



Generic Timeline Demo Component

Post Installation Guide

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Generic Timeline Demo Component – Introduction

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This document describes post installation steps to follow in order to use the “Generic Timeline” demo component.

The “Generic Timeline” demo component offers a way to display on a parent record page, a “visual timeline” of related child records. It requires:

1. A “Parent Object” with at least 4 custom fields:

- ✓ “Start Date”: date field
- ✓ “End Date”: date field
- ✓ “Child Records Count (#)”: roll-up summary field that counts the number of child records related to a parent record
- ✓ “Child Records Last Modified Date”: roll-up summary field that stores the last modified date of child records related to a parent record



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2. A “Child Object” with at least 2 custom fields:

- ✓ “Estimated Start Date”: date field
- ✓ “Real Start Date”: date field

Optional custom fields are:

- ✓ “Estimated End Date”: date field
- ✓ “Real End Date”: date field
- ✓ “Field to Display on the timeline”: if you want to display something else than the standard “Name” field

3. Process Builder that generates “Refresh Timeline Events” (*use of Platform Events*) when child records are added, modified or removed.

Please note that this component is based on the “visjs timeline” javascript library:

<http://visjs.org/docs/timeline>

The Salesforce logo, which is a blue cloud-like shape with the word "salesforce" written in white inside it.

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Here is an example of how this “Generic Timeline” demo component looks like:

The screenshot shows the Generic Timeline Demo Component interface. At the top, there is a header with the title "Generic Timeline Demo Component" and a toolbar with buttons for "+ Follow", "Edit", "Change Owner", "Delete", and a dropdown. Below the header is a timeline visualization for the months of September, October, and November 2017. The timeline features several colored boxes representing milestones: a green box for "Création Etude" on September 26, a red box for "Début technique de l'étude" on October 1, an orange box for "KOM" on October 6, a blue box for "QR Client" on October 11, a blue box for "Résultats Labo" on October 16, and a blue box for "Envoi Rapport technique provisoire validé" on November 1. A red vertical line connects the milestones from October 1 to October 6. Below the timeline, there are three main sections: "DETAILS", "PLANNING & LIVRABLES", and "MORE". The "PLANNING & LIVRABLES" section is currently active, showing a table titled "Etude Milestones (6+)" with columns for "ETUDE MILE...", "MILESTONE NA...", "ESTIMATED DATE", and "REAL DATE". The table contains the following data:

ETUDE MILE...	MILESTONE NA...	ESTIMATED DATE	REAL DATE
EM00117	Création Etude	27/09/2017	
EM00118	KOM	04/10/2017	05/10/2017
EM00123	Début techniq...	09/10/2017	
EM00124	QR Client	17/10/2017	
EM00125	Résultats Labo	24/10/2017	

The "ACTIVITY" section on the right contains buttons for "Log a Call", "Email", "New Task", and "More". It also includes a "Recap your call..." input field and an "Add" button. Below this is an "Activity Timeline" section with a "Filter" button, a "C" button, and an "Expand All" button. The "Next Steps" section at the bottom states: "No next steps. To get things moving, add a task or set up a".

Annotations with blue boxes and arrows point to specific elements:

- "Parent Object 'Start Date'" points to the start of the timeline on September 6.
- "Child Object 'Estimated Start Date'" points to the "Estimated Date" column in the "Etude Milestones" table.
- "Child Object 'Field to Display'" points to the "Résultats Labo" milestone box.
- "Parent Object 'End Date'" points to the end of the timeline on November 2.
- "Child Object 'Real Start Date'" points to the "Real Date" column in the "Etude Milestones" table.

Generic Timeline Demo Component – Post Installation Step 1

Add and configure the “Generic Timeline” demo component on your “Parent Record” page

The screenshot shows the Lightning App Builder interface with the following components:

- Left Sidebar:** Shows the "Lightning Components" section with a search bar and a list of components, including "Custom (15)" which contains the "Generic Time Line Component". A blue box labeled "1. Drag & Drop the component" has an arrow pointing to this item.
- Central Area:** The "Etude Record Page" is displayed. It shows the "Generic Timeline Demo Component" with a timeline from September to November 2017. Milestones include "Création Etude", "KOM", "QR Client", "Résultats Labo", and "Fin technique de l'étude". A blue box labeled "2. Configure the component" has an arrow pointing to the configuration panel on the right.
- Right Panel:** The "Generic Time Line Component" configuration page. It includes fields for "Parent Object Name" (Etude__c), "Parent Object - Start Date Field" (Start_Date__c), "Parent Object - End Date Field" (End_Date__c), "Child Object Name" (Etude_Milestone__c), "Child Object - Field to display on the timeline" (Milestone_Name_Picklist__c), "Child Object - Lookup Field with Parent Obj" (Etude__c), and "Child Object - Estimated Start Date Field". A blue box labeled "2. Configure the component" also points to this panel.

