



Perspectium Spoke

App Installation & User Guide

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Overview

The Perspectium Spoke application allows users to share records out of their ServiceNow instance to the Perspectium Integration Mesh in order to integrate with other Perspectium-supported applications.

Application Dependencies

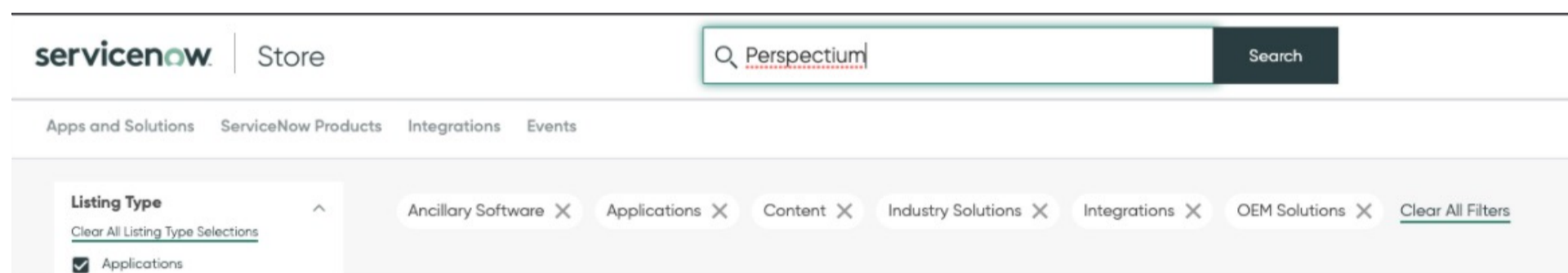
The Perspectium Spoke requires the Starter package of [IntegrationHub](#). The spoke uses the [REST step](#) functionality of IntegrationHub to share messages out of the instance.

Setting Up Initial Configurations

Perspectium Spoke Initial Setup

To install and set up the Perspectium Spoke app into your instance, follow these steps:

- 1 Install the [IntegrationHub](#) Starter package on your instance.
- 2 [Download](#) the **Perspectium Spoke** app from the **ServiceNow Store**. Go to <https://store.servicenow.com> and search for **Perspectium**.

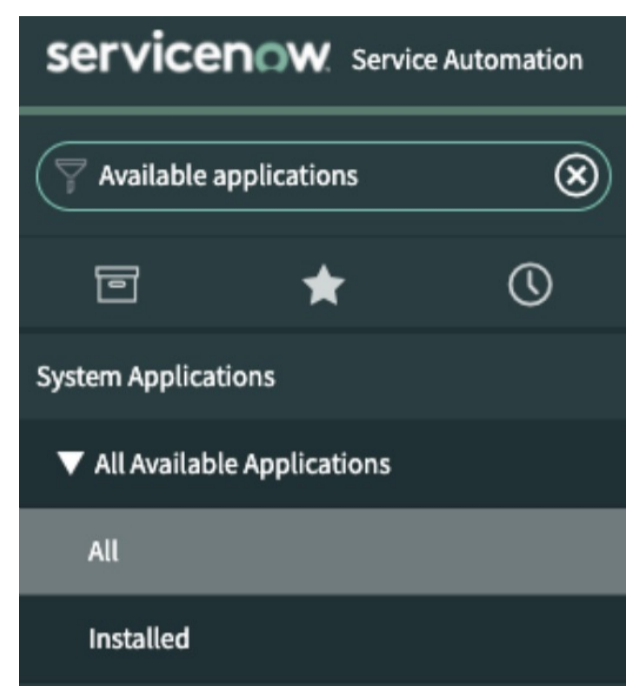


Click on the **Perspectium Spoke** app and choose **Buy**. You will then be prompted to log in with your HI credentials and purchase a license and entitlement to the app.

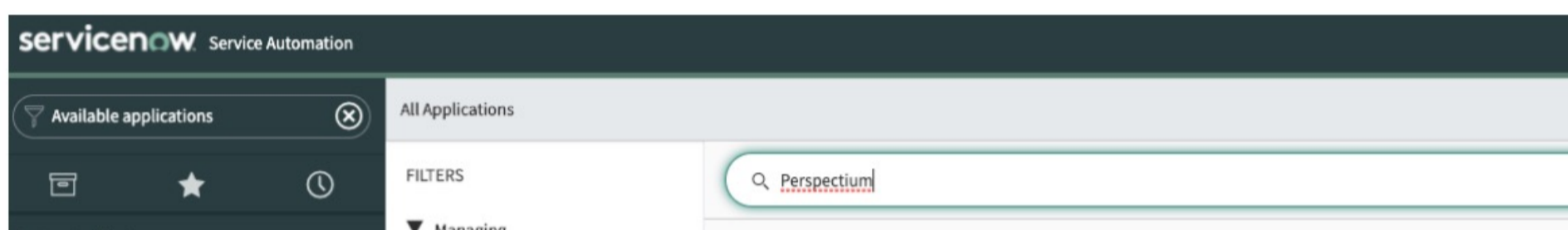
Perspectium Spoke Initial Setup (continued)

- 3 Go to your ServiceNow instance to start the installation.

Shortly after the app has been entitled for your instance, go to your instance and then in the Filter Navigator of the [Application Navigator](#), type in **Available applications** to navigate to System Applications > All Available Applications > All.



