



# Record Estimator

App Installation and User Guide

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# Overview

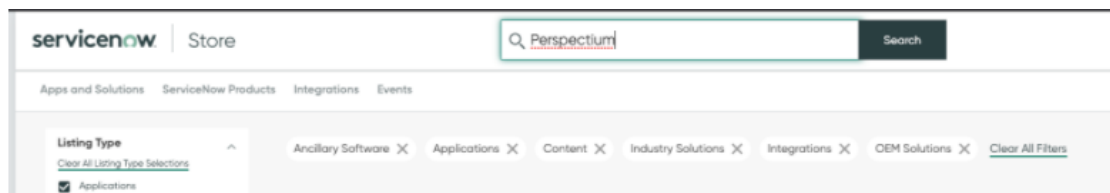
The Perspectium Record Estimator application allows you to understand and manage the growth of your ServiceNow instance. Use Record Estimator to understand the number of records in any table in your instance, get visibility into table growth over time, and set up alerts to notify you when records approach a threshold.

## Set Up Initial Configurations for Record Estimator

### Record Estimator Initial Set Up

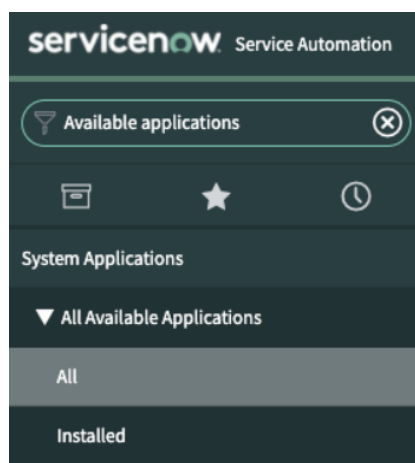
To set up the initial configurations after [installing](#) the Record Estimator app into your instance, follow these steps:

- 1 **Download the Record Estimator app from the ServiceNow store.**  
Go to <https://store.servicenow.com> and search for Perspectium:



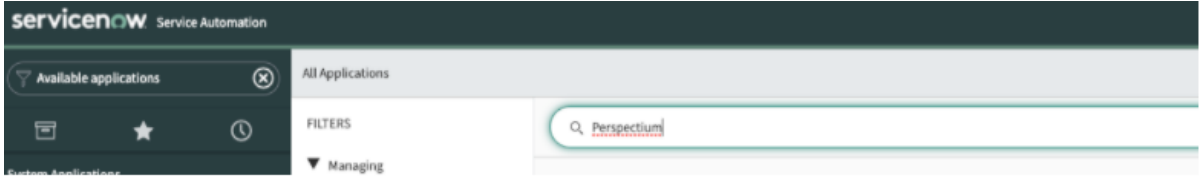
Click on the Perspectium Record Estimator app and choose Buy. You will then be prompted to login with your HI credentials and purchase a license and entitlement to the app.

- 2 **Go to your ServiceNow instance to start the installation.**  
Shortly after the app has been entitled for your instance, go to your instance and then in the Filter Navigator of the [Application Navigator](#), type in **Available applications** to navigate to System Applications > All Available Applications > All.



