:

1. Navigate to On-demand DataSync

After following the steps for initial installation & configuration of the On-demand DataSync app, you will be redirected to ServiceNow's AWS Service Catalog connector page. On this page, click **Provision On-Demand DataSync**.



2. Choose a table

Click the magnifying glass next to the **Table** field. Then, choose a table whose data you want to share to your AWS RDS instance.

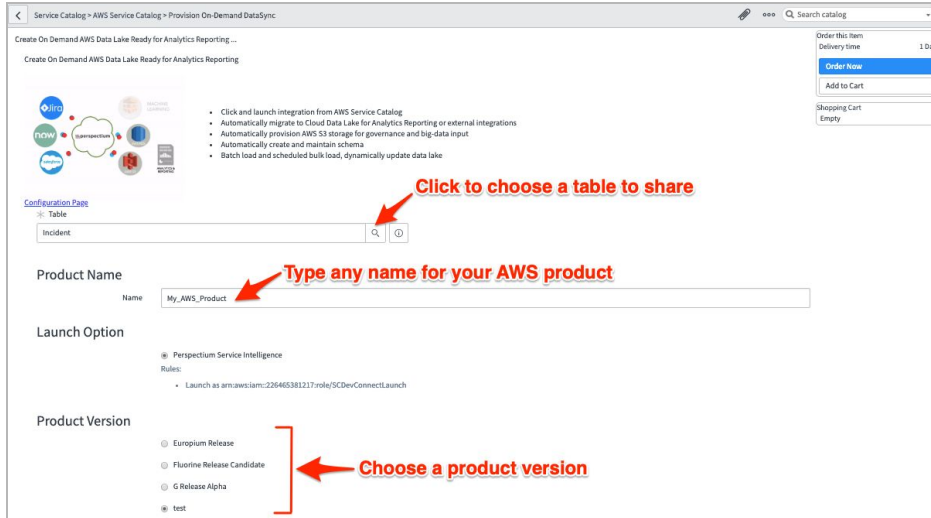
3. Enter a product name

In the **Name** field, type a unique name for your On-demand DataSync product. Do not enter a previously used name for another On-demand DataSync product.

4. Choose a product version

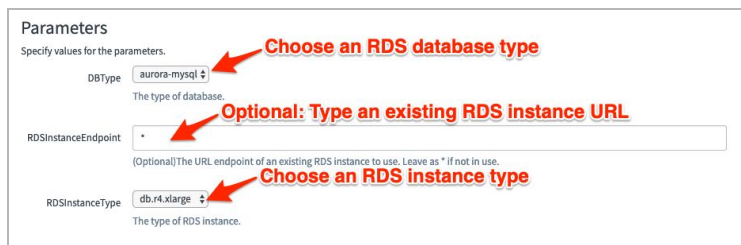
In the **Product Version** section, choose a version option that you want to configure your cloud formation on.

NOTE: "Fluorine Test" is the only option that will work for the beta version of this app.



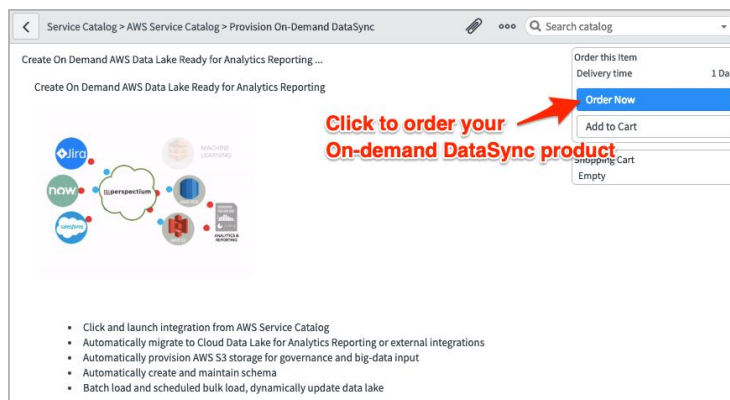
5. Choose your parameters

Select an RDS database type to provision on AWS from the **DBType** dropdown. For more information about RDS database types, see [Amazon Relational Database Service](#). If you would like to share your data to an existing RDS instance, type the URL of the instance in the **RDSInstanceEndpoint** field. Finally, choose an RDS instance type from the **RDSInstanceType** dropdown.



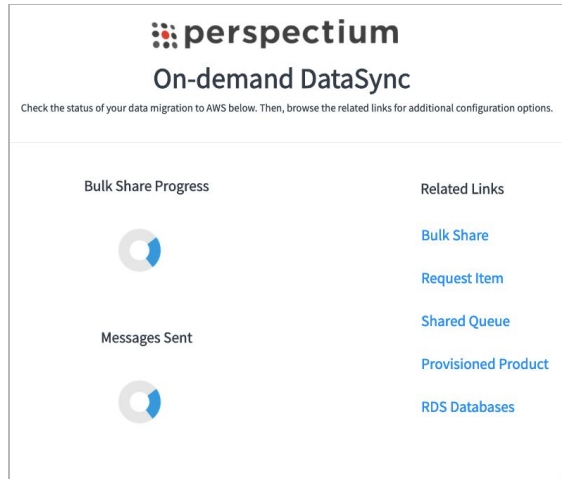
6. Order On-demand DataSync

Scroll up, and click **Order Now** in the top right-hand corner of the form.



7. Confirm sharing of your ServiceNow data to AWS

The status of data sharing to AWS will be displayed on the following page. After the status shows as **100%**, you can browse the **Related Links** to view information about the data you have shared to AWS.



8. Share your data to a local database or analytics tool (optional)

To run analysis and reporting on the data you have synced with AWS, you can also add your AWS RDS database as a [connection to your MySQL client](#) or connect your RDS database as a [data source in Tableau](#).