

Get started with Snapshot

DataSync Snapshot reliably, comprehensively backs up ServiceNow objects and data without impacting performance, and all from within the [Perspectium DataSync application](#).

Once you have created and executed a backup, you will have the option to restore the records in the selected table(s) in your ServiceNow instance or another ServiceNow instance.

NOTE: You will need to have **MBS 3.0** to properly run backup and restore. For more information, contact [Perspectium Support](#).

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Prerequisites

! You need the following information from [Perspectium Support](#):

- Perspectium Integration Mesh (MBS) server URL
- Integration Mesh (MBS) vhost
- Integration Mesh (MBS) username
- Integration Mesh (MBS) password

! Then, you need to [install the Perspectium application into your ServiceNow instance](#) by installing update sets **in the following order**:

1. Perspectium Core update set
2. Perspectium Snapshot update set

Follow the link to [Get Started with DataSync for ServiceNow](#).

Initial Setup

Before you begin, you will need set up initial configurations in Perspectium's General Settings:

Set up general settings

1

Log into your ServiceNow instance and navigate to **Perspectium > Control and Configuration > Properties** or simply type **Control and Configuration** in the Filter Navigator on the upper left-hand side of the screen. and then click **Properties**.

Then, click **General Settings**.

2

Type your Perspectium Integration Mesh **username**, **password**, and **server URL** in the appropriate fields.

NOTE: In the username field, you will need to prepend the username with your vhost name, i.e. vhost/user.

Then, scroll down to the bottom of the page and click **Save**.

3

If you will be restoring table(s) into another ServiceNow instance, repeat steps 1 and 2 with the same Integration Mesh (MBS) credentials in the other instance.

General Configurations

Create a backup

1

Log into your ServiceNow instance and navigate to **Perspectium > DataSync > Snapshot** or access through the **Getting Started** page.

2

Next click **+ New Backup**.



DataSync Snapshot

The Perspectium DataSync Snapshot feature allows arbitrary ServiceNow tables or groups of tables to be backed up and restored back into the same or other ServiceNow instances. This feature can also be used to migrate data, script, schema and configurations between ServiceNow instances. For more resources and information, visit the Perspectium Docs or contact Perspectium support.

[Perspectium Docs](#)

Backup Status



There are currently no backups in progress. Press the "+ New Backup" button to create a new backup or choose a backup to restore below.

Completed Backups [↗](#)

Restore

Execute A

Name	Description	Backup Date ▼	Instance backed up on
------	-------------	---------------	-----------------------

3

Fill in the required fields:

1

Fill in the **Name** field with the desired name of the backup.

2

Within the **Select an application** section, choose the tables you want to backup. You can either pick tables manually from the **Tables** list or select an application which contains a set list of tables to backup.

NOTE: These application templates are tables available in the global scope.

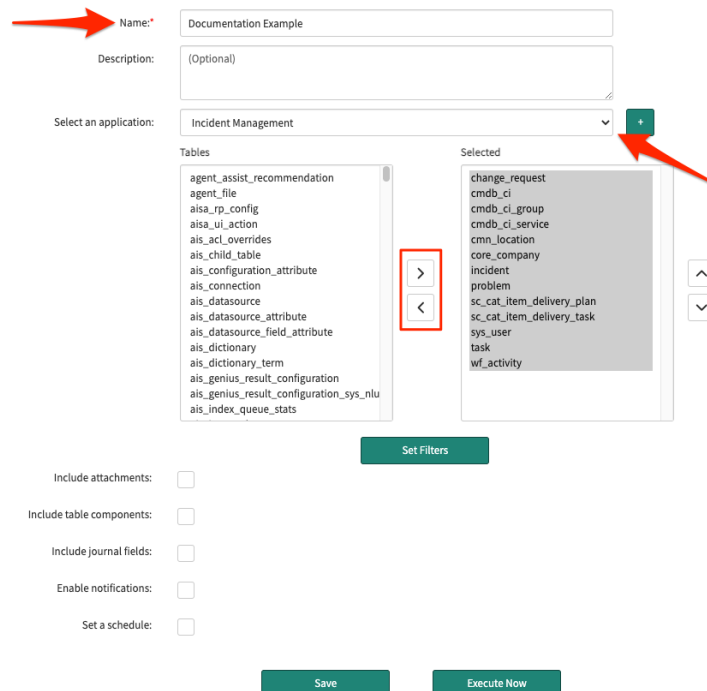
(Optionally) If you manually chose tables, you can save those selected tables as a custom application template with the + button next to the dropdown.