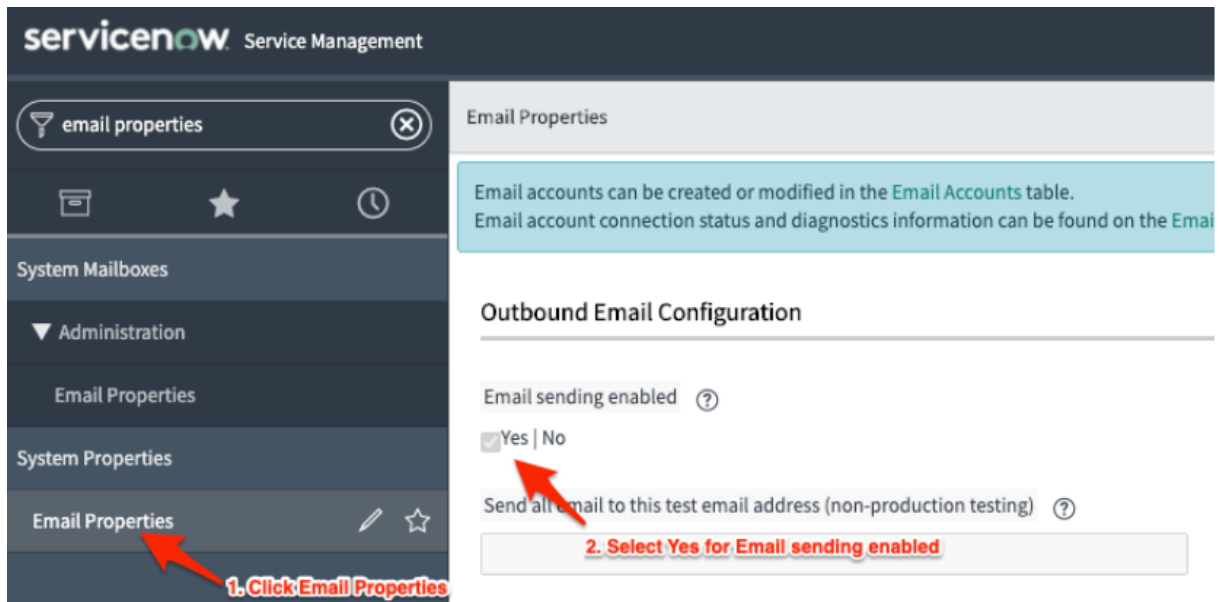
## Record Estimator Initial Set Up (continued)

- 3 Install the Record Estimator into your ServiceNow instance.**  
Search for the application by typing in **Perspectium** in the search bar.



The Record Estimator app should appear in the list with an **Install** button to the right. Click on the button and wait for it to finish installing.

- 4 Enable outbound notifications (optional).**  
In order for the Record Estimator app to send you email notifications for alerts the app creates, [email sending](#) by the outgoing mail server must be enabled.

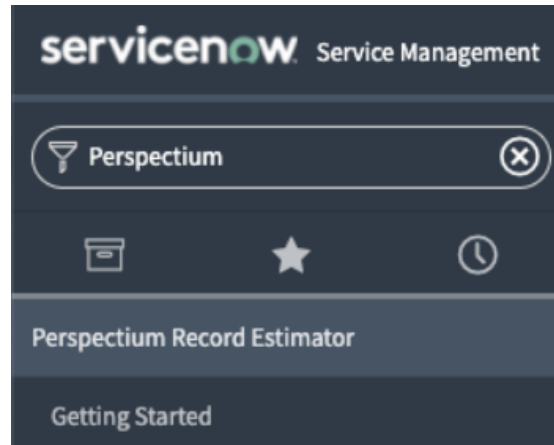


To enable this feature, go to **System Properties > Email Properties** and then select **Yes** for the **Email sending enabled** property.

Note: this property is a global system property that applies to your entire instance. This feature is only required if you want to use the alerts feature of the application to send notifications.

## Record Estimator Initial Set Up (continued)

- 5** **Navigate to the Perspectium Record Estimator application.**  
You are now ready to start using the Record Estimator app! In the Filter Navigator of the [Application Navigator](#), type in Perspectium to find the Perspectium Record Estimator application:



- 6** **Get started on using the application.**  
Click on the **Getting Started** module under Perspectium Record Estimator to learn more about the app and get started using it.

Go on to the next section to learn about some of the main features of Record Estimator and how to use them!

