perspectium

On-demand DataSync
App User Guide

Overview

The **Perspectium On-demand DataSync** app enables end-to-end provisioning into your AWS account via the AWS ServiceNow Catalog while automatically creating and maintaining your data schemas.

Initial Installation & Configuration

Installing the app

To install On-demand DataSync on your ServiceNow instance, follow these steps:

1. **Activate the User Criteria Scoped API plugin**
   Log into your ServiceNow instance and navigate to **System Definition** > **Plugins** and search for **com.glideapp.user_criteria.scoped.api (User Criteria Scoped API)** and click **Active/Repair** under **Related Links.** Then, click **Activate.** (If using a Madrid instance, click **Install** > **Activate** > **Close & Reload Form.**)

2. **Navigate to Retrieved Update Sets**
   Navigate to **System Update Sets** > **Retrieved Update Sets** or simply type **Retrieved Update Sets** in the Filter Navigator on the upper left-hand side of the screen.

3. **Upload the required update sets**
   In the resulting form, click **Import Update Set from XML** under the **Related Links** section. Upload the Perspectium for ServiceNow update set (.xml file) provided by Perspectium Support **in the following order**:
   - Perspectium Master Scoped App update set
   - AWS Service Catalog Connector update set
   - Perspectium Incident Integration update set
   - Intelligent Incidents Global Dependencies update set
   - Intelligent Incidents update set

4. **Preview the update sets**
   Click the name of each update set you uploaded in **Step #2.** Then, in the upper-right hand corner of the resulting form, click **Preview Update Set** for each update set.

5. **Resolve potential errors**
   After Preview Update Set finishes running for an update set, close out of the pop-up and check if there are any errors or warnings. If errors or warnings have occurred, they will appear in the list at the bottom of the form under the **Update Set Preview Problems** tab. Check the box next to each error or warning and choose whether to **Accept remote update** or **Skip remote update.** To view previously configured fields

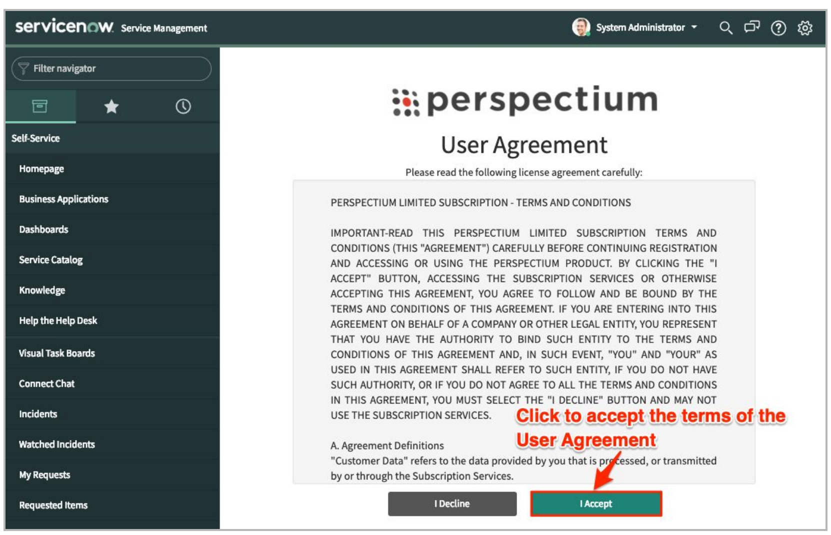
and updates that may be affected for each error or warning, click **Show local field** and/or **Show local update**. For more information, see preview a remote update set.

6. **Commit the update sets**
   Once any errors or warnings have been addressed, click **Commit Update Set** in the upper right-hand corner of the form for each update set you uploaded in **Step #2**. After Update Set Commit finishes running for an update set, close out of the pop-up.

