

Install and Configure DataSync for ServiceNow

Getting set up with DataSync for ServiceNow involves several stages, all of which are outlined here. This page includes the steps necessary for getting started, but also some additional (optional) configurations as well. Use the table of contents to browse all topics on this page.

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Confirm ServiceNow Compatibility

All Perspectium applications delivered through update sets are continuously updated and rigorously tested to ensure support for the latest versions of the ServiceNow platform. Check to make sure your current version is supported:

- Washington DC (verified as of April 28, 2024)
- Vancouver
- Utah
- Tokyo
- San Diego
- Rome
- Quebec
- Paris
- Orlando
- New York
- Madrid
- London



Some legacy upgrades require additional direction - click to visit for more information:

- [Kingston upgrade](#)
- [London upgrade](#)

Perspectium tests **n-2** compatibility of its application with each new release of ServiceNow e.g. the current version of the Perspectium app and the previous two major releases prior to this release are tested with the newest version of the ServiceNow application after its general availability (GA) release date. Once we have completed testing, we will update the documentation here to reflect compatibility and any known issues.

For more information about the latest ServiceNow versions and the features supported for those versions, see [ServiceNow versions](#).



If upgrading your ServiceNow instance with a Perspectium app installed, be sure to stop all jobs **Perspectium > Control and Configuration > Start / Stop All Jobs**) before your upgrade, and then start them again once your upgrade is complete. This is to ensure you don't lose any record sharing while your instance is upgrading. For instructions on this and more information, see [Start/Stop All Jobs](#).

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Request download link from Perspectium

Once you've confirmed ServiceNow compatibility, the first step in setting up the Perspectium application is to reach out to support@perspectium.com and request the download link for the current version of Perspectium. You will be sent a file in a zipped format representing an **exported update set** XML file. Save the file in your browser's designated **Downloads** folder. After saving the downloaded zip file, unzip it using your preferred method.

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Install DataSync for ServiceNow

To enable the syncing of data from your ServiceNow instance to other Perspectium-supported endpoints, you will first need to install the Perspectium application (DataSync for ServiceNow). The installation process involves first previewing and then committing Perspectium update sets in your ServiceNow instance.



The DataSync application will install [custom tables](#) into your ServiceNow instance. Consult with ServiceNow if you have any questions about your [custom table licensing](#).



The Perspectium application must be installed in the **global** scope to function properly. If the application is installed in a different application scope, it will not have access to certain built-in ServiceNow functions (such as serializing and encrypting GlideRecords) to share out data.

To install the Perspectium application:

1. Log into your ServiceNow instance and navigate to **System Update Sets > Retrieved Update Sets** or simply type **Retrieved Update Sets** in the Filter Navigator on the upper left side of the screen.
2. In the resulting form, click **Import Update Set from XML** under the **Related Links** section.
3. Upload the Perspectium for ServiceNow update set (.xml file) provided by [Perspectium Support](#) (as previously mentioned, you need to request this file) and click **Upload**.
4. Click the name of the update set you uploaded in Step 3.
5. In the resulting form, click **Preview Update Set** in the top right corner, and close the pop-up after it finishes running.
6. 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.

We recommend that you check the box next to each error or warning and choose the **Accept remote update** option. If you have made changes or customizations you have made to Perspectium components (not typical), then select **Skip remote update** for those updates.

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](#).

7. Once you have addressed any errors or warnings, click **Commit Update Set** in the top right corner of the form, and close the pop-up after it finishes running.



The application installs a **role** called **perspectium** that has access to the Perspectium application's tables. This role can be used to limit ServiceNow users to only have access to the Perspectium application and can be given to a user used with the [DataSync Agent](#) to access ServiceNow table schemas in order to replicate accurately and dynamically to external databases. If you want to assign a user a read only access to the Perspectium application, a **perspectium_readonly** is also available.

See [Assign user a role in ServiceNow](#) to add the **perspectium** or **perspectium_readonly** role to specific user.

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Upgrade your Perspectium Application

To ensure that you're up-to-date on all of the latest features and enhancements for DataSync, you can upgrade your DataSync for ServiceNow installation whenever new releases are available. To check which version of DataSync for ServiceNow you have installed on your instance, navigate to **Perspectium > Control and Configuration > Properties** and locate your current version listed under **Perspectium Update Set Version**.

To upgrade your Perspectium application:

1. Log into any ServiceNow instances that have Perspectium update sets committed to them, and click **Perspectium > Control and Configuration > Start / Stop All Jobs** to stop running all Perspectium jobs on each instance.
2. Navigate to **System Update Sets > Retrieved Update Sets** or use the Filter Navigator in the top left side of the screen and type **Retrieved Update Sets**.

