



DataSync Free
App Installation & Configuration Guide

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Overview

The Perspectium DataSync Free application allows your ServiceNow instance to interact with the Perspectium Integration Mesh for seamless data integration with a data store. The DataSync Free application utilizes scheduled jobs and script includes to send messages to the Integration Mesh for a Cloud Database (MariaDB) supported by Perspectium.



Setting Initial Configurations for DataSync Free

ServiceNow Dependencies

The DataSync Free app requires a **global Perspectium script include** to function properly. To install the global script include, an integration user is needed.

The integration user will have the **x_perr2_datasyncfr.perspectium** role and **script_include_admin** role. During DataSync Free Setup, the user has the option to create an integration user or use the login credentials of an existing ServiceNow user to install the global Perspectium script include. The existing user must **not** have the admin role and must be updated to have the previously mentioned required roles.

An informational page will appear during registration with details of the integration user and the global script include's functions. The global Perspectium script include will be installed on your instance using the integration user during DataSync Free Setup.

Upgrading the DataSync Free app will not create a new integration user or install the script include again if they are already found on your instance. The script include will be updated as necessary to ensure that it has the latest version.

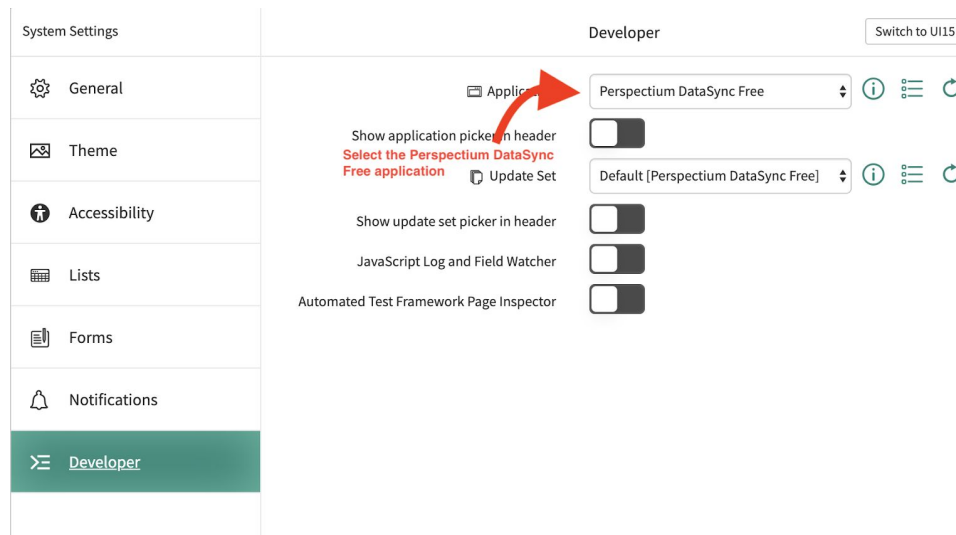
DataSync Free Registration

To set the initial configurations for your DataSync Free app, follow these steps:

1. Switch to the Perspectium DataSync Free Application Scope

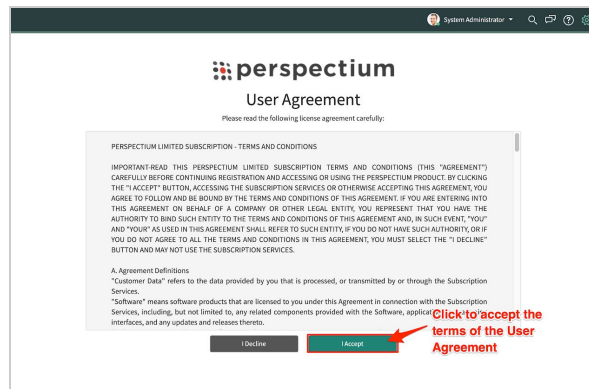
The DataSync Free app requires your ServiceNow instance to be in its scope during registration. Navigate to the **gear icon** on the top-left corner of your instance. On the Developer tab, select **Perspectium DataSync Free** as the **Application**.

Note: This action is only required for users with the **admin role** since admin users have the ability to choose different application scopes (non-admin users will automatically be in the DataSync Free scope).



2. Read and accept the User Agreement terms

Navigate to **Perspectium DataSync Free > Control and Configuration > Setup** to access the User Agreement page. Then, read through and accept the agreement terms by clicking **I Accept** at the bottom of the form.



3. Read and accept the ServiceNow Dependencies

After accepting the User Agreement terms, read through the dependencies the Perspectium DataSync Free application needs to function properly. Accept the dependencies by clicking **I Accept** at the bottom of the form.



ServiceNow Dependencies

The Perspectium DataSync Application requires a global Perspectium script include to function properly. To install the global script include, an integration user is needed.

During DataSync registration, you have the option to create an integration user or use the login credentials of an existing user to install the global Perspectium script include. The integration user will have the Perspectium role and script_include_admin role. The existing user will be updated to have these required roles. The existing user must **not** have the admin role.