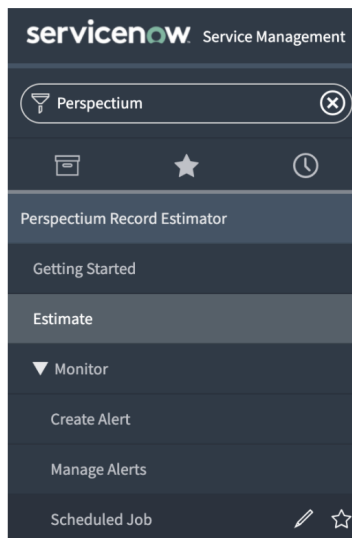
# User Guide

## Estimate Tables in Your Instance

The Estimate module allows users to evaluate one or more tables and estimate how the table records grow over time. Users have the option to group records in a table by a selected field, and include conditions that filter the table's records by string encoded queries. Optionally, start and end dates can be specified to only report on records created between specific start and end dates.

To start using Record Estimate, follow these steps:

- 1 Navigate to **Perspectium Record Estimator > Estimate**.



- 2 Select a table you want to estimate in the **Table** dropdown.  
**Note:** System tables (tables prefixed with **sys**) are not included for selection unless the table is listed in the **glide.ui.permitted\_tables** global properties.

A screenshot of the Perspectium Estimate form. The form has a title 'Estimate' and a subtitle 'Estimate the number of records in a table and see their growth over time'. It contains three main input fields: 'Table' (with a dropdown menu showing 'Incident (incident)'), 'Group By' (with a dropdown menu showing '--None--'), and 'Conditions' (with a text input field). Below these fields is a warning message: 'Running an estimate report against tables with large volumes of records may impact performance'. There are 'Add Row' and 'Delete Last Row' buttons. At the bottom, there is a 'Creation Date Range (Optional)' section with 'FROM' and 'TO' date pickers, and a 'Run' button. A red arrow points to the 'Table' dropdown with the text 'Select the table you want to estimate'.

## Record Estimate Tables in Your Instance (continued)

- 3 (Optional) Group the table by selecting a field in the **Group by** dropdown.  
**Note:** Group by function will be disabled if the user does not have access to the `personalize_dictionary` role

- 4 (Optional) Enter a string encoded query in the **Conditions** field, e.g. `active=true`.

The screenshot shows the Perspectium Estimate interface. At the top, the Perspectium logo and the word "Estimate" are displayed. Below this, a subtitle reads "Estimate the number of records in a table and see their growth over time" followed by the optional instruction "(Optional) Fill in a string encoded query".

The main configuration area consists of three dropdown menus: "Table", "Group By", and "Conditions". The "Table" dropdown is set to "Incident (incident)", the "Group By" dropdown is set to "Sys ID", and the "Conditions" field contains the text "active=true".

Below the dropdowns, there is a warning message: "Running an estimate report against tables with large volumes of records may impact performance". To the right of this message are two buttons: "Add Row" and "Delete Last Row".

At the bottom left, there is a "Creation Date Range (Optional)" section with "FROM" and "TO" input fields. At the bottom center is a "Run" button.

Red arrows point to the "Group By" dropdown and the "Conditions" field, with the following annotations: "(Optional) Group the table by selecting a field" and "(Optional) Fill in a string encoded query".

- 5 Click **Add Row** to include more tables.

This screenshot is identical to the one above, showing the Perspectium Estimate interface with the same configuration: "Table" set to "Incident (incident)", "Group By" set to "Sys ID", and "Conditions" set to "active=true".

Red arrows point to the "Group By" dropdown and the "Conditions" field, with the following annotations: "(Optional) Group the table by selecting a field" and "(Optional) Fill in a string encoded query".

## Record Estimate Tables in Your Instance (continued)

- 6** (Optional) Select the range of the creation date to estimate records created between specified start and end dates in the **Creation Date Range**. If no start date is entered, then records will be fetched from when the table was first created. If no end date is entered, then the current date is used as the ending date. If no start date and no end date are entered, then all records are fetched.