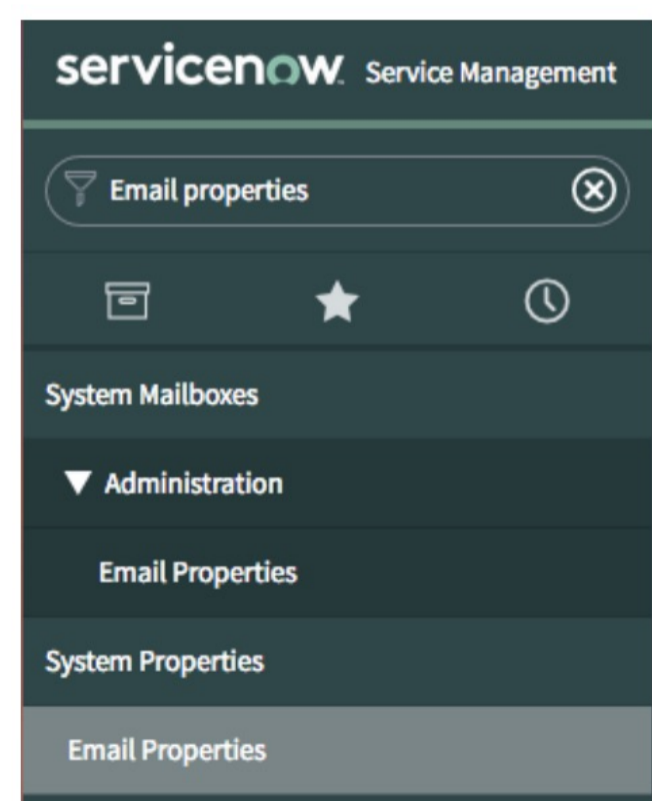
- 4 Install the Perspectium Spoke into your ServiceNow instance. Search for the application by typing in **Perspectium** in the search bar.



The Perspectium Spoke app should appear in the list with an **Install** button to the right. Click on the button and wait for it to finish installing.

- 5 Navigate to Email Properties to allow outbound emails.

Ensure you are in the Global application scope. In the Filter Navigator, type in **Email properties** to navigate to System Properties > Email Properties. Under Outbound Email Configuration, check the box for Email sending enabled. This will allow email notifications in the case sharing a record fails.



Perspectium Spoke Initial Setup (continued)

- 6 Allow outbound emails.**
Under Outbound Email Configuration, select the checkbox for Email sending enabled and click Save.

Email Properties Save

Email accounts can be created or modified in the Email Accounts table.
Email account connection status and diagnostics information can be found on the Email Diagnostics page.

Outbound Email Configuration

Email sending enabled ⓘ
 Yes | No

Inbound Email Configuration

Email receiving enabled ⓘ
 Yes | No

- 7 Navigate to [Flow Designer](#).**
The Share Records flow in the list of Flows and is ready to be customized.

User Guide

Share out Records from Instance

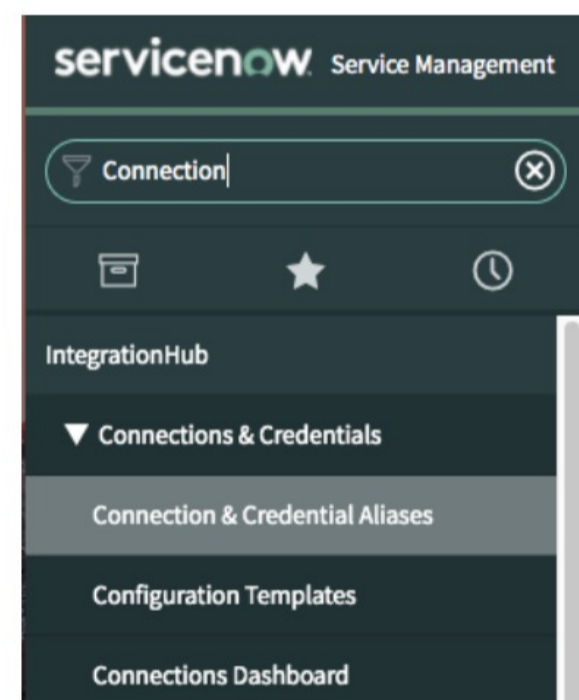
The Perspective Spoke uses Flow Designer to allow users to share records out of their ServiceNow instance with minimal configuration. The spoke is available when the user creates a new flow and users have the ability to choose the table they want to share records from. Using the action in the spoke, the Perspective Spoke will set up the XML of the record and set it out via REST post request.

To start using the Perspective Spoke, follow these steps:

Create Connection

Note: The [connection_admin role](#) is required for the user to set up a [Connection](#) in ServiceNow. Ensure the user has at least the [connection_admin](#) role before proceeding. You will need credential information as provided by [Perspective Support](#).

- 1 Navigate to the [Connection & Credential Aliases](#) List.



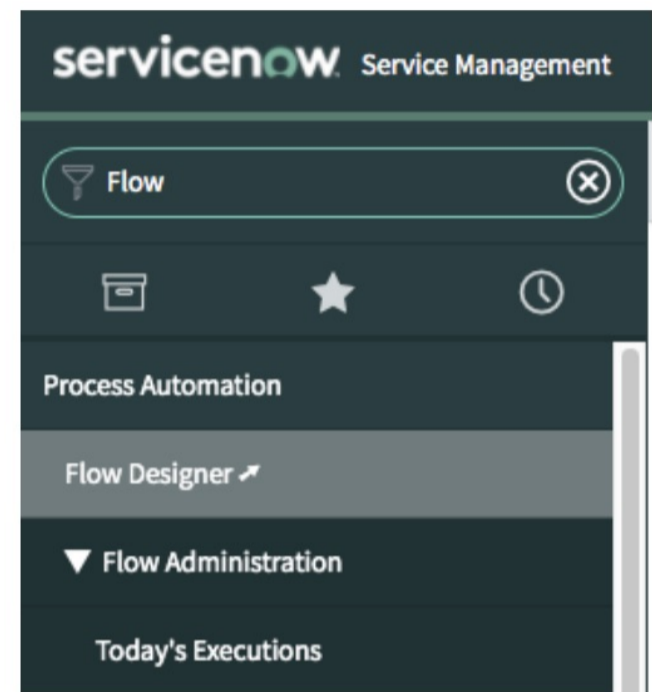
- 2 Select the **PSP Integration Mesh** alias.
- 3 Under the **Connections** section, click **New**.
- 4 Fill in a **Name**, as well as the **Connection URL**, **PSP User**, **PSP Password**, and **PSP Queue** provided by Perspective Support. Click **Submit**.

