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DataSync Express  
App Installation & Configuration Guide

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# Overview

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



# Set Up Initial Configurations for DataSync Express

## ServiceNow Dependencies

The DataSync Express 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\_datasync.perspectium** role and **script\_include\_admin** role. During DataSync Express 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 Express Setup.

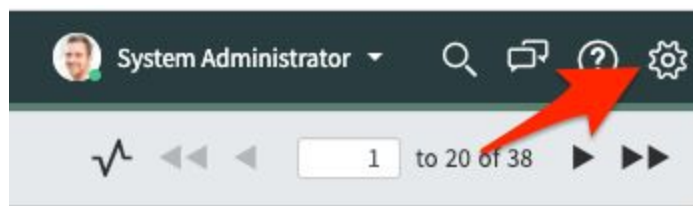
**Note:** Upgrading the DataSync Express app will not create a new integration user or install the script include again if they are already found on your instance. The script include will be updated as necessary to ensure that it has the latest version.

## DataSync Express Initial Setup

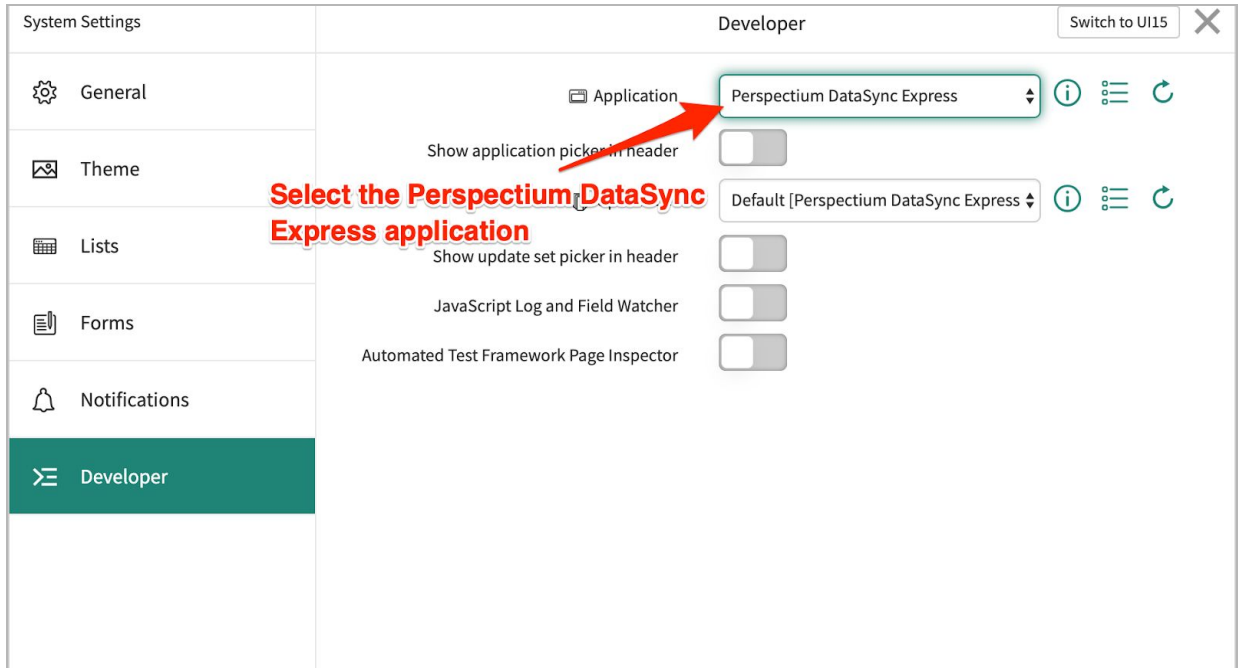
To set up the initial configurations after [installing](#) the DataSync Express app into your instance, follow these steps:

### 1. Switch to the Perspectium DataSync Express Application Scope

The DataSync Express app requires your ServiceNow instance to be in its scope during initial setup. First click on the **gear icon** on the top-right corner of your instance:

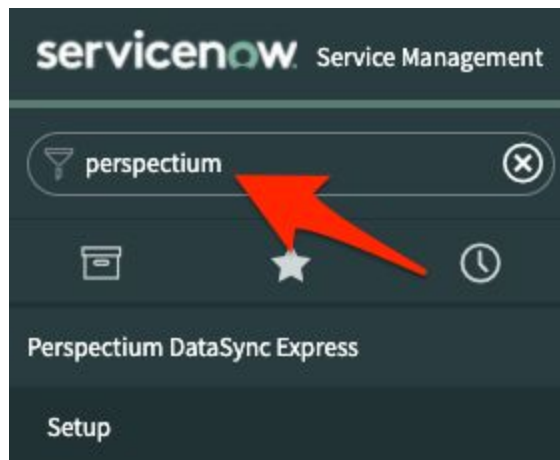


On the Developer tab, select **Perspectium DataSync Express** as the **Application**.  
**Note:** This action is **only required** for users with the **admin role** since admin users have the ability to choose different application scopes (non-admin users will automatically be in the DataSync Express scope).



