
Generic Timeline Demo Component
Post Installation Guide
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Generic Timeline Demo Component – Introduction *(1/3)*

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

Generic Timeline Demo Component – Introduction *(2/3)*

2. A “Child Object” with at least 2 custom fields:
   - ✓ “Estimated Start Date”: date field
   - ✓ “Real Start Date”: date field

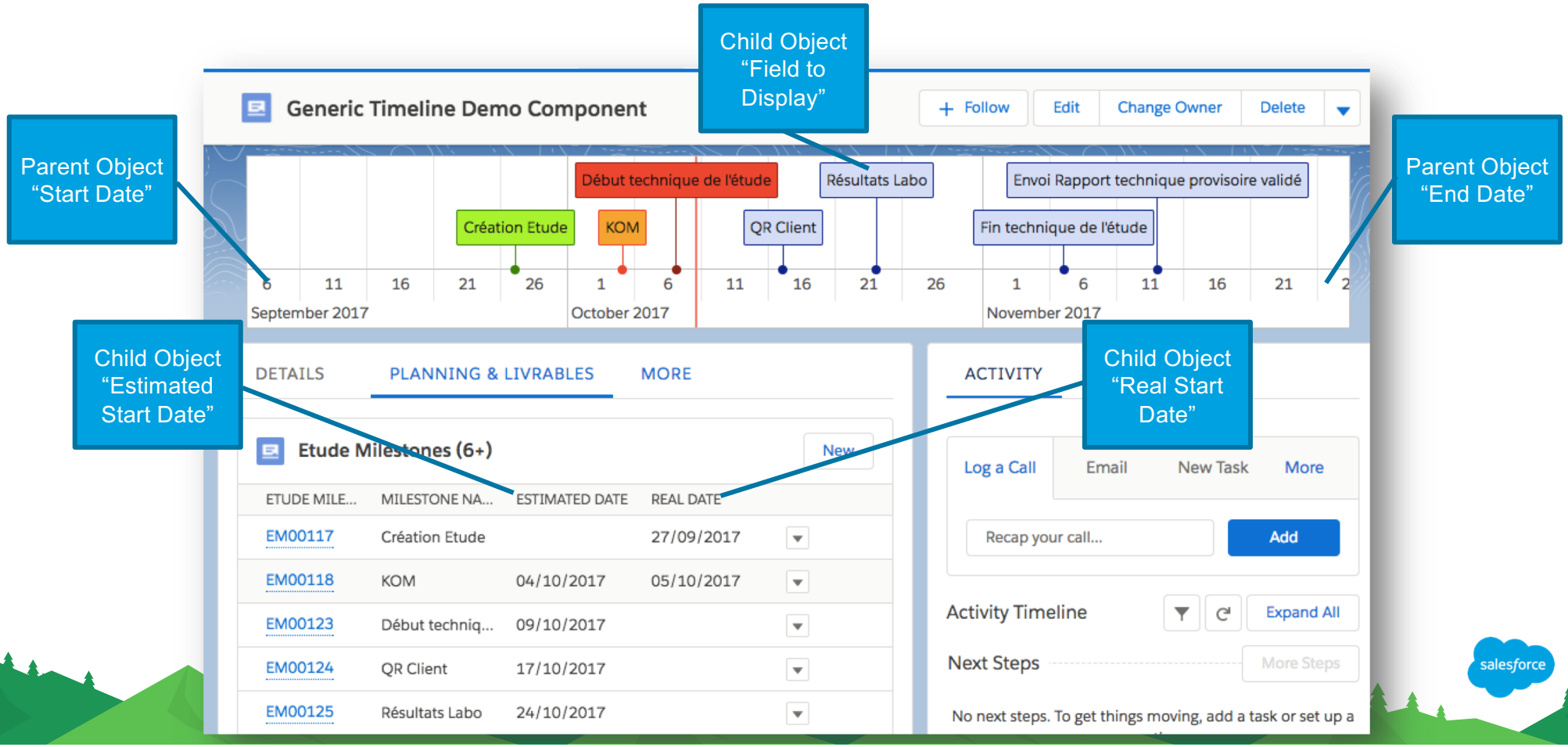
   Optional custom fields are:
   - ✓ “Estimated End Date”: date field
   - ✓ “Real End Date”: date field
   - ✓ “Field to Display on the timeline”: if you want to display something else than the standard “Name” field