Set up Flow

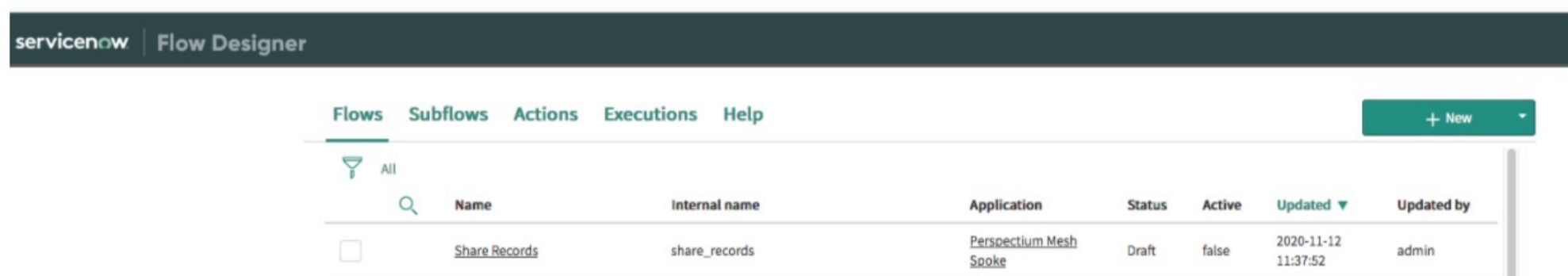
In the Perspective Spoke, there is a Share Records Flow to help with getting started.

Note: The [flow_designer](#) role is required for the user to create and edit a Flow in ServiceNow. Ensure the user has at least the [flow_designer](#) role before proceeding.

- 1 Navigate to **Flow Designer**.



- 2 Under the Flows section, click on the Flow called Share Records. This Flow is a skeleton with some basic logic for sharing out records.

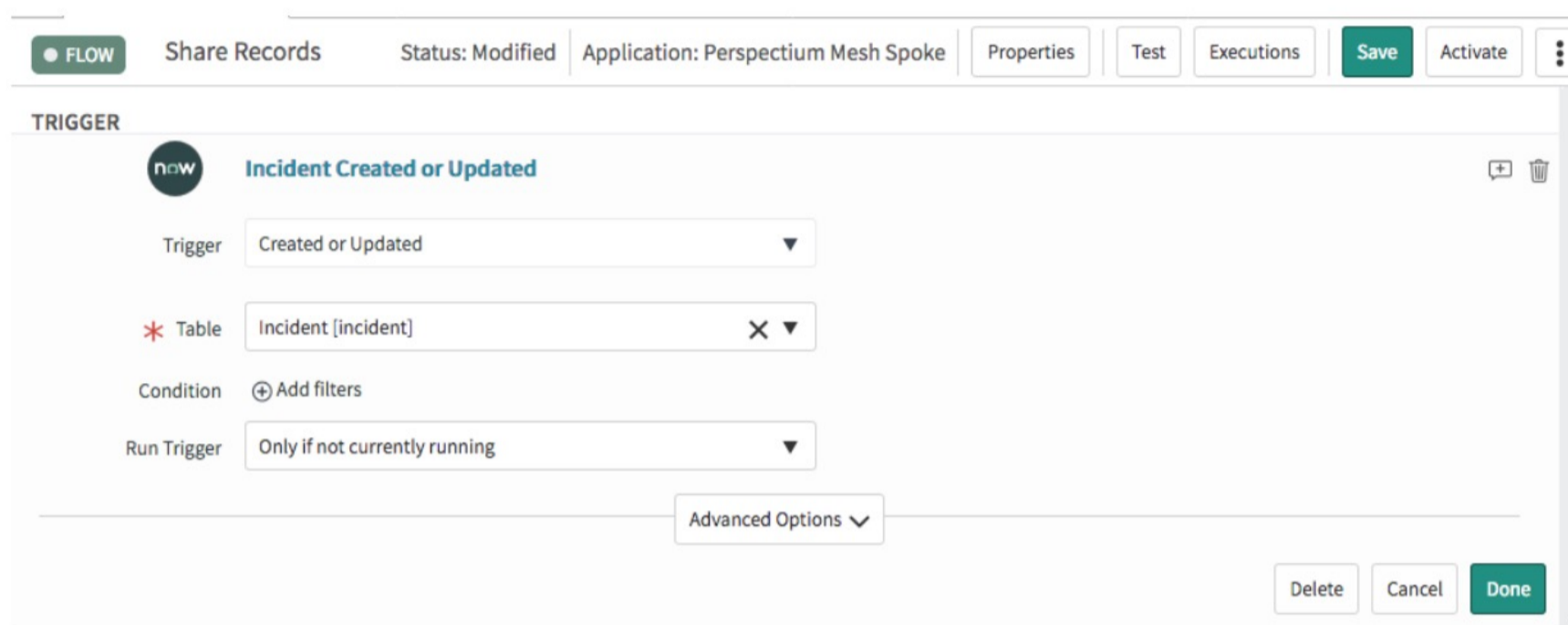


Create a Trigger

- 1 Click **Select to add a Trigger**. Add a Trigger on Record Created, Record Updated, or Record Created or Updated.
- 2 Select the Table to share records from.