Setting your initial configurations

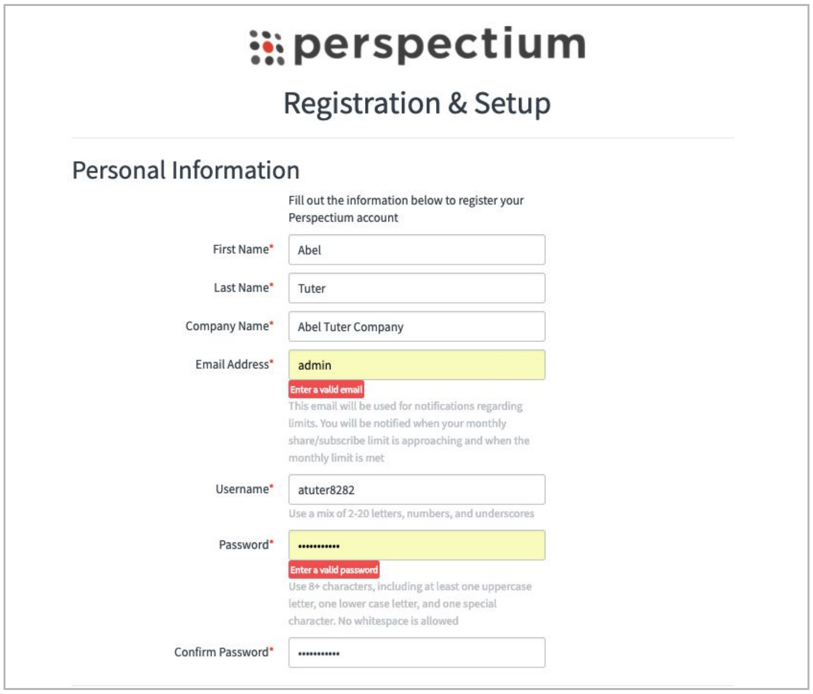
To set the initial configurations for your On-demand DataSync app, follow these steps:

1. **Read and accept the User Agreement terms**
   Read through the terms of the Perspectium User Agreement (Navigate to **Perspectium** > **Control and Configuration** > **Properties** > **Sign Agreement** to access the User Agreement page). Then, accept the agreement terms by clicking **I Accept** at the bottom of the form.

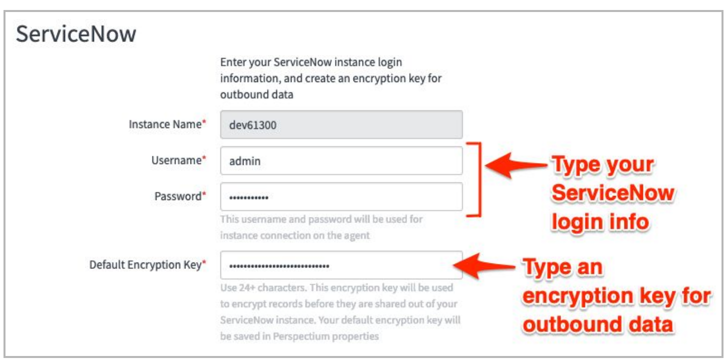


2. **Register your Perspectium account**
   Navigate to **Perspectium** > **Control and Configuration** > **UI Pages** > **perspectium_registration** > **Try It** to access the **Registration & Setup** page. On this page, you will need to register an account with Perspectium. Type your first and last name, email, username, and password in the appropriate fields.

   NOTE: The email address you provide will receive notifications about monthly share/subscribe limits.



3. **Enter your ServiceNow instance login info**
   Scroll down to the **ServiceNow** section. Type the username and password used to log into your ServiceNow instance. Then, type an encryption key of 24+ characters for Base64 encoding, AES-128 encryption, or TripleDES encryption.

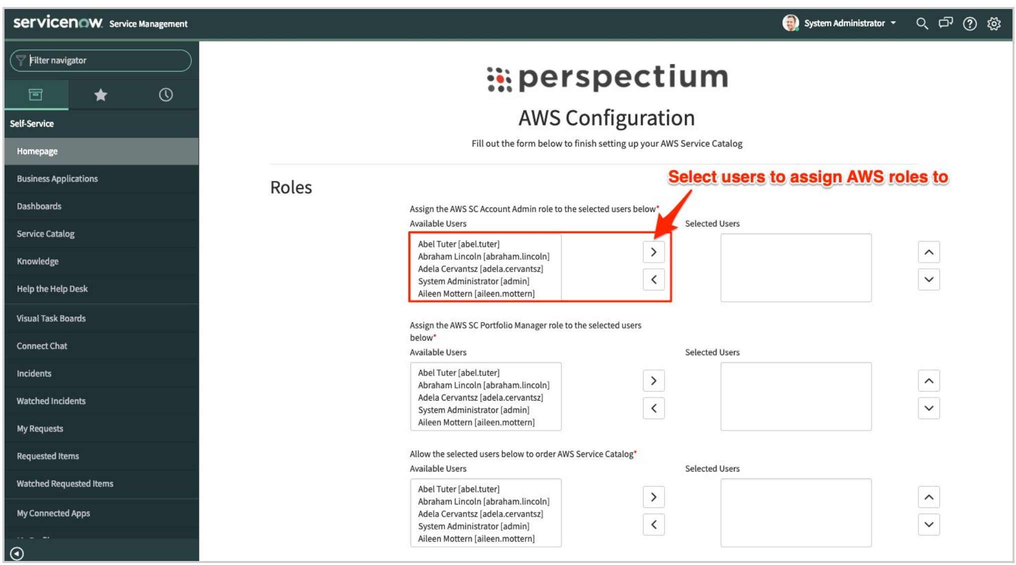


4. **Enter your agent OS and database information**
   Scroll down to the **Agent** section. Then, choose the operating system that your Perspectium agent will run on from the **Operating System** dropdown. Scroll down to the **Database** section. Choose the type of database, database server, port, login information, and name for the local database you will share records to.