The PerspectiumGlobal script include contains the following functions:

- GlideEncrypter functions for encrypting data
- User session functions used for domain separation
- Functions to access records of global tables
- Access to global script include functions used for scheduling the sharing of records

The integration user and the global Perspectium script include will automatically be installed onto your instance once DataSync registration is complete.

Learn more about [ServiceNow dependencies](#).

By clicking "I Accept", you agree to the installation of the PerspectiumGlobal script include using the integration user on your ServiceNow instance.

4. Create an Integration User

After accepting the ServiceNow Dependencies, you will need to have an integration user to install the global Perspectium script include. Choose to enter an existing user's login credentials or create an integration user from the **Integration User** dropdown. Follow the instructions to update your existing user or to create a new user.

Note: If your current permissions does not allow you to create a new user, the integration user must be made by a user that does have write access to the Users table.



Create an Integration User

Before registering with Perspectium DataSync, an integration user is needed to install the global Perspectium script include. Complete the instructions below to use an existing user or create an integration user.

Integration User

Enter an existing user's login credentials. This user must have the `x_perr2_datasyncfr.perspectium` role and `script_include_admin` role. The existing user must **not** have the admin role

5. Verify Integration User

After updating or creating a valid integration user, enter their username and password in the appropriate fields. Then, click **Next** to install the global Perspectium script include and continue to the DataSync Free Registration & Setup page.

Instance Name*	<input type="text" value="dev96102"/>
Username*	<input type="text" value="perspectium.user"/>
Password*	<input type="password" value="*****"/>
	<input type="checkbox"/> Show Password

Click *Next* to install the global Perspectium script include and continue to the DataSync registration.

<input type="button" value="Back"/>	<input type="button" value="Next"/>
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6. Register your Perspectium account

On the DataSync Free Registration & Setup page, type your first and last name, company name, and email in the appropriate fields. Then, create a password. Your password must be 8+ characters, including at least one uppercase letter, one lowercase letter, and one special character with no whitespace.

Note: This password will be used to connect to both the Perspectium Integration Mesh and the Perspectium Cloud database.



DataSync Free Registration & Setup

Account Information

Fill out the information below to register your Perspectium account

First Name*	<input type="text" value="My"/>
Last Name*	<input type="text" value="Name"/>
Company Name*	<input type="text" value="My Company"/>
Email Address*	<input type="text" value="myemailaddress@example.com"/>
	<small>This email will be used for notifications regarding limits. You will be notified when your monthly share limit is approaching and when the monthly limit is met</small>
Password*	<input type="password" value="*****"/>
	<input type="checkbox"/> Show Password
	<small>Create a password to connect to both the Perspectium Integration Mesh and the Perspectium database. The password must contain the following:</small>
	<ul style="list-style-type: none">✓ At least 8 characters✓ At least one uppercase letter✓ At least one lower case letter✓ At least one special character✓ No whitespaces
Confirm Password*	<input type="password" value="*****"/>
	<input type="checkbox"/> Show Password

7. Create an encryption key

Type an encryption key of 24+ characters for Base64 encoding, AES-128 encryption, or TripleDES data encryption in the **ServiceNow** section. Finally accept the terms for submitting the form and click **Finish Setup** at the bottom of the form.

ServiceNow

Create an encryption key to enable outbound data sharing

Instance Name*

Encryption Key*

Show Encryption Key

Create an encryption key that will be used to encrypt records before they are shared out of your ServiceNow instance. This will be saved in your Perspective DataSync Free properties

✓ At least 24 characters

Information provided above by the user will be shared with Perspective and used to connect to the Perspective Integration Mesh.

I consent to share my information with Perspective

Finish Setup



8. Receive information to connect to your database

You will be provided access via email to connect to the Perspective Cloud database after successful DataSync Free registration.

9. View your data on a database viewer

Access and view the Perspective Cloud database by clicking on the url provided in the email or use a database viewer of your choice. You can then connect to this database to view data and run your own reports using your reporting tools. You must use the password you created during DataSync Free registration to connect to both the Perspective Integration Mesh and the Perspective Cloud database.

You're now ready to start syncing data from ServiceNow to the Perspective Cloud database with DataSync Free!

To learn how to share data from your ServiceNow instance, see the sections on [creating a bulk share](#), and [scheduled bulk share](#).

Creating bulk shares

Creating a bulk share

Bulk shares allow for one-time sharing of ServiceNow records to a Perspectium Cloud database. Bulk shares can contain conditions and can also be configured to contain a group of scheduled bulk shares to be run in an order that you can specify.

Note:

- DataSync Free allows sharing only from the **Incident(incident)** table.
- The user is limited to have the maximum of one bulk share record.

A bulk share record is already created when the user registers for the first time. To edit, follow these steps:

1. Navigate to **Perspectium DataSync Free > DataSync Free > Bulk Share**.
2. Notice that a bulk share record has already been created.
3. In the **Name** field, type any name for your bulk share.
4. Scroll down to the **Additional Settings** tab. Then, choose an encryption method to encrypt the data that will be shared out from the **Encryption Method** dropdown. Encryption method options include:

Encryption Method	Bulk shared data will...
TripleDES	be encrypted with Triple DES.
AES128	be encrypted with AES-128.
Base64 Encode Only	have Base64 encoding only.
Unencrypted	not be encrypted.