Create a Trigger (continued)

- 3 If applicable, for the Run Trigger option, select [Only if not currently running](#). Click Done. This option performs the workaround for London+ releases where Flows are not triggered by Journal Entry updates. [Only if not currently running](#) ensures the Flow is triggered for every unique change, including the addition of comments and work notes. More information about the trigger types is available [here](#).



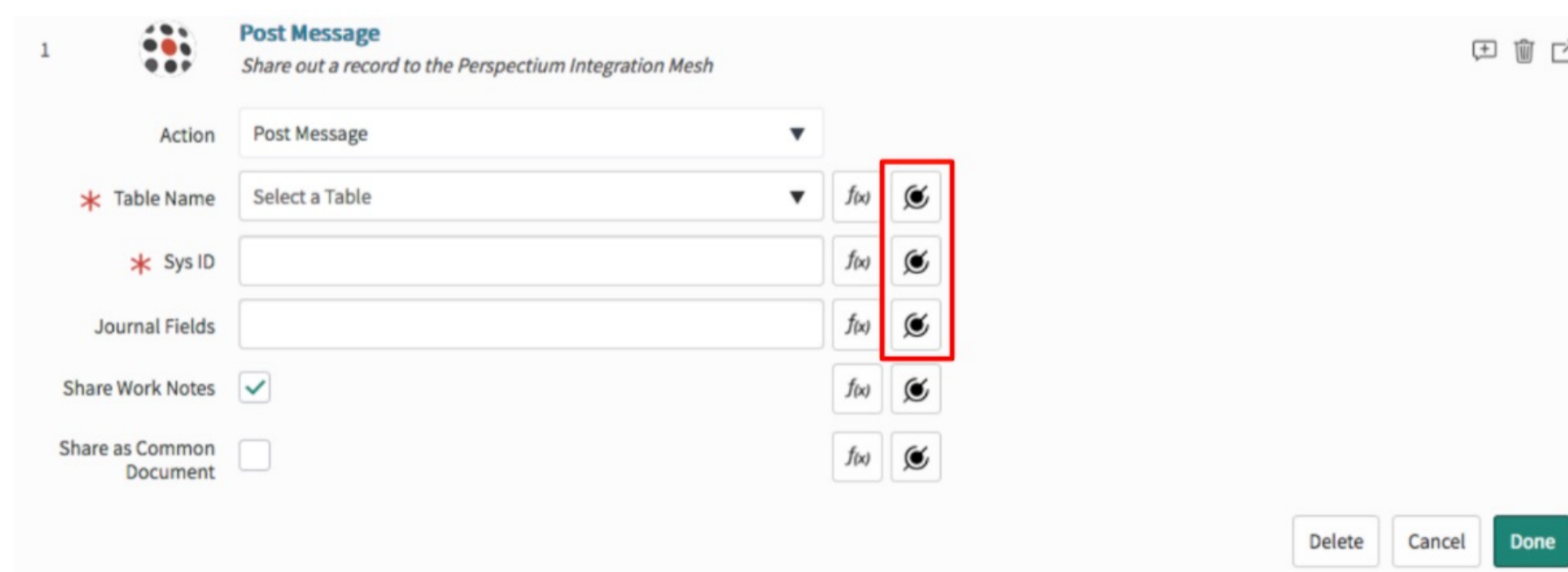
The screenshot shows the 'TRIGGER' configuration panel in the Flow Designer. At the top, there are tabs for 'FLOW', 'Share Records', 'Status: Modified', 'Application: Perspectium Mesh Spoke', 'Properties', 'Test', 'Executions', 'Save', 'Activate', and a menu icon. The main configuration area is titled 'TRIGGER' and includes a 'now' icon and the title 'Incident Created or Updated'. Below this, there are several fields: 'Trigger' set to 'Created or Updated', 'Table' set to 'Incident [incident]', 'Condition' with an 'Add filters' button, and 'Run Trigger' set to 'Only if not currently running'. At the bottom, there is an 'Advanced Options' dropdown and 'Delete', 'Cancel', and 'Done' buttons.

A trigger on the Incident table will look similar to the example above.

Add Post Message Action

The Post Message Action is the Flow Designer component that is responsible for sharing out a record to the Perspectium Integration Mesh. When a record triggers the custom Flow, Post Message Action builds a message containing the record to share out to the Perspectium Integration Mesh.

