perspectium

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.

Set Up Initial Configurations for DataSync Free

DataSync Free Initial Setup

To set up the initial configurations after [installing](#) the DataSync Free app into your instance,

1. **Switch to the Perspectium DataSync Free Application Scope**
   The DataSync Free 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:
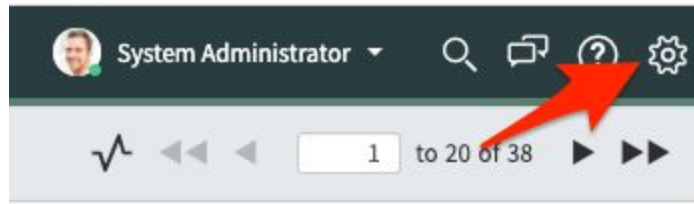

   On the Developer tab, select **Perspectium DataSync Free** as the **Application. Note:** This action is only required for users with the **admin role** since admin users have the ability to choose different application scopes (non-admin users will automatically be in the DataSync Free scope).
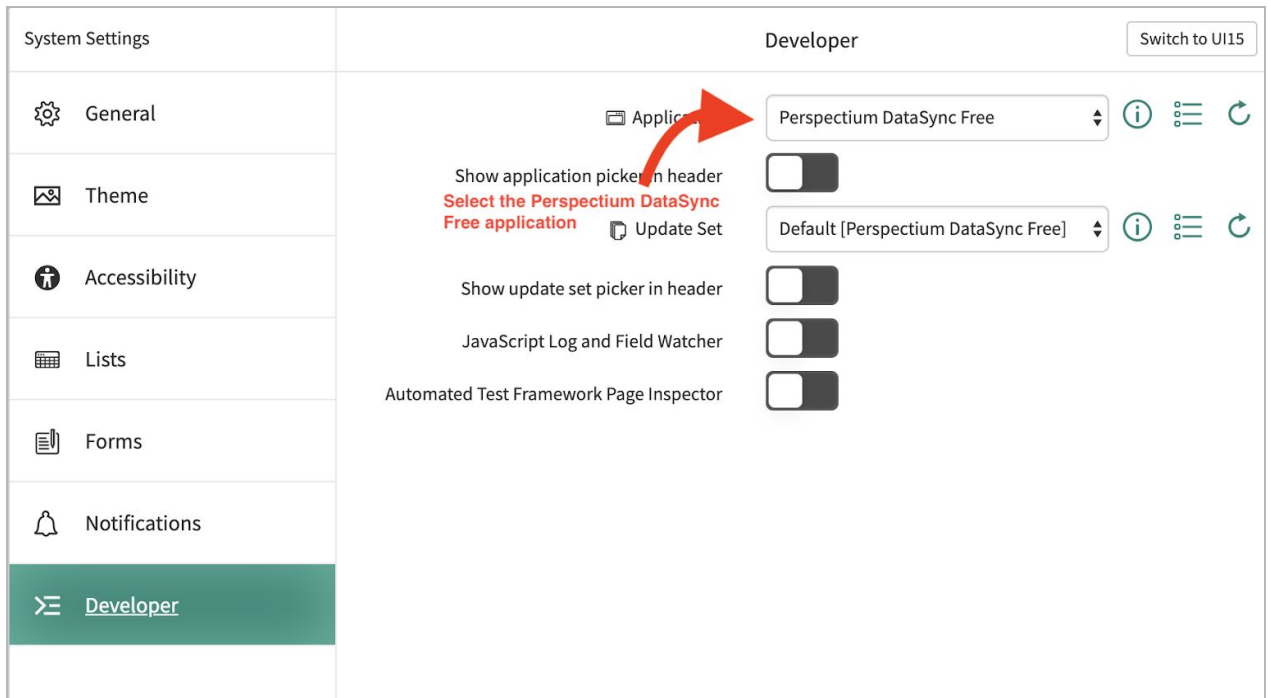
2. **Navigate to the Perspectium DataSync Free application**

In the Filter Navigator of the [Application Navigator](#) menu, type in "perspectium" to find the Perspectium DataSync Free application:
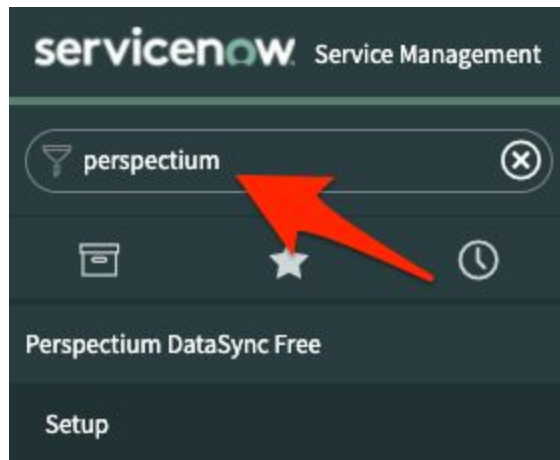
3. **Read and accept the User Agreement terms**