The following application templates are currently available:

Application	Tables
Incident Management	change_request cmdb_ci cmdb_ci_group cmdb_ci_service cmn_location core_company incident problem sc_cat_item_delivery_plan sc_cat_item_delivery_task sys_user task wf_activity

ITSM	change_task incident problem_task sysapproval_approver task_ci task_cmdb_ci_service task_sla
Catalog Tasks	cmdb_ci cmdb_ci_appl cmdb_ci_group cmdb_model core_company item_option_new pc_hardware_cat_item pc_software_cat_item sc_cat_item sc_cat_item_guide sc_category sc_req_item sc_request sc_task sys_plugins sys_user wf_activity wf_activity_definition wf_stage wf_workflow wf_workflow_version
Service Catalog	catalog_script_client catalog_ui_policy item_option_new item_option_new_set sc_cat_dt_app_group sc_cat_dt_app_user sc_cat_item sc_cat_item_category sc_cat_item_company_mtom sc_cat_item_company_no_mtom sc_cat_item_dept_mtom sc_cat_item_dept_no_mtom sc_cat_item_group_mtom sc_cat_item_group_no_mtom sc_cat_item_guide_items sc_cat_item_location_mtom sc_cat_item_location_no_mtom sc_cat_item_user_mtom sc_cat_item_user_no_mtom sc_category_location_no_mtom

← Create a Backup



Name: Documentation Example

Description: (Optional)

Select an application: Incident Management

Tables

agent_assist_recommendation
agent_file
aisa_rp_config
aisa_ui_action
ais_acl_overrides
ais_child_table
ais_configuration_attribute
ais_connection
ais_datasource
ais_datasource_attribute
ais_datasource_field_attribute
ais_dictionary
ais_dictionary_term
ais_genius_result_configuration
ais_genius_result_configuration_sys_nlu
ais_index_queue_stats

Selected

change_request
cmdb_ci
cmdb_ci_group
cmdb_ci_service
cmn_location
core_company
incident
problem
sc_cat_item_delivery_plan
sc_cat_item_delivery_task
sys_user
task
wf_activity

Set Filters

Include attachments: ☐

Include table components: ☐

Include journal fields: ☐

Enable notifications: ☐

Set a schedule: ☐

Save **Execute Now**

4

(Optional)


After selecting tables to backup, you have an option to apply conditions to tables that you want to back up. Without setting conditions, the entire tables will be backed up.

To apply conditions, click **Set Filters** below the **Tables** to set up your desired conditions.

← Create a Backup

Name:

Description:


Select an application: 

Tables

- agent_assist_recommendation
- agent_file
- aisa_rp_config
- aisa_ui_action
- aisa_acl_overrides
- ais_child_table
- ais_configuration_attribute
- ais_connection
- ais_datasource
- ais_datasource_attribute
- ais_datasource_field_attribute
- ais_dictionary
- ais_dictionary_term
- ais_genius_result_configuration
- ais_genius_result_configuration_sys_nlu
- ais_index_queue_stats

Selected

- change_request
- cmdb_ci
- cmdb_ci_group
- cmdb_ci_service
- cmn_location
- com_company
- incident
- problem
- sc_cat_item_delivery_plan
- sc_cat_item_delivery_task
- sys_user
- task
- wf_activity




Include attachments: ☐


Include table components: ☐

Include journal fields: ☐

Enable notifications: ☐

Set a schedule: ☐





Then, select the table you want to filter and set the conditions with the condition builder.