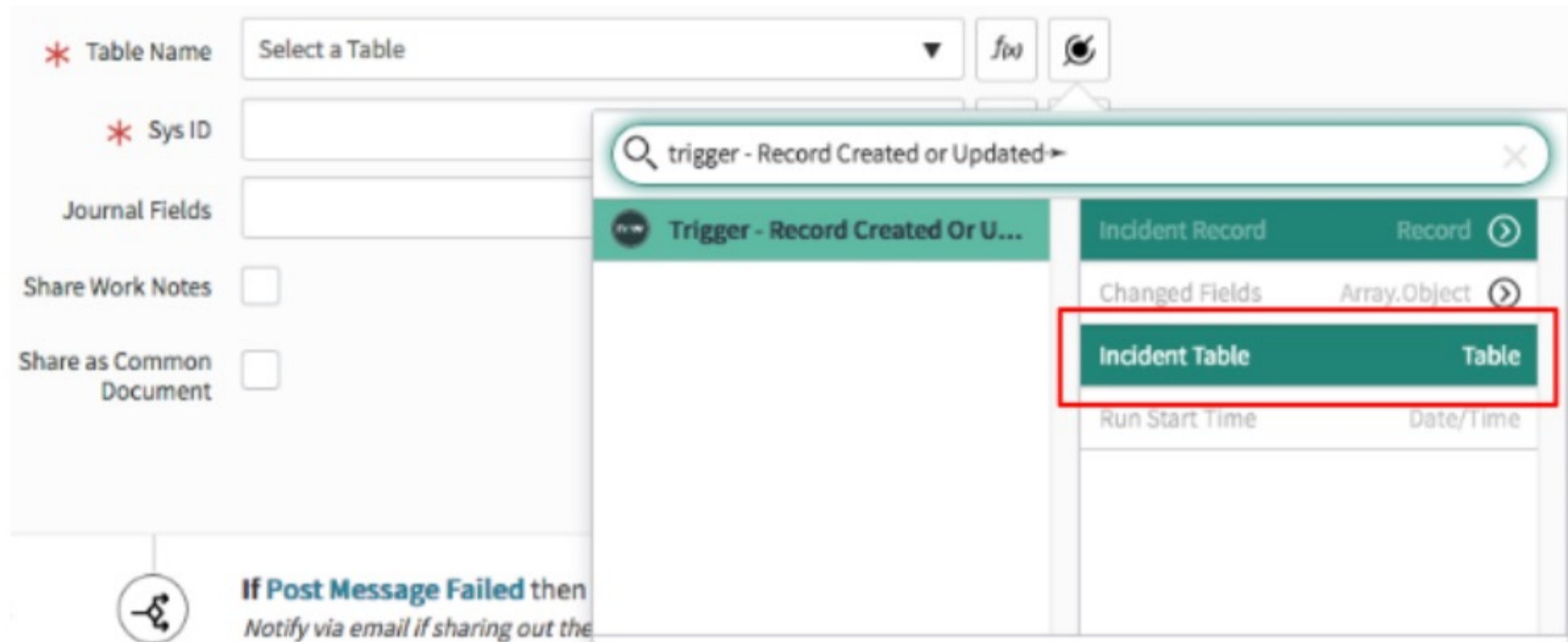
- 1 Click on the Action 1 in the Flow, the Post Message step.
- 2 Use the [Data Pill Picker](#) to fill in the Table Name, Sys ID, and Journal Fields slots.



The screenshot shows the 'Post Message' action configuration in the Flow Designer. The action is titled 'Post Message' and has the description 'Share out a record to the Perspectium Integration Mesh'. Below the title, there are several fields: 'Action' set to 'Post Message', 'Table Name' set to 'Select a Table', 'Sys ID', 'Journal Fields', 'Share Work Notes' (checked), and 'Share as Common Document' (unchecked). To the right of each of the 'Table Name', 'Sys ID', and 'Journal Fields' fields, there is a 'Data Pill Picker' icon (a circle with a magnifying glass) which is highlighted with a red box. At the bottom, there are 'Delete', 'Cancel', and 'Done' buttons.

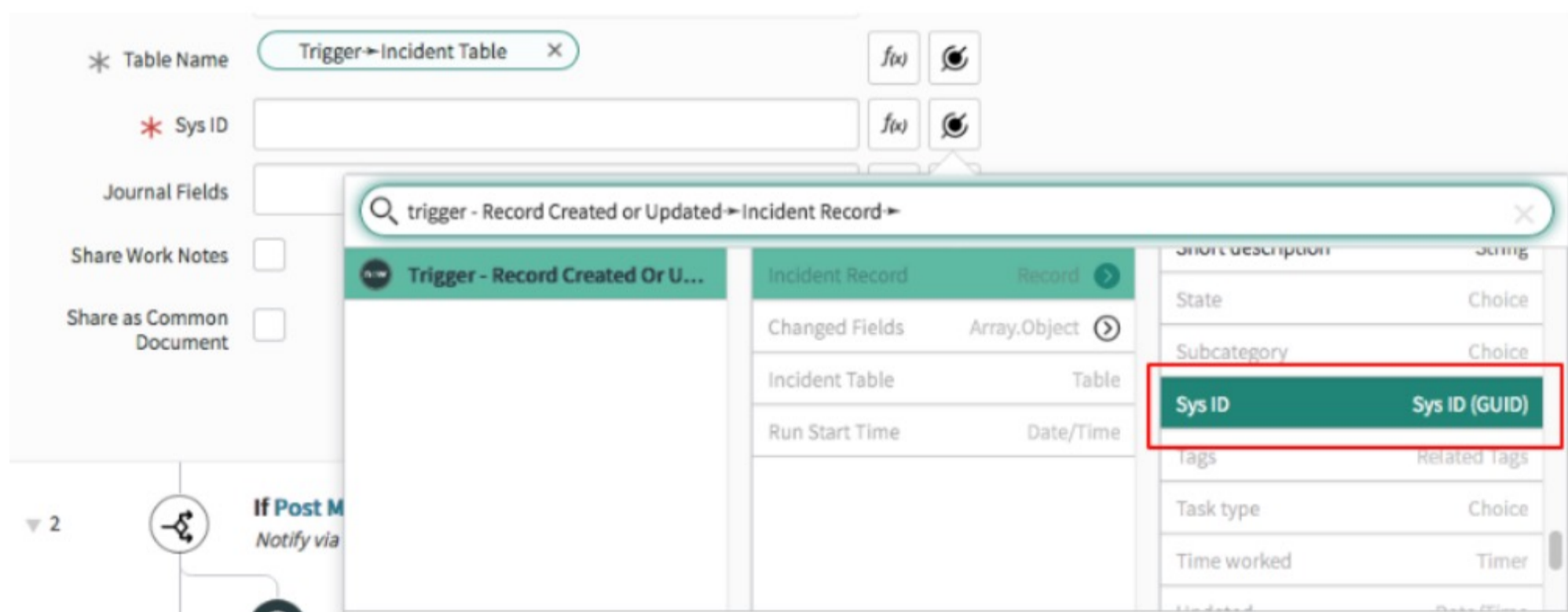
Add Post Message Action (continued)