5. Click the **Save** or **Execute Now** button at the bottom of the form to finish creating your bulk share. Once executed, the form will become read only.

NOTE: The above procedure describes only the mandatory steps for setting up a bulk share. For additional bulk share configuration options, see [ServiceNow bulk shares](#).

Creating a scheduled bulk share

Scheduled bulk shares allow for the scheduling bulk share to occur daily, weekly, monthly, once at a specified time, periodically at specified times (custom), or on demand (immediately). After creating a bulk share, you can then add that bulk share as a child record to be run under the schedule specified within your scheduled bulk share.

To create a scheduled bulk share, follow these steps:

1. Navigate to **Perspectium DataSync Free > DataSync Free > Scheduled Bulk Share**.
2. At the top of the form next to Scheduled Bulk Shares, click the **New** button.
3. In the **Name** field, type any name for your bulk share.
4. From the **Run** dropdown, choose when you want your scheduled bulk share to run. Run options include:

Option	Scheduled bulk share will run...
Daily	Every day at a specified time of day
Weekly	Every week at a specified day and time of

	day
Monthly	Every month at a specified day and time of day
Periodically	At a custom interval (e.g., every 5 days) at a specified time of day
Once	Once at a specified date and time
On Demand	Immediately

If selecting a Run option where a time interval should be specified, type the hours, minutes, and seconds in each respective textbox next to the **Time** field.

- At the bottom left-hand corner of the form, click the **Submit** button to save the configurations for your scheduled bulk share.

The screenshot shows a form titled 'Scheduled Bulk Share' with a 'New record' header. The form contains the following elements:

- Name:** A text input field containing 'test_scheduled_bulk_share'. A red arrow points to it with the text 'Type any name'.
- Active:** A checked checkbox.
- Enable repeating jobs:** A checked checkbox.
- Run:** A dropdown menu set to 'Weekly'.
- Day:** A dropdown menu set to 'Wednesday'.
- Time:** Three input fields for 'Hours' (10), 'minutes' (15), and 'seconds' (00).
- Conditional:** An unchecked checkbox.
- Submit:** A green button at the bottom left. A red arrow points to it with the text 'Click to save your scheduled bulk share'.

Red annotations also include a box around the Run, Day, and Time fields with the text 'Select/configure your Run options' and an arrow pointing to the Run dropdown.

- From the resulting list of scheduled bulk shares, click back into the scheduled bulk share that you created in **Step #5**.
- Locate the **Bulk Shares** list at the bottom of the form. Here you can either click **New** and then follow the steps to [create a bulk share](#) or click **Edit...** and add a previously created bulk share to run under the schedule that you have created.

After creating a bulk share and/or scheduled bulk share, data from your ServiceNow instance should start automatically syncing with your Perspectium Cloud database.

Resources

Data Obfuscation

Data Obfuscation is a Perspectium function that allows users to specify obfuscation rules for data sharing using bulk shares as per [General Data Protection Regulation \(GDPR\)](#). Data Obfuscation is available in the **Advanced** tab and then the **Enable data obfuscation** checkbox on a bulk share. A related list of obfuscation rules will appear at the bottom of a bulk share form after it is saved or updated.

Types of Obfuscation Rules

There are several different types of obfuscation rules that users can apply to their bulk share.

The **Field** obfuscation rule allows a user to choose a field to obfuscate in their outbound message. This field will be replaced by an equal number of masking characters.

The **Pattern** obfuscation rule allows a user to specify a JavaScript regular expression to search for and replace in their outbound message.

The **Replacement** obfuscation rule allows a user to specify search values which will be replaced by a masking value. To create a Replacement obfuscation rule, insert a new obfuscation rule with Type as "Replacement" and submit the form. A related list of search value records will appear at the bottom of the form. Each search value will be replaced with the masking value if found in an outbound message.

Data Obfuscation Dashboard

The **Data Obfuscation Dashboard** module displays information about a user's data obfuscation rules. A user can view information about each bulk share with active data obfuscation rules. The dashboard also shows the total number of records obfuscated from each table as well as the total number of obfuscation rules on each table.

Domain Separation

The Perspectium DataSync Free Application supports Level 1 - Tenant Data Management domain separation. Records are shared based on configurations the user makes on their bulk shares.

Note: For domain separated ServiceNow instances, you must be in the **global** domain to complete DataSync Free registration.

Bulk shares

Users can configure their bulk shares to run as a specific system user. Bulk shares that do not specify a system user will automatically run as the default system user in the global domain. If a system user has been chosen, the bulk share can have only certain records sent and omit records from being shared that they don't have access to. This can be configured when the user creates a new bulk share under the Security tab.

Optional share configurations

After creating the bulk shares on your sharing ServiceNow instance, you may choose to configure a number of optional settings for your shares. For more information on optional configurations for Perspectium bulk shares, see [ServiceNow bulk shares](#), [ServiceNow messages](#), and [other topics](#).

Additional Support

For additional support with DataSync Free, you can post an inquiry on [Perspectium's Community Forum](#) or [contact the Perspectium Support team](#).