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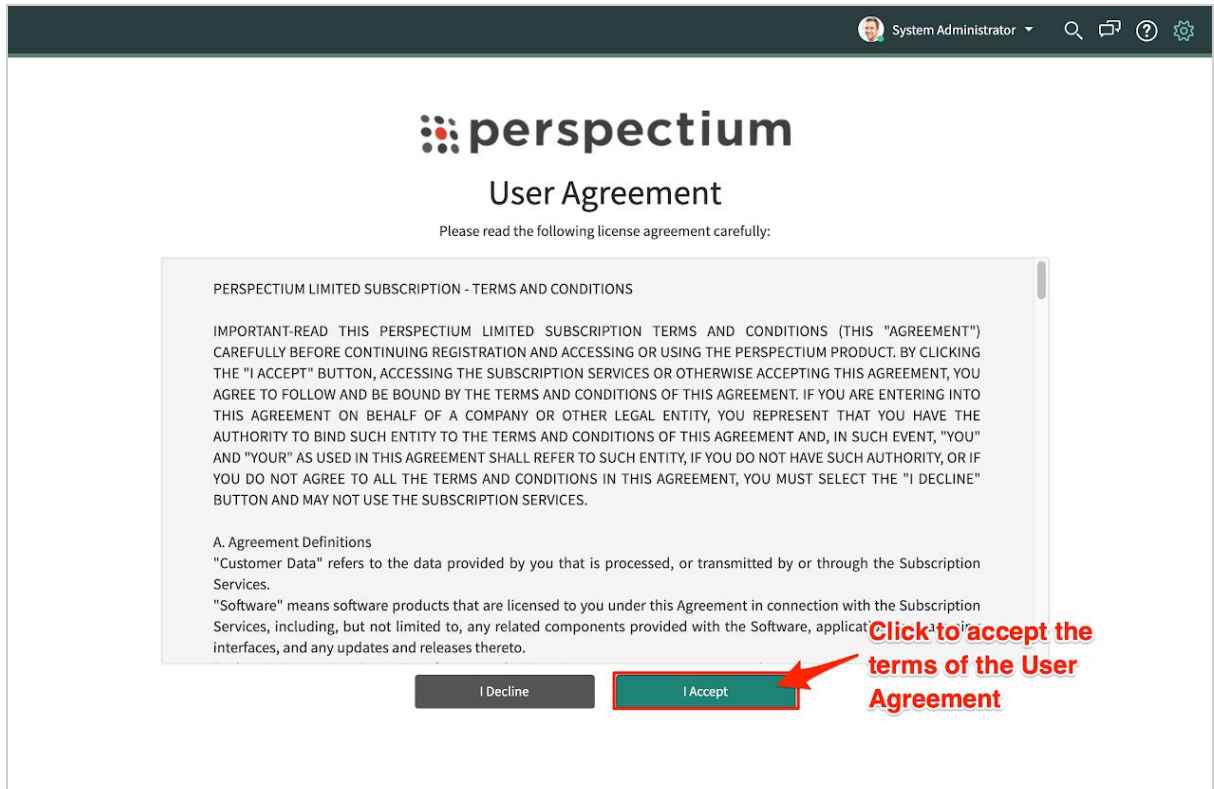
4. **Register your Perspectium account**
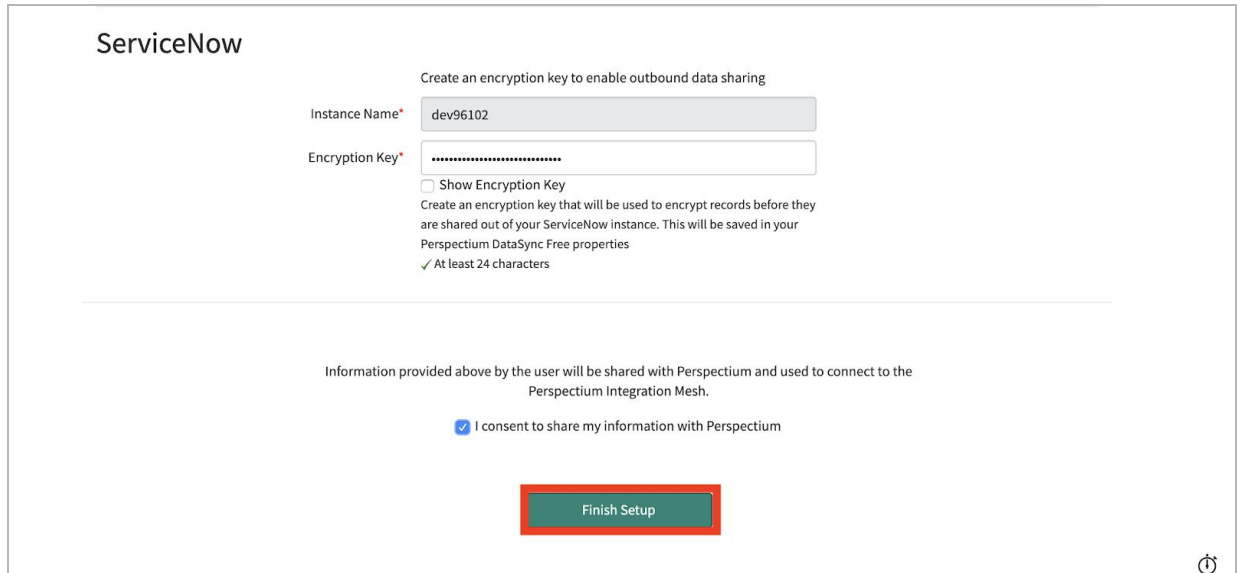
   On the DataSync Free Registration & Setup page, type your first and last name, company name, and email in the appropriate fields. Then, create a password. Your password must be 8+ characters, including at least one uppercase letter, one lowercase letter, and one special character with no whitespace.

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

5. **Create an encryption key**
   Type an encryption key of 24+ characters in the **ServiceNow** section. This key is used to encrypt data being sent out of your ServiceNow instance to your Perspectium Cloud database. 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 your account.

6. **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 Free 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.

7. **View your data on a database viewer or reporting tool**
   Access and view the Perspectium 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 Perspectium Integration Mesh and the Perspectium 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 Free allows sharing only from the **Incident (incident)** table.
- The user is limited to have the maximum of <u>one</u> 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. 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 scheduled 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.

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

6. From the resulting list of scheduled bulk shares, click back into the scheduled bulk share that you created in **Step #5**.

7. 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

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.