- 3 Table Name: Click on the Data Pill Picker symbol to the right of the Table Name slot to open the flyout. Click on Trigger, then select the Table option, which will contain the name of the table that is being used to trigger the Flow.



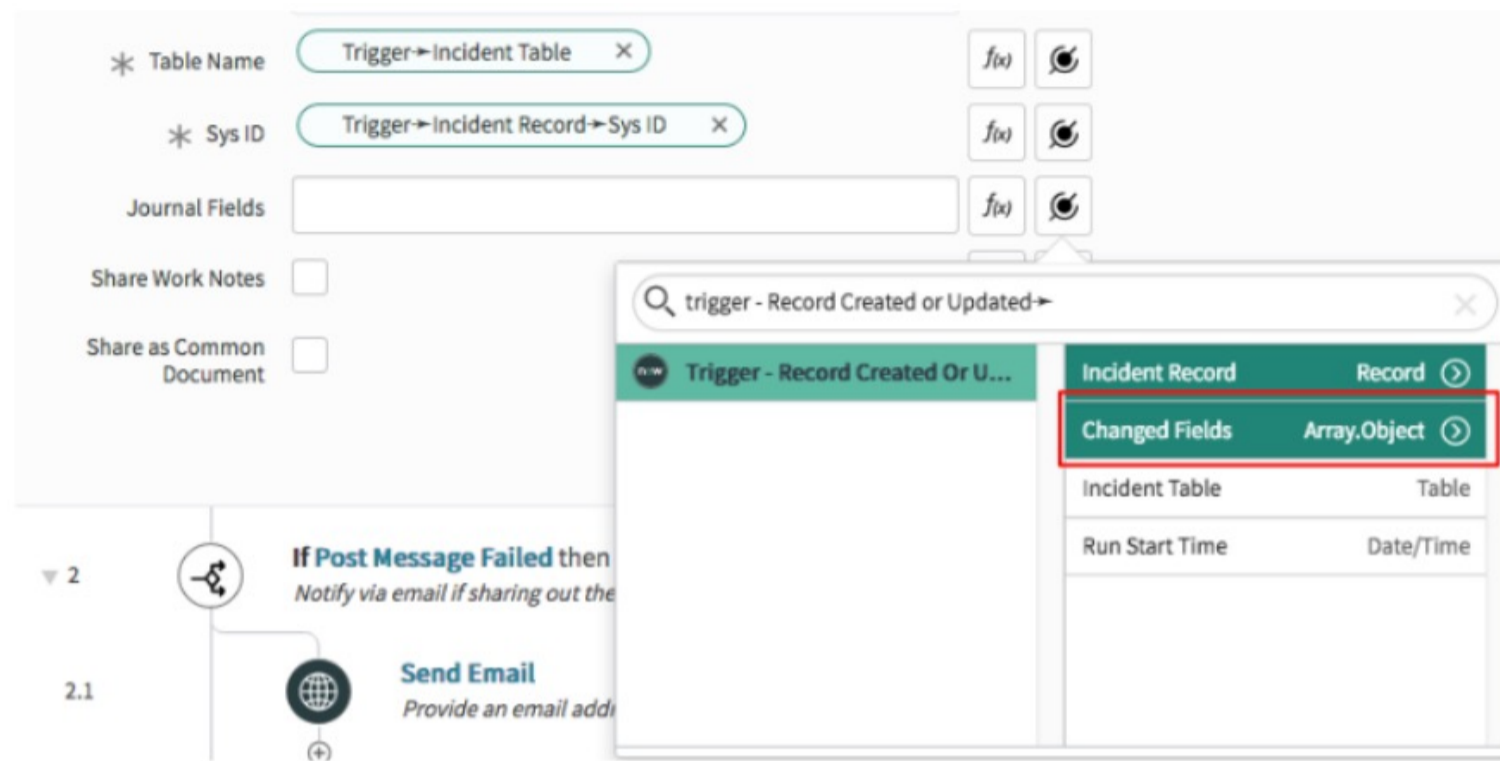
When the Trigger is set on the Incident table, the Data Pill will display “Incident Table”.

- 4 Sys ID: Click on the Data Pill Picker symbol to the right of the Sys ID slot to open the flyout. Click on Trigger, then select the arrow on the Record option. From the list of record elements, select the Sys ID option.