Bottom Right: A "salesforce" cloud icon with the number "6" next to it.

Generic Timeline Demo Component – Post Installation Step 2

Add “Child Records Count (#)” and “Child Records Last Modified Date” roll-up custom fields on your “Parent Object”

Etude Custom Field
Child Records #
[Back to Etude](#)

Help for this Page 

Custom Field Definition Detail [Edit](#) [Set Field-Level Security](#) [View Field Accessibility](#)

Field Information

Field Label	Child Records #	Object Name	Etude
Field Name	Child_Records_Count		
API Name	Child_Records_Count_c		
Description			
Help Text			
Created By	Cyril Verhaest, 06/10/2017 16:33	Modified By	Cyril Verhaest, 06/10/2017 16:33

Roll-Up Summary Options

Data Type	Roll-Up Summary	Summary Type	COUNT
Summarized Object	Etude Milestone		
Filter Criteria			

Etude Custom Field
Child Records Last Modified Date
[Back to Etude](#)

Help for this Page 

Custom Field Definition Detail [Edit](#) [Set Field-Level Security](#) [View Field Accessibility](#)

Field Information

Field Label	Child Records Last Modified Date	Object Name	Etude
Field Name	Child_Records_Last_Modified_Date		
API Name	Child_Records_Last_Modified_Date_c		
Description			
Help Text			
Created By	Cyril Verhaest, 06/10/2017 16:34	Modified By	Cyril Verhaest, 06/10/2017 16:34

Roll-Up Summary Options

Data Type	Roll-Up Summary	Summary Type	MAX
Summarized Object	Etude Milestone		
Field to Aggregate	Etude Milestone: Last Modified Date		
Filter Criteria			



Generic Timeline Demo Component – Post Installation Step 3

(1/3) - Choose Object and Specify When to Start the Process

Configure a “Process Builder” on your “Parent Object” that generates “Refresh Timeline Events” (use of Platform Events) when child records are added, modified or removed.

The image shows the Salesforce Process Builder interface. On the left, a process flow is defined:

```
graph TD; START((START)) --> Etude[Etude]; Etude --> ChildRecord{Child Record ...}; ChildRecord -- TRUE --> CreateRefreshTim[Create Refresh Tim...]; CreateRefreshTim --> STOP1((STOP)); ChildRecord -- FALSE --> AddCriteria{+ Add Criteria}; AddCriteria -- TRUE --> CreateRefreshTim2[Create Refresh Tim...]; CreateRefreshTim2 --> STOP2((STOP)); AddCriteria -- FALSE --> STOP2;
```

The configuration dialog on the right is titled "Choose Object and Specify When to Start the Process". It includes the following fields:

- Object:** Etude (highlighted with a blue box)
- Start the process:**
 - only when a record is created
 - when a record is created or edited (highlighted with a blue box)
- Advanced:**
 - Recursion - Allow process to evaluate a record's parent records in a single transaction?
 - Yes

Annotations with blue boxes and arrows point to the "Object" field and the "when a record is created or edited" radio button. The number "8" is visible in the bottom right corner.

Generic Timeline Demo Component – Post Installation Step 3 (2/3) - Define Criteria for this Action Group

Process Builder - genericTimeline_LCMP - Refresh Timeline

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Expand All Collapse All View All Processes Clone View Properties Deactivate Read Only

START

Etude

Child Record ...

IMMEDIATE ACTIONS

Create Refresh Tim...

+ Add Action

TRUE

FALSE

+ Add Criteria

IMMEDIATE ACTIONS

+ Add Action

TRUE

FALSE

Define Criteria for this Action Group

Criteria for Executing Actions *

- Conditions are met
- Formula evaluates to true
- No criteria—just execute the actions!