Set filters ✕

The dropdown contains the tables that you selected to backup. Select an option from the dropdown to start building filters.

Table:

All of these conditions must be met

Active

is

false

⊖

OR

AND

or

All of these conditions must be met

Created

on


2021-03-01

⊖

OR

AND

or



5

Enable backup on related tables:



1

To backup attachments (sys_attachment and sys_attachment_doc) for with the tables selected, enable **Include attachments**.

2

Enable **Include table components** to backup all the related components needed for the selected table(s). Selecting this option will only select records related to your select tables from the following system tables:

- Custom fields in the dictionary entry (sys_dictionary)
- Business rule (sys_script)
- Access control (sys_security_acl)
- UI action (sys_ui_action)
- List (sys_ui_list)
- List element (sys_ui_list_element)
- Module (sys_ui_module)
- Form section (sys_ui_section)

3

To backup journal field (sys_journal_field) records related to the tables selected, enable **Include journal fields**.

6

To enable notification for when backups are completed, check **Enable notifications**. Then, chose which users will receive the notifications or enter an email.

NOTE: Perspectium notifications are created as ServiceNow [email notifications](#) in order to send emails natively through the instance and notifications use [notification email scripts](#) for the email's subject and body content.

The Snapshot notification has the following format:


Subject: Perspectium DataSync Snapshot completed: <Backup Name>

Body: Finished backing up snapshot <Backup Name> for tables: <Comma Separated List of Tables by Label>

See [email notifications](#) and [notification email scripts](#) for more information.

include table components: ☐

Include journal fields: ☐


Enable notifications: ☒ 

All Users

- Cyril Bennett
- Damion Matkin
- Danette Fostervoid
- Daniel Zill
- Danny Dales
- Darrel Ruffins
- Darrel Tork
- Darrell Amrich
- Darren Merlin
- Darrin Neiss
- David Dan
- David Miller
- Davin Czukowski
- Davis Brevard
- Davis Heideman
- Deandre Resendiz
- Deanna Gerbi

User to Notify

David Loo

Email: 

Set a schedule: ☐

Save

Execute Now

7

Instead of executing the backup right away, you can set a up a scheduled back up by enabling **Set a schedule**. Once activated, you can choose when to run the schedule.

Include table components: ☐

Include journal fields: ☐

Enable notifications: ☐

Set a schedule: ☒

Run: Daily ▼

Time zone: -- None -- ▼

Time: Hours 00 00 00

Save Execute Now

8

After configuring all the required fields, click **Save**. This will save the backup for pending use later on.

If you did not set a schedule and want to execute the backup right away, click **Execute Now**.

Execute a pending backup

1

Log into your ServiceNow instance and navigate to **Perspectium > Snapshot > Snapshot**.

2

Under **Pending Backups**, select the backup you want to execute. Then, click **Edit**.



DataSync Snapshot

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[Perspectium Docs](#)

Backup Status

+ New Backup

There are currently no backups in progress. Press the "+ New Backup" button to create a new backup or choose a backup to restore below.

Pending Backups



Pending backups are backups that have yet to be executed. Select one below to edit the configuration, set up a schedule or execute the backup.

Name	Description	Created ▼
Documentation Example		2021-03-16 23:08:34

Completed Backups [↗](#)

Restore	Execute
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Name	Description	Backup Date ▼	Instance backed up on
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On the bottom of the page, click **Execute Now**.

3
4

(Optional) Navigate back to **Snapshot**. Under the **Backup Status** section, monitor the status of your backup.