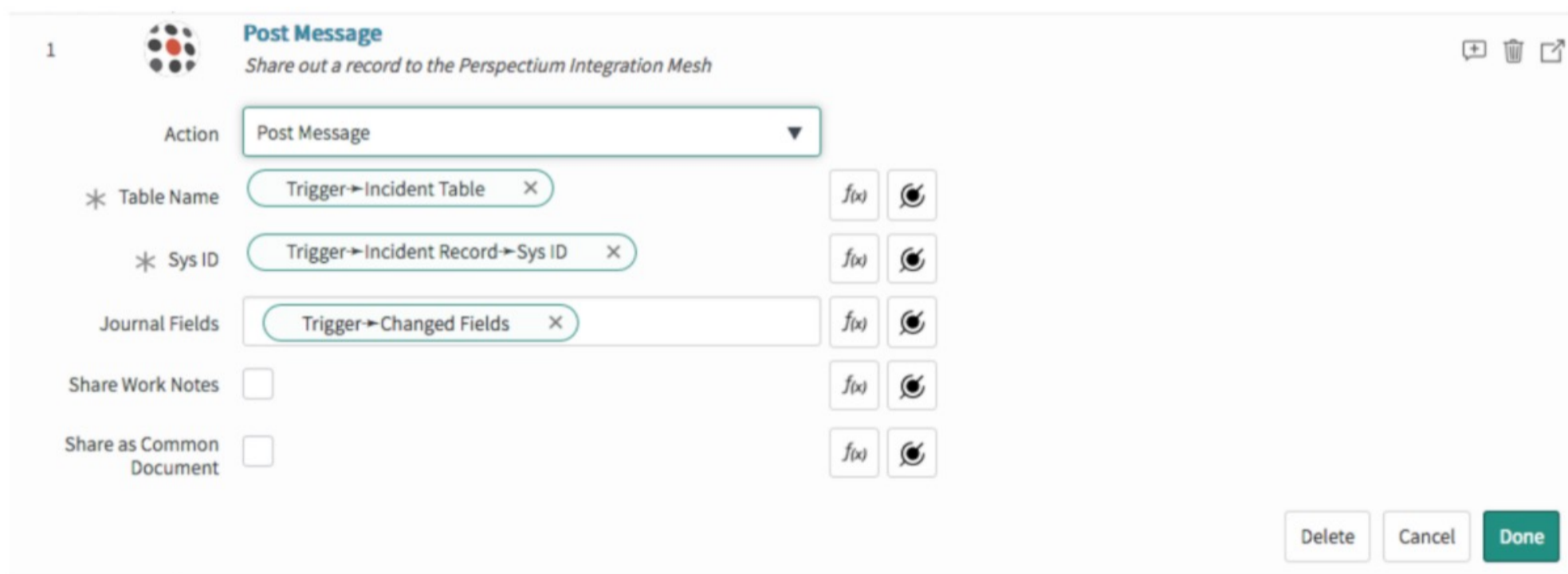


Add Post Message Action (continued)

- 5 Journal Fields: Click on the Data Pill Picker symbol to the right of the Journal Fields slot to open the flyout. Click on Trigger, then select the Changed Fields option. This will allow comments and work notes to be shared out in the record payload.



- 6 If the records need to be shared in Perspective's [Common Document](#) format, check the Share as Common Document box. Tables [supported](#) in Common Document format for the Perspective Spoke are Change Request, Incident, Problem, Request, Requested Item, and Task.
- 7 If work notes need to be shared out as well, check the Share Work Notes box.



Above is a sample Post Message setup with the Trigger set on the Incident table.

Set up Email Notifications

In the case that the record fails to share out, it will be beneficial to know what caused the failure. With Actions 2 and 2.1 of the Share Records Flow, an email notification will be sent to an address containing information about the specific record that failed and the error. One email will be sent for each record that fails to share out successfully.

Note: If the user executing the Flow does not have the **admin** role, email notifications may not send out. In order to run the Flow with elevated privileges, navigate to the Flow's Properties and change the Run As option to System User.

- 1 In order to be notified via email if the records failed to get shared out, click on the icon of Action 2, the [If logic](#).
- 2 Using the Data Pill Picker, click on 1 - Post Message. Then click on the Status Code option.
- 3 Using the dropdown menu, select “is not” and in the text box, type in “200”. This ensures that when a record fails to share out, more steps will be taken.

2 **If**
Notify via email if sharing out the record to the Perspectium Integration Mesh fails

Condition: Post Message Failed

* Condition 1: 1 -> Status Code is not 200

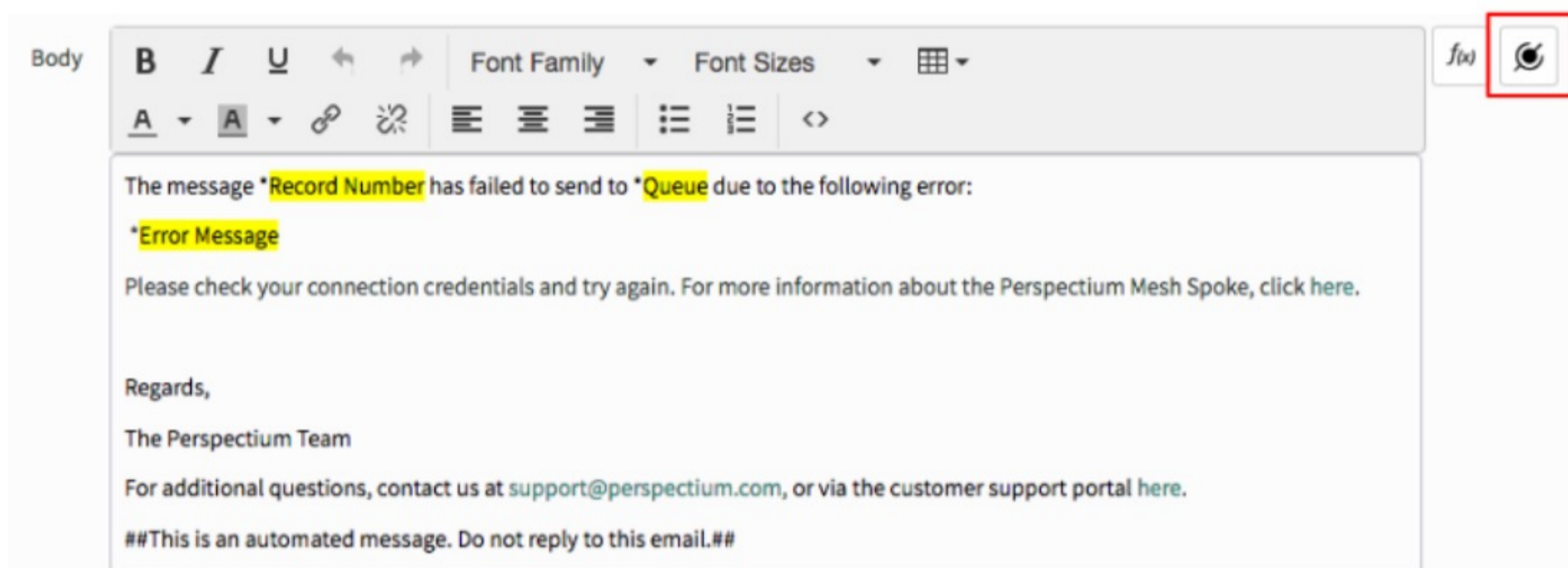
Add another condition set(OR)