“Child Records Count” is changed = true
OR
“Child Records Last Modified Date” is changed = true

Set Conditions

Field *	Operator *	Type *	Value *
1 [Etude__c].Chil...Q	Is changed	Boolean	True
2 [Etude__c].Chil...Q	Is changed	Boolean	True

Conditions *

- All of the conditions are met (AND)
- Any of the conditions are met (OR)
- Customize the logic

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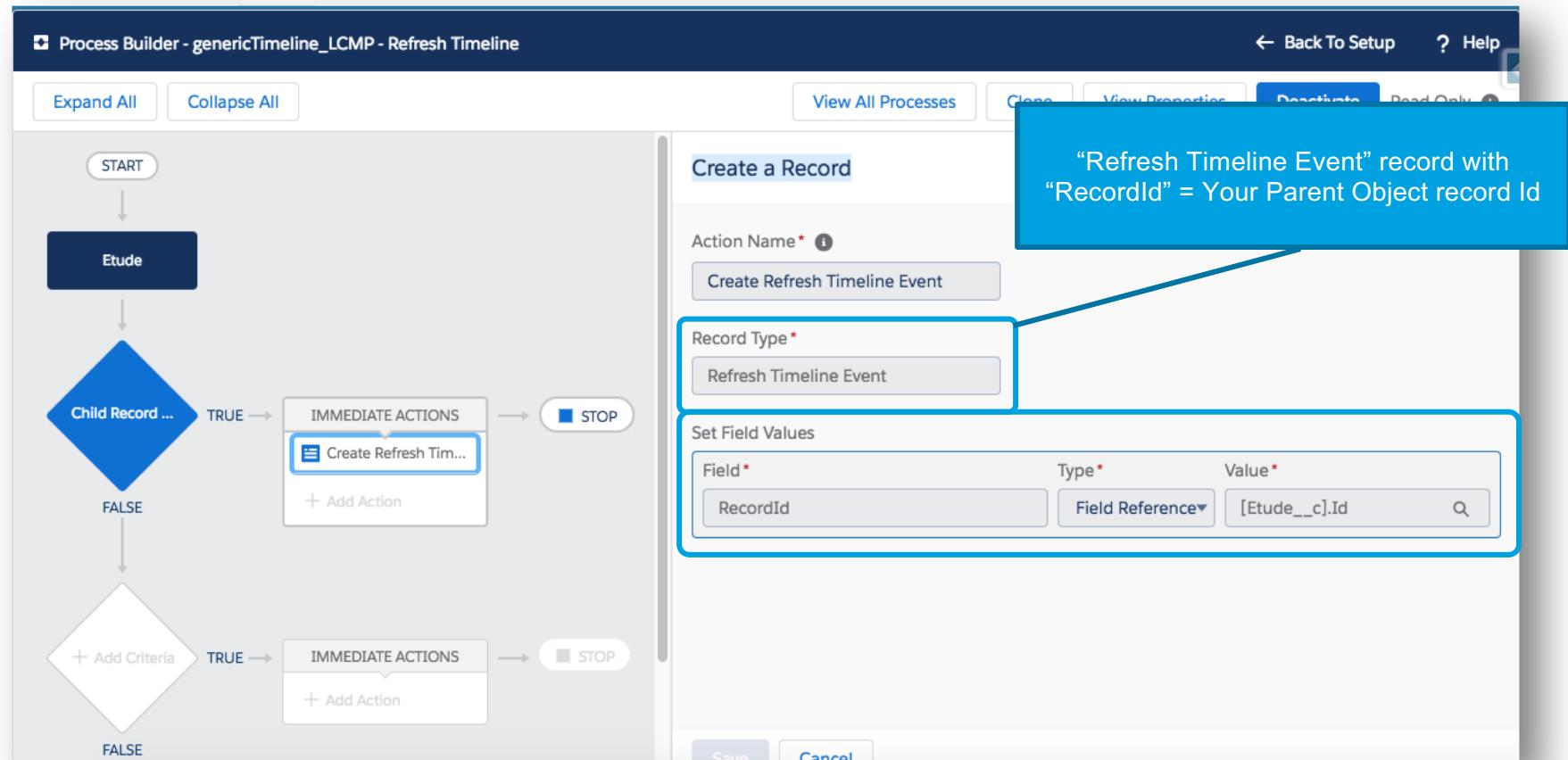
Generic Timeline Demo Component – Post Installation Step 3 (3/3) - Create a “Refresh Timeline Event” record

Process Builder - genericTimeline_LCMP - Refresh Timeline

← Back To Setup ? Help

Expand All Collapse All

View All Processes Close View Properties Details Read Only



“Refresh Timeline Event” record with
“RecordId” = Your Parent Object record Id

Start

Etude

Child Record ...

TRUE →

IMMEDIATE ACTIONS

Create Refresh Tim...

+ Add Action

STOP

FALSE

+ Add Criteria

TRUE →

IMMEDIATE ACTIONS

+ Add Action

STOP

FALSE

Create a Record

Action Name*

Record Type*

Set Field Values

Field*	Type*	Value*
RecordId	Field Reference	[Etude__c].Id

Save Cancel

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