3. In the resulting form, click **Import Update Set from XML** under the **Related Links** section.
4. Upload the update set (.xml file) provided by [Perspectium Support](#) and click **Upload**.
5. Click the name of the update set you uploaded in Step 4.
6. In the top right corner of the resulting form, click **Preview Update Set** and close the pop-up after it finishes running.
7. 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](#).
8. Once you have addressed any errors or warnings, click **Commit Update Set** in the top right corner of the form, and close the pop-up after it finishes running.

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Run Perspectium Finish Install Scripts

Starting with Helium 6.1.0 version of the Core application, running **Finish Install** after installing a Perspectium update set will no longer be required.

After committing any Perspectium update sets to your ServiceNow instance (whether for the first time, or for an upgrade), the **Finish Install** scripts must be run in order for your Perspectium applications to function correctly. Finish Install will check if the Perspectium application is in the global scope, run jobs to install properties for the application, start running scheduled jobs, and reset dynamic share rules. By running the Finish Install script, you will not overwrite your current Perspectium properties.

You must run the Finish Install script whether you are installing the Perspectium application for the first time or upgrading your Perspectium application version. The Finish Install scripts can also be run after committing multiple Perspectium update sets for ServiceNow.

To run the Finish Install scripts:

1. Log into your ServiceNow instance and navigate to **Perspectium > Control and Configuration > Finish Install**
2. At the bottom of the form, click **Confirm**



Finish Install

Clicking Confirm below will complete your installation of the Perspectium Update Sets for this instance.

What will be done:

- Perspectium Properties will be initialized.
- Validation tests will run.
- Perspectium Jobs will start running.
- A weekly troubleshooting report sent to Perspectium Support will be enabled. Perspectium uses this report to help diagnose and troubleshoot issues when you create tickets in the Perspectium Support Portal. No company data or security information will be shared. For more information, see [Troubleshooting Report](#).

When to run Finish Install:

- Run as a final step after committing multiple Perspectium Update Sets.
- Run as a final step for first-time installation and for any Perspectium Update Set version upgrades.

Executing Finish Install is not required for Helium 6.1.0 and newer.

Confirm



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Set Initial Perspectium Properties in ServiceNow

After installing the Perspectium application (or upgrading to a newer version), and running Perspectium Finish Install scripts, you will need to set your initial Perspectium properties.



Before getting started, make sure you have the following information (if not, contact [Perspectium Support](#))

- Perspectium Integration Mesh (MBS) server URL, username, and password

To set your initial Perspectium and DataSync properties:

1. Log into your ServiceNow instance and navigate to **Perspectium > Control and Configuration > Properties** or use the Filter Navigator in the top left side of the screen and type **Control and Configuration**, then click **Properties**.
2. On the **Properties** page, click **General Settings**.
3. In the resulting form, fill out the fields with your Perspectium Integration Mesh username, password, and server URL, and click **Save**.

NOTE: We highly recommend that you check the **Enable debugging to generate more logs** box. To view your Perspectium logs, navigate to **Perspectium > Control and Configuration > Logs**.

4. Click the back arrow to go back to the **Properties** page, and this time click **DataSync Settings**
5. In the resulting form, fill out the fields with your encryption and/or decryption keys (see NOTES for more information)
6. Scroll to the bottom of the page and click **Save**.



NOTES

- Your encryption key will encrypt data that is shared out of your ServiceNow instance, while your decryption key will decrypt any subscribed data coming into your ServiceNow instance.
- Your encryption/decryption key must be 24+ characters in length to enable **TripleDES** or **AES-128** encryption.
- To enable **AES-256** encryption, your encryption key must be 32+ characters.
- You can select an encryption cipher when you [create a dynamic share](#) or [create a bulk share](#).
- The encryption/decryption keys set in Replicator properties are your default keys. To set encryption/decryption keys for each shared queue, see [create a ServiceNow shared queue](#). For more information about creating multiple encryption/decryption keys, see [encryption keys between instances](#).
- When changing the encryption key in the shared / subscribe queue or properties, remove the preexisting key and add the new key.
- You can also configure how data is encrypted before being shared by choosing an option from the dropdown under **Decryption key**. By default, data shared out of your instance will use ServiceNow's password encryption (**encrypted**), but you can also choose to base64 encode shared data and then use ServiceNow's password encryption (**encrypted_multibyte**).

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What's next?

The Perspectium application is comprised of various modules—explore how to navigate these modules and use available features that may be helpful to you.