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[Perspectium Docs](#)

Backup Status

+ New

Current status : In progress

Name : Documentation Example

Time started : 03-16-2021 04:10:29

Percent Completed : 7%

Completed Backups [↗](#)

Restore

Execute

Name	Description	Backup Date ▼	Instance backed up on
------	-------------	---------------	-----------------------



DataSync Snapshot

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[Perspectium Docs](#)

Backup Status

+ New Ba

Current status : Completed

Name : Documentation Example

Time started : 03-16-2021 04:10:29

Percent Completed : 100%

Completed Backups [↗](#)

Restore

Execute

Name	Description	Backup Date ▼ ^	Instance backed up on
------	-------------	-----------------	-----------------------

Restore a completed backup

WARNING: Restoring a backup will overwrite existing records.

1

Log into your ServiceNow instance and navigate to **Perspectium > Snapshot > Snapshot**.

2

Whether you are restoring in your own instance or another instance, select the completed backup you want to restore. Then, click **Restore**. You will be prompted to continue and click **Ok**.

NOTE: If you are restoring the table(s) in another instance, validate that you have the same Integration Mesh credentials. See [set up initial configurations for Snapshot](#).

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DataSync Snapshot

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[Perspectium Docs](#)

Backup Status


+ New

Current status : Completed

Name : Documentation Backup Example

Time started : 03-17-2021 12:36:05

Percent Completed : 100%

Completed Backups 

Restore

Exec

Name	Description	Backup Date	Instance backed up on
user test		03-16-2021 11:59:40	dev74801
Testing-property		03-09-2021 12:18:00	dev88712

Once restore is complete, your ServiceNow instance will start receiving inbound messages (**Perspectium > Messages > Inbound**) and the restored records in the selected table(s) will appear in your instance.

NOTE: Restoring a backup will **not** trigger any dynamic shares that are enabled on the table(s) being restored.

When to use Snapshot

How to configure Snapshot for different uses are listed below. These listed are just some examples of how you can use Snapshot and if you have any questions about how you can best use it, contact [Perspectium Support](#).

Upgrading a ServiceNow application

Learn how to setup and execute backup to prepare your ServiceNow instance for an upgrade.

Before you upgrade your application, you will need to back up the tables in your ServiceNow instance.

Create a backup

1

Log into your ServiceNow instance and navigate to **Perspectium > DataSync > Snapshot**.

2

Next click **+ New Backup**.



DataSync Snapshot

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[Perspectium Docs](#)

Backup Status



+ New Backup

There are currently no backups in progress. Press the "+ New Backup" button to create a new backup or choose a backup to restore below.

Completed Backups [↗](#)

Restore

Execute A

Name	Description	Backup Date ▼	Instance backed up on
------	-------------	---------------	-----------------------

3

Fill in all required fields:

1

Fill in the **Name** field with the desired name of the backup.

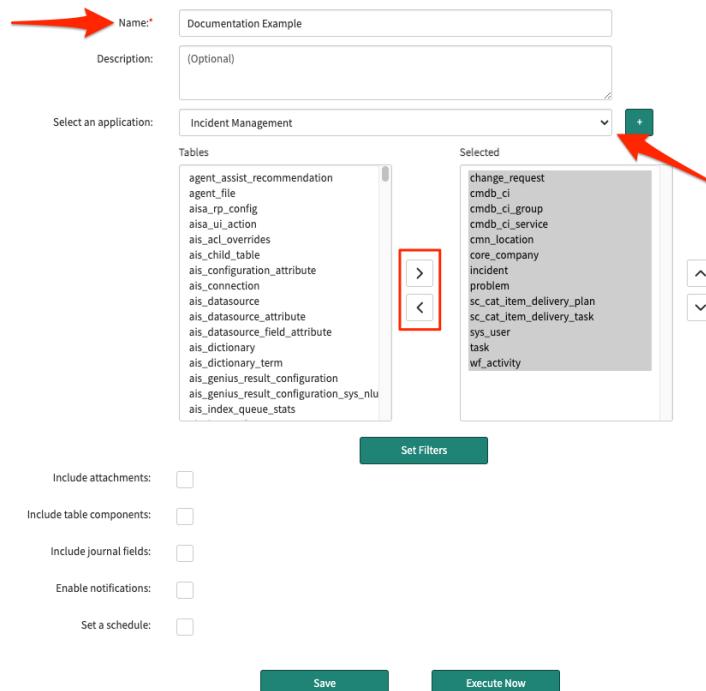
2

Within the **Select an application** section, choose the tables you want to backup. You can either pick tables manually from the **Tables** list or select an application which contains a set list of tables to backup.