Delete Cancel Done

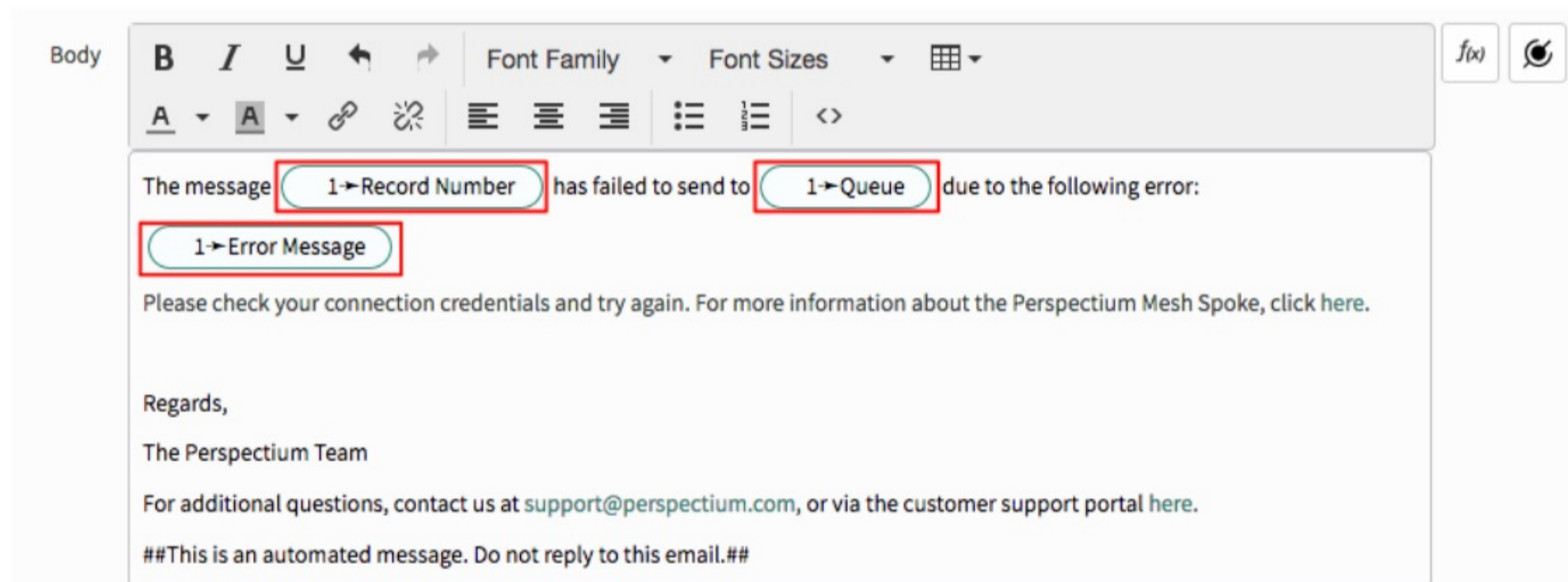
- 4 Next, click on the icon for Action 2.1, the Send Email step.
- 5 Enter an email address in the To input box.

Set up Email Notifications (continued)

- 6 In the body of the email, the Record Number, Error Message, and Queue can be added to provide more information. Replace the highlighted words with the appropriate Data Pills by using the Data Pill Picker, clicking on 1 - Post Message, and selecting the matching option.



Above is the default email body without Data Pills.



Above is the completed email body with Data Pills.

- 7 In the upper right corner of Flow Designer, click Save and then click Activate. Confirm Flow Activate if needed.

After the flow is activated, records should be sent out of the instance when the flow is triggered. To confirm records are being shared, check the [Flow Executions](#).

Notes

- Using the Changed Fields pill will ensure that comments are shared out in the same payload as the base record.
- The Catalog Task (sc_task) table is [not supported](#) by Flow Designer and cannot be used to trigger flows.
- The Requested Item (sc_req_item) table is supported by Flow Designer for inserts only, and does not support sharing out comments and work notes. Flows triggered on Requested Items require the use of the [Service Catalog trigger](#), which requires the [Service Catalog plugin](#).

Resources

Documentation

Documentation on the Perspectium Spoke application and its features can be found on the [Perspectium docs site](#).

Additional Support

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