The screenshot shows the 'Estimate' form in the Perspectium interface. The form includes fields for 'Table' (set to 'Incident (incident)'), 'Group By' (set to 'Sys ID'), and 'Conditions' (set to 'active=true'). Below these is a 'Creation Date Range (Optional)' section with two date pickers: '2020-07-01 10:57:44' and '2020-07-31 10:57:59'. A red box highlights this section. A red arrow points to the 'Run' button with the text '(Optional) Select a start date and end date to report records created between the start and end date'. A warning message states: 'Running an estimate report against tables with large volumes of records may impact performance'. There are also 'Add Row' and 'Delete Last Row' buttons.

- 7** Click **Run** to generate the report.

This screenshot is identical to the previous one, but with a red arrow pointing to the 'Run' button and the text 'Click Run to generate the report'.

Then, a **Results** results section will appear where you can see the number of records and updates per table.

The screenshot shows the 'Estimate' form with the 'Run' button clicked. Below the form, a 'Results' section is displayed, showing a list of records and updates for the 'Incident' table. The results are as follows:

Record ID	Updates
incident [sys_id = a9a16740c6112278000e9e90950785ca3]	1 records; 0 updates.
incident [sys_id = a9e30c766611227801189946b7c0795c]	1 records; 4 updates.
incident [sys_id = d71588a0c0a8016700e0f6c8d1f8661]	1 records; 5 updates.
incident [sys_id = d7125130c0a801670096a4491cd484]	1 records; 34 updates.
incident [sys_id = d712a3b4c0a801670096a4491cd484]	1 records; 32 updates.
incident [sys_id = d717f935c0a8016700802b64c67c11c5]	1 records; 10 updates.
incident [sys_id = a422540a0a0b5700050b8795747812]	1 records; 37 updates.
incident [sys_id = a4626d60a0a0b5700c7789387a6a5]	1 records; 5 updates.

Total: 8 records 193 updates

A 'View Growth Report' button is located at the bottom of the results section.



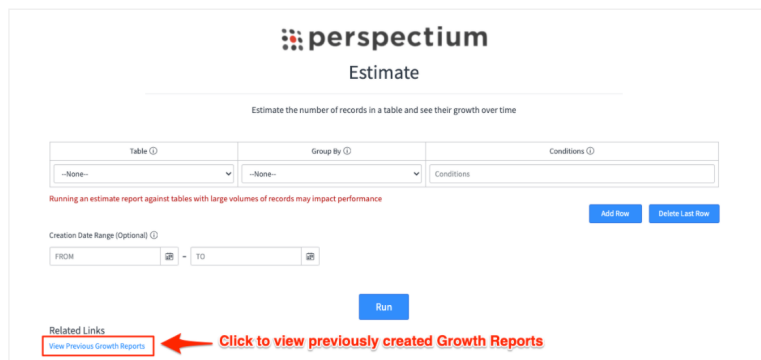
# Growth Report

Growth Report displays a visual representation of previously generated Estimate to show how table record counts grew over time. Users will have the option to select previous reports, as well as customize how the reports are shown.

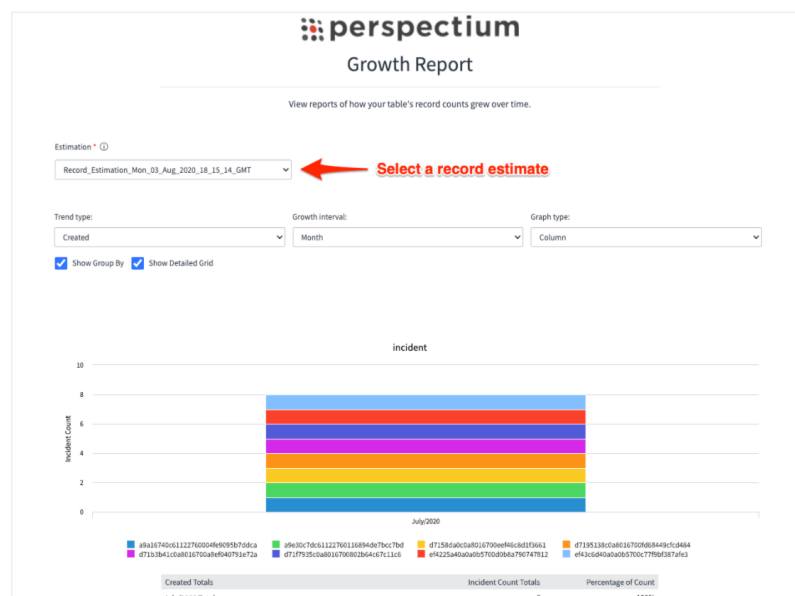
To see your Growth Report, follow these steps:

- 1 After you click **View Growth Report** from the **Estimate** module, you will automatically be redirected to the **Growth Report** module.

**Note:** A **View Previous Growth Report** related link will appear in the **Estimate** module if there are previously created Growth Reports. You can navigate to this by navigating to **Perspectium Record Estimator > Estimate**. Then, under the **Related Links**, click **View Previous Growth Report**.



- 2 Select a previously generated record estimate in the **Growth Report** dropdown.



# Growth Report (continued)

3

Select how you want to see your report by selecting the **Trend type**, **Growth Interval** and **Graph Type**. Additionally, enable **Show Group By** if you grouped the tables in the record estimate report you selected in the **Growth Report** dropdown. You can also enable **Show Detailed Grid** to include a data grid to the report.

4

Click **Create Alert** to enable an alert for the selected report. This will redirect you to the **Alert** module.

Created Totals	Incident Count Totals	Percentage of Count
July 2020 Total	8	100%
Created	Sys ID	Incident Count
	a9a16740c6112276004e9095b7ddca	1
	a9e30c7dc61122760116894d67b0c7bd	1
	d7158da0c0a8016700eef46cd1f3661	1
	d7195138ca801670068449cfd484	1
	d71b3b41c0a8016700a8e040791e72a	1
	d71f7935c0a8016700802b64c67c11c6	1
	e4422540a0a0b5700d0b8a790747812	1
	e43c6d40a0a0b5700c779bf587afe3	1
<b>Total</b>	<b>8</b>	<b>100%</b>

Incident [sys\_id = a9a16740c6112276004e9095b7ddca]: 1 records; 6 updates.  
 Incident [sys\_id = a9e30c7dc61122760116894d67b0c7bd]: 1 records; 4 updates.  
 Incident [sys\_id = d7158da0c0a8016700eef46cd1f3661]: 1 records; 5 updates.  
 Incident [sys\_id = d7195138ca801670068449cfd484]: 1 records; 94 updates.  
 Incident [sys\_id = d71b3b41c0a8016700a8e040791e72a]: 1 records; 32 updates.  
 Incident [sys\_id = d71f7935c0a8016700802b64c67c11c6]: 1 records; 10 updates.  
 Incident [sys\_id = e4422540a0a0b5700d0b8a790747812]: 1 records; 37 updates.  
 Incident [sys\_id = e43c6d40a0a0b5700c779bf587afe3]: 1 records; 5 updates.

Total: 8 records 193 updates

**Click Create Alert to enable an alert**

Create Alert

# Monitor

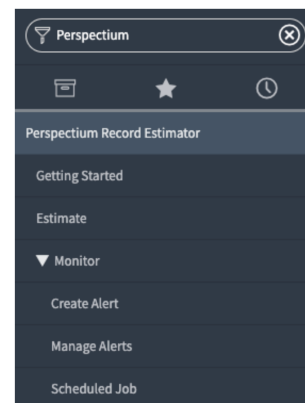
The Monitor module allows users to generate notifications for table record counts exceeding a defined threshold. Users have the option to create, manage, and schedule alerts.

## Create Alert

Users can create alerts to get notifications when the table record count exceeds the specified threshold, and select which available users will receive the email notification. Optionally, users can specify a condition with a string encoded query.