NOTE: These application templates are tables available in the global scope.

(Optionally) If you manually chose tables, you can save those selected tables as a custom application template with the + button next to the dropdown.

← Create a Backup



Name:

Description:

Select an application: +

Tables

- agent_assist_recommendation
- agent_file
- aisa_rp_config
- aisa_ui_action
- ais_acl_overrides
- ais_child_table
- ais_configuration_attribute
- ais_connection
- ais_datasource
- ais_datasource_attribute
- ais_datasource_field_attribute
- ais_dictionary
- ais_dictionary_term
- ais_genius_result_configuration
- ais_genius_result_configuration_sys_nlu
- ais_index_queue_stats

Selected

- change_request
- cmdb_ci
- cmdb_ci_group
- cmdb_ci_service
- cmn_location
- core_company
- incident
- problem
- sc_cat_item_delivery_plan
- sc_cat_item_delivery_task
- sys_user
- task
- wf_activity

Set Filters

Include attachments: ☐

Include table components: ☐

Include journal fields: ☐

Enable notifications: ☐

Set a schedule: ☐

Save Execute Now

4

Enable **Include table components** to backup all the related components needed for the selected table(s). Selecting this option will only select records related to your select tables from the following system tables:


- Custom fields in the dictionary entry (sys_dictionary)
- Business rule (sys_script)
- Access control (sys_security_acl)
- UI action (sys_ui_action)
- List (sys_ui_list)
- List element (sys_ui_list_element)
- Module (sys_ui_module)
- Form section (sys_ui_section)

5

After configuring all the required fields, click **Execute Now**. This will start executing the backup immediately.

Once the tables are backed up, you can upgrade the application. Let's say something went wrong or the upgrade removed a core functionality, time to restore that backup!

Restore the completed backup

 **WARNING:** Restoring a backup will overwrite existing records.

1

Log into your ServiceNow instance and navigate to **Perspectium > Snapshot > Snapshot**.

2

Select the completed back up you want to restore. Then, click **Restore**. You will be prompted to continue and click **Ok**.

Once restore is complete, your ServiceNow instance will start receiving inbound messages (**Perspectium > Messages > Inbound**) and the restored records in the selected table(s) will appear in your instance.

Upgrading across different instances

Learn how to backup and restore table(s) when upgrading the application across different instances.

NOTE: Before you begin, validate that you have the same Integration Mesh credentials across the different instances.

In cases where you have two instances, i.e. one test environment and one development environment, and you want to upgrade the test environment, you can first execute a backup before doing the upgrade.

Create a backup in the test environment

1

Log into your ServiceNow instance and navigate to **Perspectium > DataSync > Snapshot**.

2

Next click **+ New Backup**.

3

Fill in the required fields:

1

Fill in the **Name** field with the desired name of the backup.

2

Within the **Select an application** section, choose the tables you want to backup. You can either pick tables manually from the **Tables** list or select an application which contains a set list of tables to backup.

NOTE: These application templates are tables available in the global scope.

(Optionally) If you manually chose tables, you can save those selected tables as a custom application template with the + button next to the dropdown.

4

After configuring all the required fields, click **Execute Now**. This will start executing the backup immediately.

Let's say you now wanted to upgrade the development environment as well. However during the upgrade, you run into issues because of conflicts with other applications on this instance. You can restore the backup from the test environment to the development environment.

