



# 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.

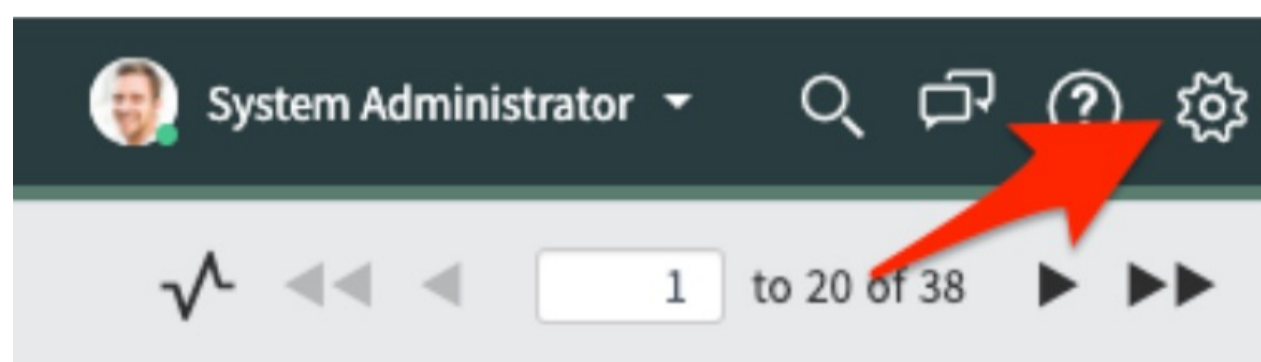


## Setting Up Initial Configurations

### 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:

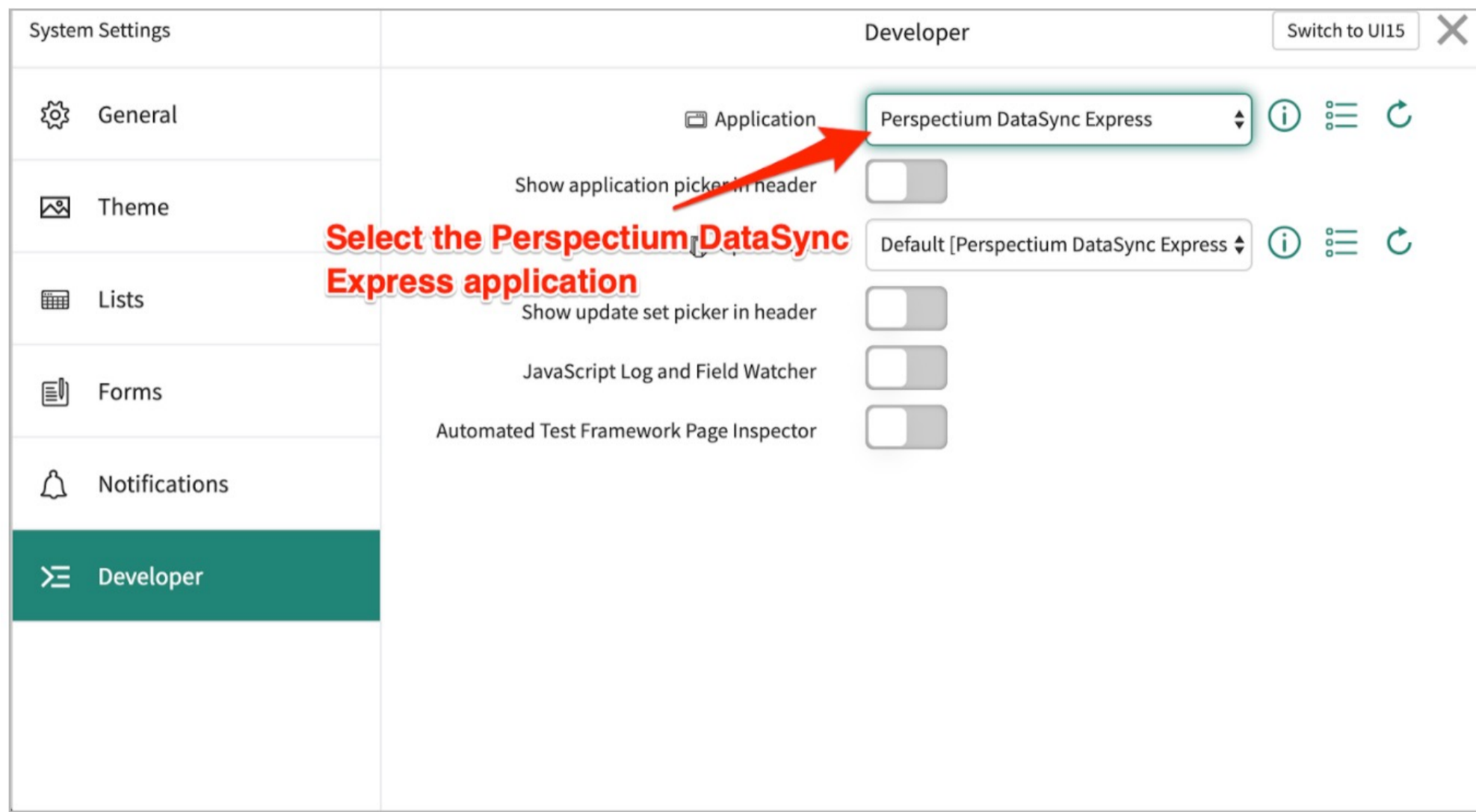


1

### (Step 1 Continued)

On the Developer tab, select **Perspectium DataSync Express** as the **Application**.