5. **Set your AWS Service Catalog configurations**
   Before accessing the AWS Service Catalog in ServiceNow, you will need to follow the steps for **AWS Prerequisites** under **Getting Started** at [How to install and configure the AWS Service Catalog Connector for ServiceNow]().

   NOTE: **Do not** follow steps other than those noted in the **AWS Prerequisites** section at the link above.

6. **Assign AWS Service Catalog roles to users**
   Navigate to **Perspectium** > **Control and Configuration** > **UI Pages** > **perspectium_aws_configuration_form** > **Try It** to access the **AWS Configuration** page. On the **AWS Configuration** page, choose users from the lists on the left (**Available Users**) to assign AWS Service Catalog roles to.

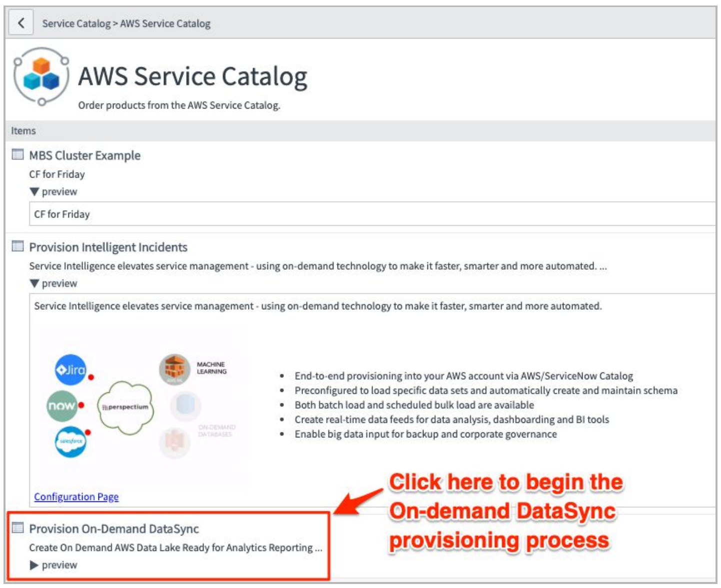


7. **Enter your AWS Region and Access Keys**
   Scroll down to the **AWS** section. From the **Region** dropdown, select the [region associated with your AWS account](). Then, type the **Access Key** and **Secret Access Key** associated with your AWS account. These keys can be [found in the Identity and Access Management (IAM) section]() of your AWS account. Finally, click **Submit** at the bottom of the form.

Provisioning On-demand DataSync

To sync your ServiceNow data with your AWS Relational Database Service (RDS) instance, follow these steps:

1. **Navigate to On-demand DataSync**
   After following the steps for initial installation & configuration of the On-demand DataSync app, you will be redirected to ServiceNow's AWS Service Catalog connector page. On this page, click **Provision On-Demand DataSync**.

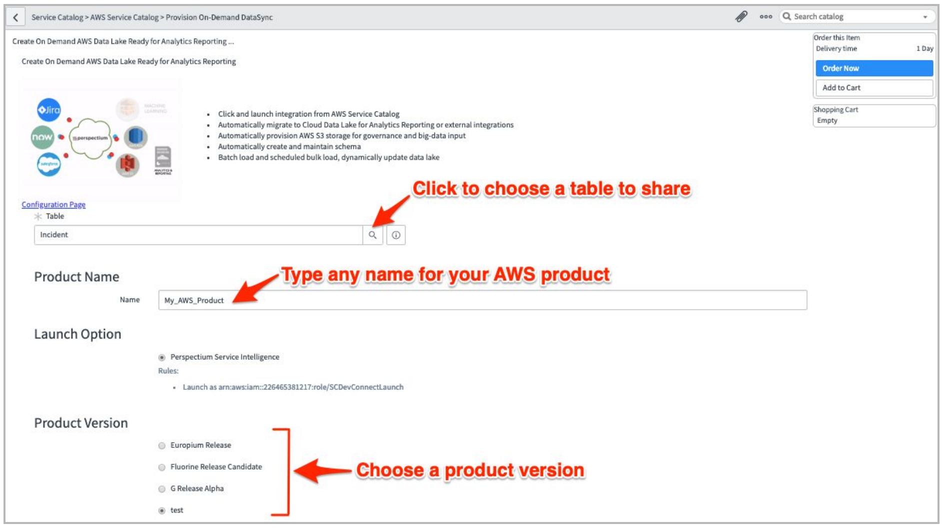


2. **Choose a table**
   Click the magnifying glass next to the **Table** field. Then, choose a table whose data you want to share to your AWS RDS instance.