Restore a completed backup

WARNING: Restoring a backup will overwrite existing records.

1

Log into your ServiceNow instance and navigate to **Perspectium > Snapshot > Snapshot**.

2

Select the completed back up you want to restore. Then, click **Restore**. You will be prompted to continue and click **Ok**.

Once restore is complete, your ServiceNow instance will start receiving inbound messages (**Perspectium > Messages > Inbound**) and the restored records in the selected table(s) will appear in your instance.

Backing up continuously changing environments

For instances where you are continuously making changes to, such as a development environment, you can schedule backups to automatically run on a repeated interval so you can restore at different points in time.

To schedule a backup on a repeated interval, do the following:

Set up a monthly backup

1

Log into your ServiceNow instance and navigate to **Perspectium > DataSync > Snapshot**.

2

Next click **+ New Backup**.



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[Perspectium Docs](#)

Backup Status



There are currently no backups in progress. Press the "+ New Backup" button to create a new backup or choose a backup to restore below.

Completed Backups

Restore

Execute A

Name	Description	Backup Date ▼	Instance backed up on
------	-------------	---------------	-----------------------

3

Fill in the required fields:

1

Fill in the **Name** field with the desired name of the backup.

2

Within the **Select an application** section, choose the tables you want to backup. You can either pick tables manually from the **Tables** list or select an application which contains a set list of tables to backup.

NOTE: These application templates are tables available in the global scope.

(Optionally) If you manually chose tables, you can save those selected tables as a custom application template with the + button next to the dropdown.



Create a Backup

Name: Documentation Example

Description: (Optional)

Select an application: Incident Management

Tables

- agent_assist_recommendation
- agent_file
- aisa_rp_config
- aisa_ui_action
- aisa_acl_overrides
- ais_child_table
- ais_configuration_attribute
- ais_connection
- ais_datasource
- ais_datasource_attribute
- ais_datasource_field_attribute
- ais_dictionary
- ais_dictionary_term
- ais_genius_result_configuration
- ais_genius_result_configuration_sys_nlu
- ais_index_queue_stats

Selected

- change_request
- cmdb_ci
- cmdb_ci_group
- cmdb_ci_service
- cmn_location
- core_company
- incident
- problem
- sc_cat_item_delivery_plan
- sc_cat_item_delivery_task
- sys_user
- task
- wf_activity

Set Filters

Include attachments: ☐

Include table components: ☐

Include journal fields: ☐

Enable notifications: ☐

Set a schedule: ☐

Save Execute Now

4

Enable backup on related tables:

1

To backup attachments (sys_attachment and sys_attachment_doc) for the tables selected, enable **Include attachments**.

2

Enable **Include table components** to backup all the related components needed for the selected table(s). Selecting this option will only select records related to your select tables from the following system tables:

- Custom fields in the dictionary entry (sys_dictionary)
- Business rule (sys_script)
- Access control (sys_security_acl)
- UI action (sys_ui_action)
- List (sys_ui_list)
- List element (sys_ui_list_element)
- Module (sys_ui_module)
- Form section (sys_ui_section)

3

To backup journal field (sys_journal_field) records related to the tables selected, enable **Include journal fields**.

5

Check **Set a schedule**.

Once activated, you can choose when to run the schedule in the **Run** dropdown. In this case we've chosen **Monthly** to have a backup executed every month from this point forward.

6

Click **Save**.

Once you experience an issue and you feel the need to restore previous table(s), you can restore one of your previously executed backups.

Restore the latest backup

⚠ WARNING: Restoring a backup will overwrite existing records.

1

Log into your ServiceNow instance and navigate to **Perspectium > Snapshot > Snapshot**.

2

Select the most recent backup, then click **Restore**. You will be prompted to continue and click **Ok**.

Once restore is complete, your ServiceNow instance will start receiving inbound messages (**Perspectium > Messages > Inbound**) and the restored records in the selected table(s) will appear in your instance.