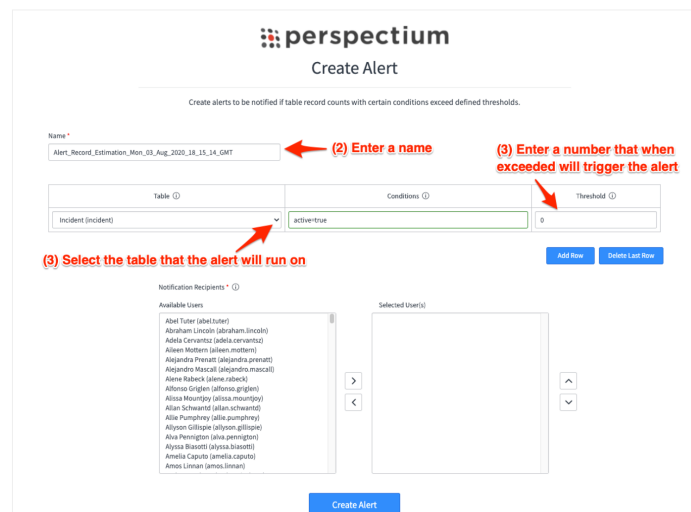
**Note:** Alerts can also be created through the **Growth Report** module by clicking **Create Alert**. The fields will automatically be populated.

- 1 Navigate to **Perspectium Record Estimator > Monitor > Create Alert**.



- 2 Enter a name in the **Name** field.

- 3 Select the table you want the alert to run on in the **Table** field, and enter a number in the **Threshold** field that when exceeded, will trigger the alert.



## Create Alert (Continued)

- 4 (Optional) Enter a string encoded query in the **Conditions** field, e.g. active=true.

**perspectium**  
Create Alert

Create alerts to be notified if table record counts with certain conditions exceed defined thresholds.

Name \*  
Alert\_Record\_Estimation\_Mon\_03\_Aug\_2020\_18\_15\_14\_GMT

Table	Conditions	Threshold
Incident (incident)	active=true	0

**(Optional) Enter a string encoded query**

Add Row Delete Last Row

Notification Recipients \*

Available Users

- Abel Tuter (abel.tuter)
- Abraham Lincoln (abraham.lincoln)
- Adela Cervantsz (adela.cervantsz)
- Aileen Mottern (aileen.mottern)
- Alejandra Prenatt (alejandra.prenatt)
- Alejandro Mascall (alejandro.mascall)
- Alene Rabeck (alene.rabeck)
- Alfonso Griglen (alfonso.griglen)
- Alissa Mountjoy (alissa.mountjoy)
- Allan Schwandt (allan.schwandt)
- Allie Pumhrey (allie.pumhrey)
- Alyson Gillispie (alyson.gillispie)
- Alva Penington (alva.penington)
- Alyssa Biasotti (alyssa.biasotti)
- Amelia Caputo (amelia.caputo)
- Amos Linnan (amos.linnan)

Selected User(s)

Create Alert

- 5 Click **Add Row** to include more tables.

**perspectium**  
Create Alert

Create alerts to be notified if table record counts with certain conditions exceed defined thresholds.

Name \*  
Alert\_Record\_Estimation\_Mon\_03\_Aug\_2020\_18\_15\_14\_GMT

Table	Conditions	Threshold
Incident (incident)	active=true	0
--None--	Conditions	0
--None--	Conditions	0

Click Add Row to add more tables

Add Row Delete Last Row

Click Delete Row to remove the most recent table

Notification Recipients \*

Available Users

- Abel Tuter (abel.tuter)
- Abraham Lincoln (abraham.lincoln)
- Adela Cervantsz (adela.cervantsz)
- Aileen Mottern (aileen.mottern)
- Alejandra Prenatt (alejandra.prenatt)
- Alejandro Mascall (alejandro.mascall)
- Alene Rabeck (alene.rabeck)
- Alfonso Griglen (alfonso.griglen)
- Alissa Mountjoy (alissa.mountjoy)
- Allan Schwandt (allan.schwandt)
- Allie Pumohrev (allie.pumohrev)

## Create Alert (Continued)

6

Select user(s) that will receive the email notification after an alert is triggered with the **Notification Recipients** list collector. Choose a user from the **Available Users** list and click the right arrow to transfer the user to the **Selected User(s)** list.