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

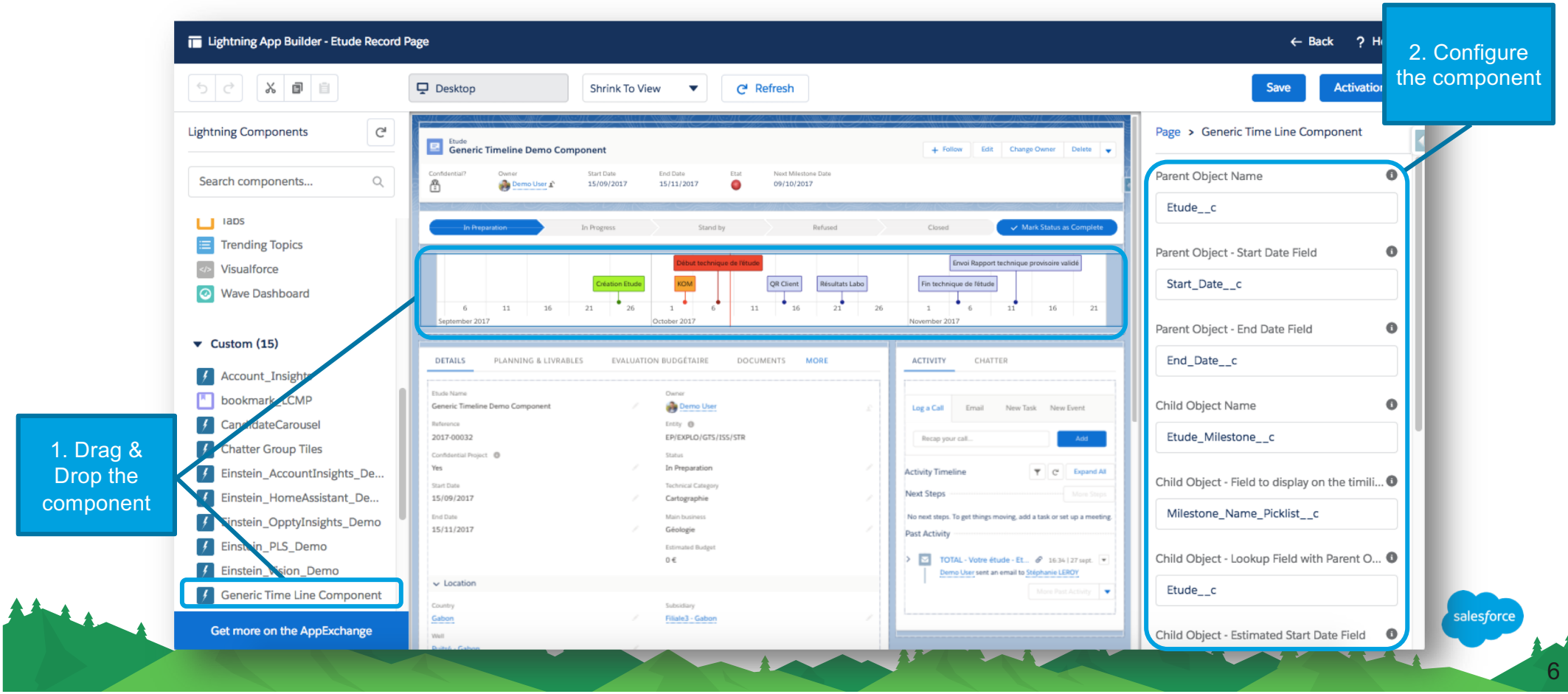
Generic Timeline Demo Component – Introduction *(3/3)*