## 2. Navigate to the Perspectium DataSync Express application

In the Filter Navigator of the [Application Navigator](#), type in “perspectium” to find the Perspectium DataSync Express application:



## 3. Read and accept the User Agreement terms

Navigate to **Perspectium DataSync Express > 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.

servicenow Service Management

System Administrator

perspectium

Perspectium DataSync Express

Setup

## perspectium User Agreement

Please read the following license agreement carefully:

PERSPECTIUM LIMITED SUBSCRIPTION - TERMS AND CONDITIONS

IMPORTANT-READ THIS PERSPECTIUM LIMITED SUBSCRIPTION TERMS AND CONDITIONS (THIS "AGREEMENT") CAREFULLY BEFORE CONTINUING REGISTRATION AND ACCESSING OR USING THE PERSPECTIUM PRODUCT. BY CLICKING THE "I ACCEPT" BUTTON, ACCESSING THE SUBSCRIPTION SERVICES OR OTHERWISE ACCEPTING THIS AGREEMENT, YOU AGREE TO FOLLOW AND BE BOUND BY THE TERMS AND CONDITIONS OF THIS AGREEMENT. IF YOU ARE ENTERING INTO THIS AGREEMENT ON BEHALF OF A COMPANY OR OTHER LEGAL ENTITY, YOU REPRESENT THAT YOU HAVE THE AUTHORITY TO BIND SUCH ENTITY TO THE TERMS AND CONDITIONS OF THIS AGREEMENT AND, IN SUCH EVENT, "YOU" AND "YOUR" AS USED IN THIS AGREEMENT SHALL REFER TO SUCH ENTITY, IF YOU DO NOT HAVE SUCH AUTHORITY, OR IF YOU DO NOT AGREE TO ALL THE TERMS AND CONDITIONS IN THIS AGREEMENT, YOU MUST SELECT THE "I DECLINE" BUTTON AND MAY NOT USE THE SUBSCRIPTION SERVICES.

A. Agreement Definitions

"Customer Data" refers to the data provided by you that is processed, or transmitted by or through the Subscription Services.

"Software" means software products that are licensed to you under this Agreement in connection with the Subscription Services, including, but not limited to, any related components provided with the Software, application interfaces, and any updates and releases thereto.

I Decline I Accept

Click to accept the terms of the User Agreement

#### 4. Read and accept the ServiceNow Dependencies

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

## perspectium ServiceNow Dependencies

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

During DataSync Express Setup, 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 need to have the `x_perr2_datasync.perspectium` role and `script_include_admin` role. The existing user must **not** have the admin role and must be updated to have these required roles.

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 global Perspectium script include will automatically be installed onto your instance during DataSync Express Setup.

Learn more about [ServiceNow dependencies](#).