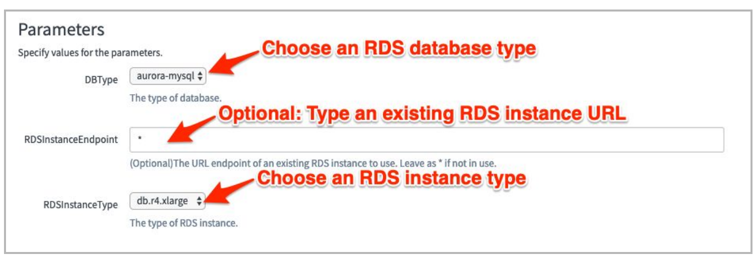
3. **Enter a product name**
   In the **Name** field, type a unique name for your On-demand DataSync product. Do not enter a previously used name for another On-demand DataSync product.

4. **Choose a product version**
   In the **Product Version** section, choose a version option that you want to configure your cloud formation on.

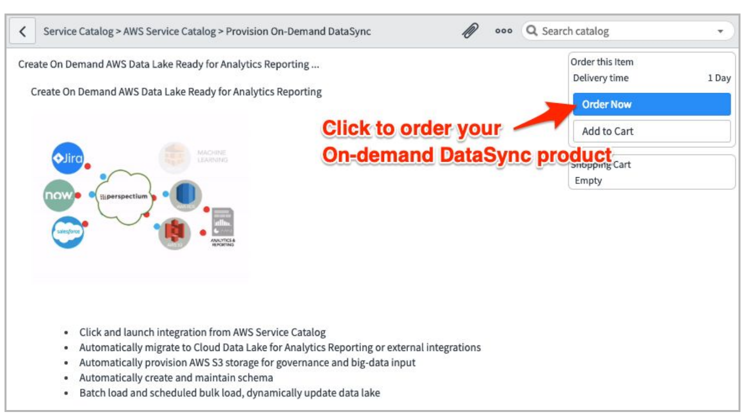
   <u>NOTE</u>: "Fluorine Test" is the only option that will work for the beta version of this app.



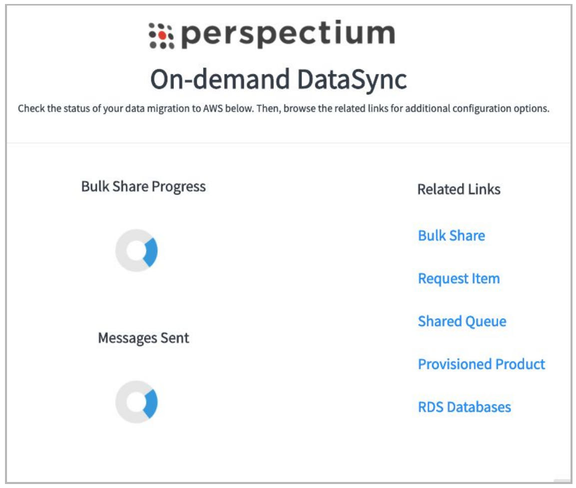
5. **Choose your parameters**
   Select an RDS database type to provision on AWS from the **DBType** dropdown. For more information about RDS database types, see [Amazon Relational Database Service](). If you would like to share your data to an existing RDS instance, type the URL of the instance in the **RDSInstanceEndpoint** field. Finally, choose an RDS instance type from the **RDSInstanceType** dropdown.



6. **Order On-demand DataSync**
   Scroll up, and click **Order Now** in the top right-hand corner of the form.



7. **Confirm sharing of your ServiceNow data to AWS**
   The status of data sharing to AWS will be displayed on the following page. After the status shows as **100%**, you can browse the **Related Links** to view information about the data you have shared to AWS.



8. **Share your data to a local database or analytics tool (optional)**
   To run analysis and reporting on the data you have synced with AWS, you can also add your AWS RDS database as a connection to your MySQL client or connect your RDS database as a data source in Tableau.