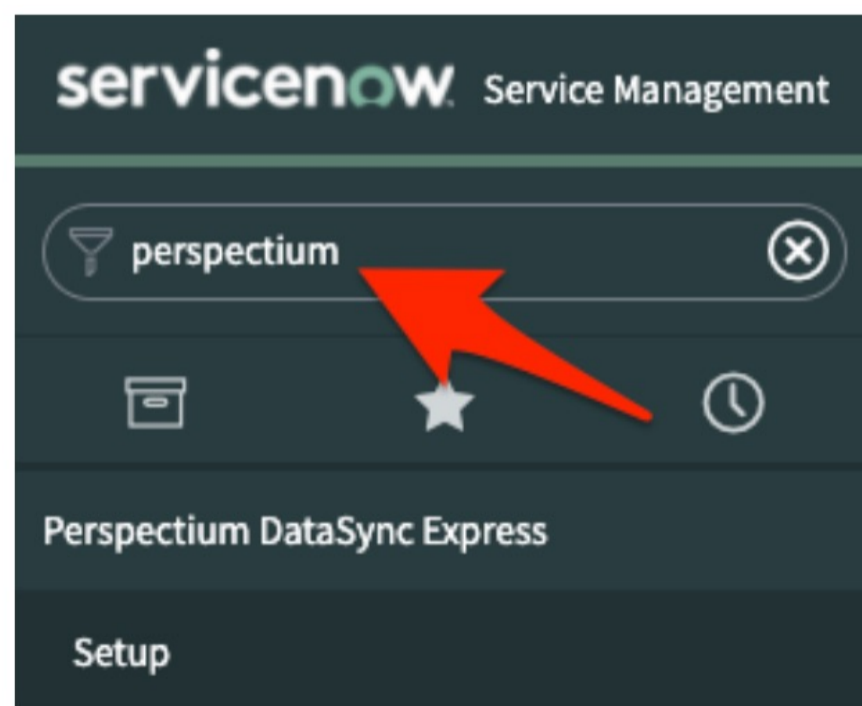
**Note:** This action is **only required** for users with the **admin role** since admin users have the ability to choose different application scopes (non-admin users will automatically be in the DataSync Express scope).



2

### Navigate to the Perspectium DataSync Express Application.

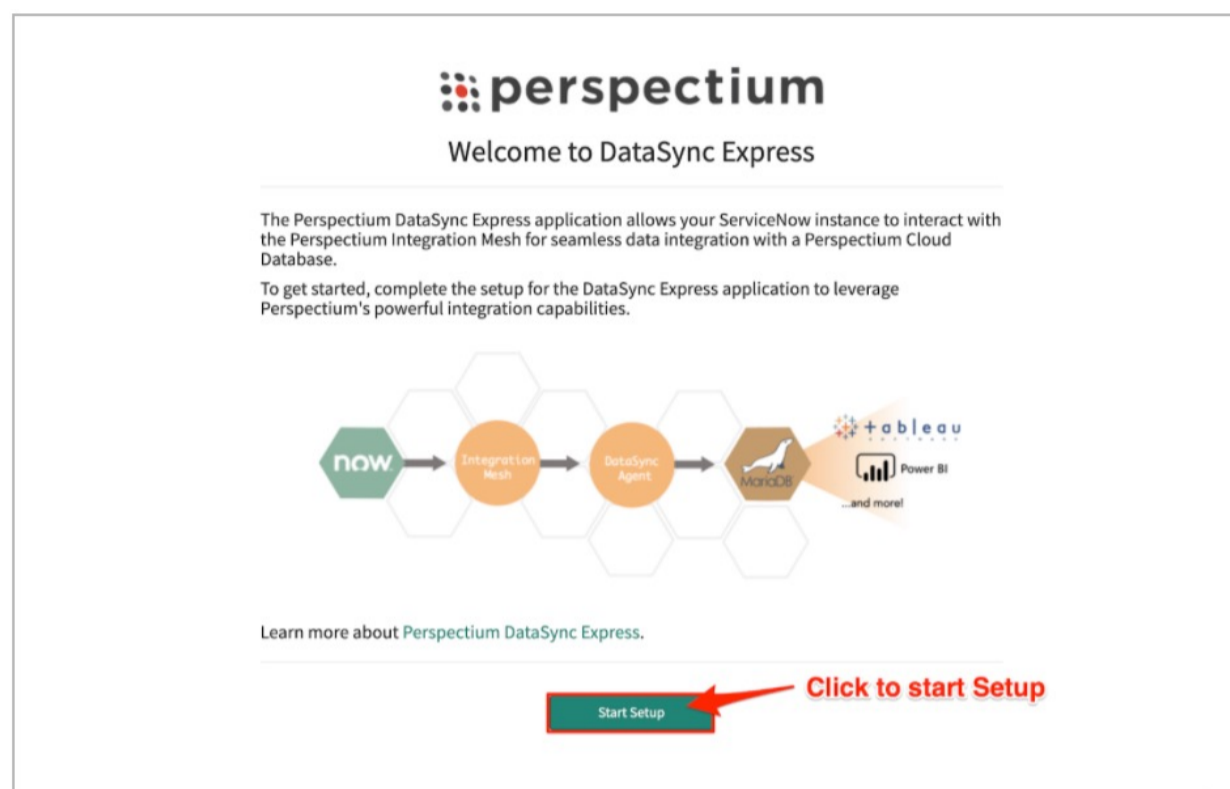
In the Filter Navigator of the [Application Navigator](#), type in “perspectium” to find the Perspectium DataSync Express application:



3

### Navigate to the Setup module and start Setup

Navigate to **Perspectium DataSync Express > Setup** to access the Welcome page. Then, read through and start the setup for DataSync Express by clicking **Start Setup** at the bottom of the page.



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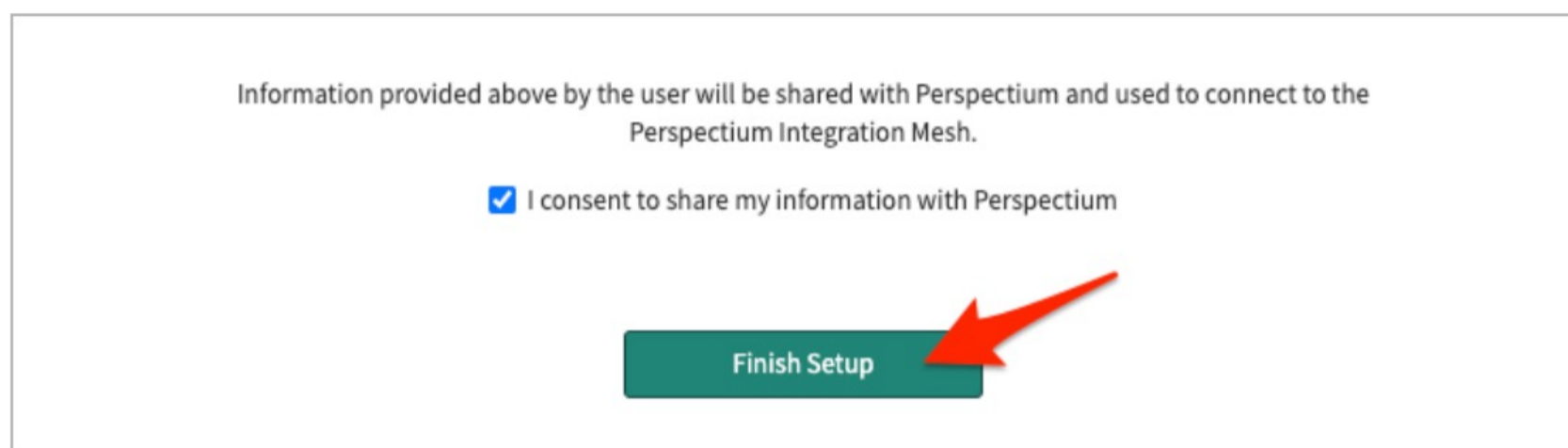
### Register your Perspectium account.

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.

## 5 Consent to submitting information and click Finish Setup.

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.



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

I consent to share my information with Perspectium

Finish Setup

## 6 Receive information to connect to your database.

The setup will take a few minutes and you will be emailed 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](#).

## 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 Express 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 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**. 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 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.

The screenshot shows the 'Bulk Share' configuration interface. The 'Name' field is empty, and the 'Table name' dropdown is set to 'Catalog Task'. The 'Records Processed' and 'Records per second' fields are also empty. The 'Status' is set to '-- None --'. The 'Started', 'Completed', and 'Duration' fields are empty. The 'Obfuscated Records' field is set to 0. The 'Additional Settings' section has several checkboxes: 'Include attachments', 'Include journal fields', 'Include audit log', 'Include history set', 'Include child only' (checked), and 'Include referenced field records'. The 'Run schedule' field is empty. At the bottom, there are 'Save' and 'Execute Now' buttons. Red arrows and text annotations highlight the 'Name' field with 'Choose a name', the 'Table name' dropdown with 'Choose a table for the bulk share', and the 'Save' and 'Execute Now' buttons with 'Click Save to finish creating your bulk share Or click Execute Now to run your bulk share immediately'.

**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 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 Perspective 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 Perspective 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 [Perspective's Community Forum](#) or [contact the Perspective Support team](#).