Create alerts to be notified if table record counts with certain conditions exceed defined thresholds.

Name \*

Alert\_Record\_Estimation\_Mon\_03\_Aug\_2020\_18\_15\_14\_GMT

Table	Conditions	Threshold
Incident (incident)	active=true	0

Add Row Delete Last Row

Notification Recipients \*

Available Users

- Aileen Mottern (aileen.mottern)
- Alejandra Prenatt (alejandra.prenatt)
- Alejandro Mascall (alejandro.mascall)
- Alene Rabeck (alene.rabeck)
- Allonso Griglen (allonso.griglen)
- Alyssa Mountjoy (alyssa.mountjoy)
- Allan Schwandt (allan.schwandt)
- Allie Pumpfrey (allie.pumpfrey)
- Allyson Gillispie (allyson.gillispie)
- Alva Pennigton (alva.pennigton)
- Alyssa Biasotti (alyssa.biasotti)
- Amelia Caputo (amelia.caputo)
- Amos Linnan (amos.linnan)
- Andrew Jackson (andrew.jackson)
- Andrew Och (andrew.och)
- Angelique Schermerhorn (angelique.schermerhorn)

Selected User(s)

- Abel Tuter (abel.tuter)
- Abraham Lincoln (abraham.lincoln)
- Adela Cervantsz (adela.cervantsz)

Create Alert

Select users from the Available Users list to transfer the user over to the Selected User(s) list

7

Click **Create Alert** to create the alert notification.

Create alerts to be notified if table record counts with certain conditions exceed defined thresholds.

Name \*

Alert\_Record\_Estimation\_Mon\_03\_Aug\_2020\_18\_15\_14\_GMT

Table	Conditions	Threshold
Incident (incident)	active=true	0

Add Row Delete Last Row

Notification Recipients \*

Available Users

- Aileen Mottern (aileen.mottern)
- Alejandra Prenatt (alejandra.prenatt)
- Alejandro Mascall (alejandro.mascall)
- Alene Rabeck (alene.rabeck)
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- Alyssa Biasotti (alyssa.biasotti)
- Amelia Caputo (amelia.caputo)
- Amos Linnan (amos.linnan)
- Andrew Jackson (andrew.jackson)
- Andrew Och (andrew.och)
- Angelique Schermerhorn (angelique.schermerhorn)

Selected User(s)

- Abel Tuter (abel.tuter)
- Abraham Lincoln (abraham.lincoln)
- Adela Cervantsz (adela.cervantsz)

Create Alert

Click to create the alert notification

## Manage Alerts

Users can manage previous alerts through the **Manage Alerts** module. They can select a previously created record alert and add more recipients that will receive the email notification if needed. The alert can also be activated or deactivated through this module. You can navigate to **Manage Alerts** by going to **Perspectium Record Estimator > Monitor > Manage Alerts**.

## Scheduled Job

Users can modify how often the alerts will run through the **Scheduled Job** module. When navigating to this module, the **Perspectium Check Alerts** scheduled job will appear. Users can change when to run the job with the **Run** dropdown. By default, the job will run every 30 minutes. You can navigate to **Scheduled Job** by going to **Perspectium Record Estimator > Monitor > Scheduled Job**.

**Note:** The **admin** role is required in order to view and modify the **Scheduled Alert** module and the associated **Perspectium Check Alerts** scheduled job. If the user does not have the **admin** role, the **Scheduled Job** module will not be displayed.

## Resources

### Documentation

Documentation on the Perspectium Record Estimator Application and its features can be found on the [Perspectium docs site](#).

### Additional Support

For additional support with Record Estimator, you can post an inquiry on [Perspectium's Community Forum](#) or contact the [Perspectium Support team](#).