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

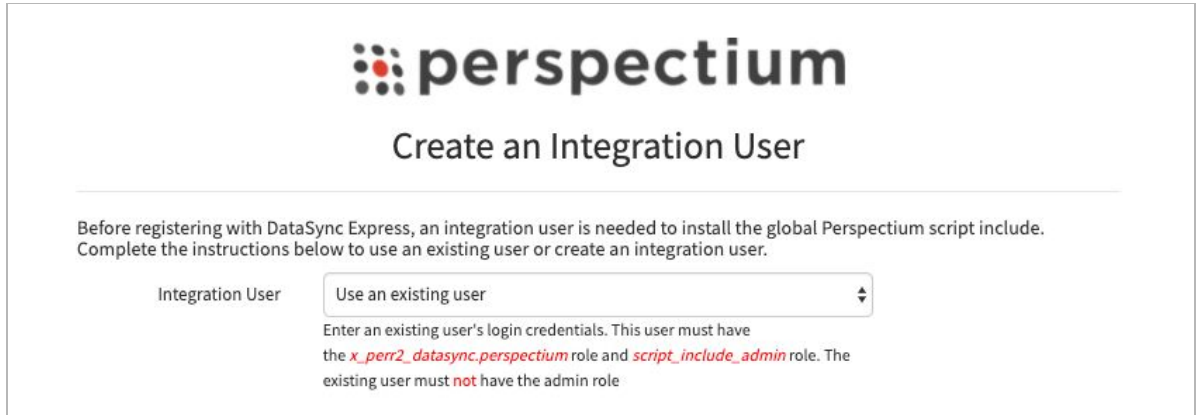
Back I Accept

Click to accept installing the ServiceNow dependencies

## 5. 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.

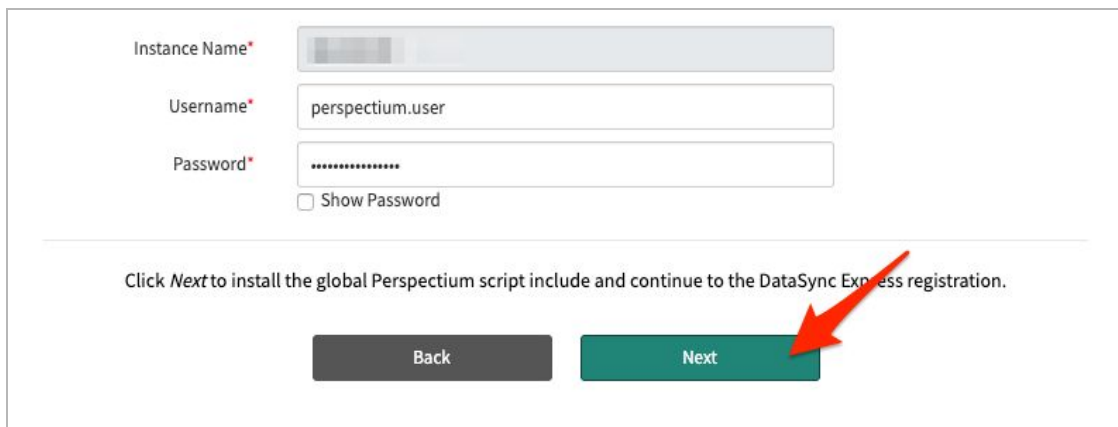
Note: If your current permissions does not allow you to create a new user, the integration user must be made by a user that does have write access to the **Users (sys\_user)** table.



The screenshot shows the Perspectium logo at the top, followed by the heading "Create an Integration User". Below this is a horizontal line and a paragraph of instructions: "Before registering with DataSync Express, 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." Underneath, there is a label "Integration User" and a dropdown menu currently set to "Use an existing user". Below the dropdown is a note: "Enter an existing user's login credentials. This user must have the *x\_perr2\_datasync.perspectium* role and *script\_include\_admin* role. The existing user must **not** have the admin role".

## 6. 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 Express Registration & Setup page.




The screenshot shows a registration form with three input fields: "Instance Name\*" (with a blurred value), "Username\*" (containing "perspectium.user"), and "Password\*" (with masked characters). Below the password field is a checkbox labeled "Show Password" which is unchecked. At the bottom of the form, there is a line of text: "Click **Next** to install the global Perspectium script include and continue to the DataSync Express registration." Below this text are two buttons: a grey "Back" button and a green "Next" button. A red arrow points to the "Next" button.

## 7. Register your Perspectium account

On the DataSync Express 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 Express Registration & Setup

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### Account Information

Fill out the information below to register your Perspectium account

First Name\*

Last Name\*

Company Name\*

Email Address\*

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

Password\*

Show Password

Create a password to connect to the Perspectium Integration Mesh. The password must contain the following:

- ✓ At least 8 characters
- ✓ At least one uppercase letter
- ✓ At least one lower case letter
- ✓ At least one special character
- ✓ No whitespaces

Confirm Password\*

Show Password

✓ Passwords match

## 8. 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 to submit your information to the Perspectium Integration Mesh and setup account.



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 Express properties

✓ At least 24 characters

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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



## 9. Receive information to connect to your database

The setup will take a few minutes and you will be emailed with your database URL after successful registration. While the setup is taking place, you can start using the DataSync Express app to start sharing data from your ServiceNow instance. To learn how to share data from your ServiceNow instance, see the sections on [creating a bulk share](#), and [scheduled bulk share](#).

## 10. 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 or reporting tool (such as Tableau) of your choice. You can then connect to this database to view data and run your own reports using your reporting tools.

**Note:** You must use the password you created during DataSync Free registration to connect to both the Perspective Integration Mesh and the Perspective Cloud database.

# 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 Express allows sharing only from the **Task (task)** table and their child tables.

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 Express > DataSync Express > Bulk Share**.
1. Notice that a bulk share record has already been created.
2. In the **Name** field, type any name for your bulk share.
3. Click the dropdown next to **Table name**. Then, search for and choose the table whose data you want to bulk share out of your ServiceNow instance.
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 of one or more bulk shares 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 Express > DataSync Express > 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

**Note:** 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 the 'Scheduled Bulk Share' form. The 'Name' field contains 'test\_scheduled\_bulk\_share'. The 'Active' and 'Enable repeating jobs' checkboxes are checked. The 'Run' dropdown is set to 'Weekly', 'Day' is 'Wednesday', and 'Time' is set to 10:15:00. The 'Submit' button is highlighted with a red arrow and the text 'Click to save your scheduled bulk share'. The 'Run' options section is also highlighted with a red arrow and the text 'Select/configure your Run options'. The text 'Type any name' is placed above the Name field.

- 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 Perspective Cloud database.

# Resources

## Domain Separation

The Perspectium DataSync Express 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 Express 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 Express, you can post an inquiry on [Perspectium's Community Forum](#) or [contact the Perspectium Support team](#).