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



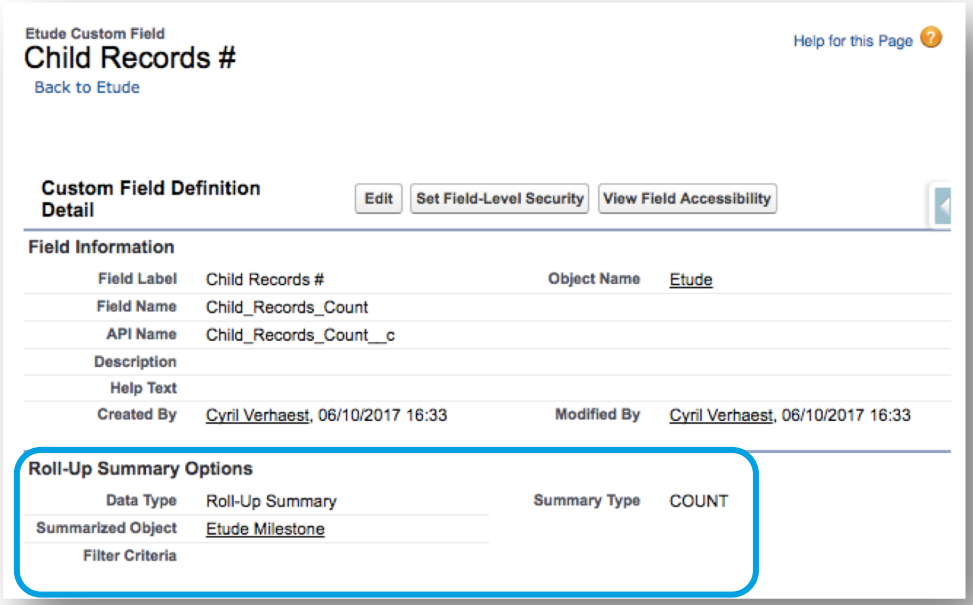
Generic Timeline Demo Component – Post Installation Step 1

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



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

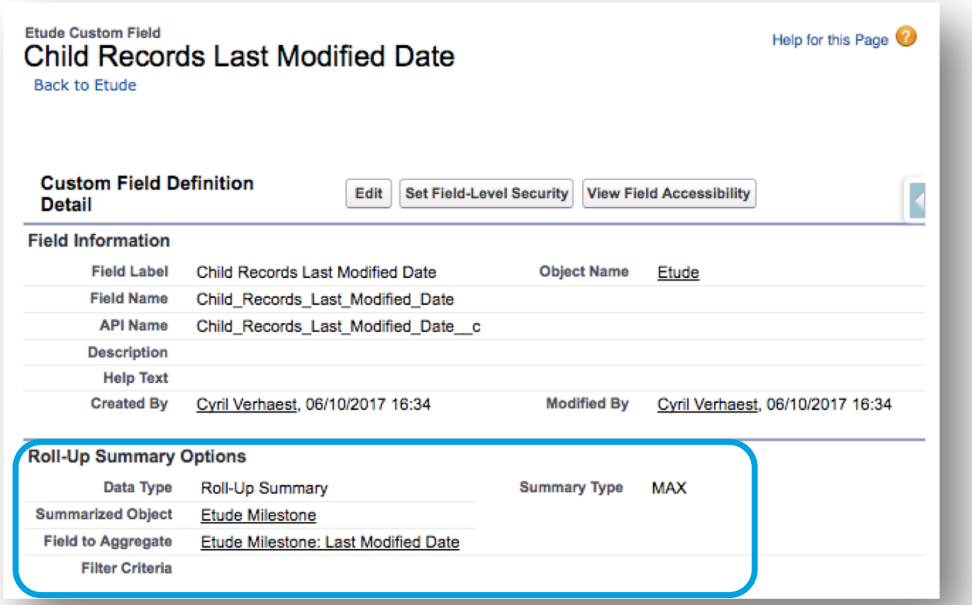
Edit | Set Field-Level Security | View Field Accessibility

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

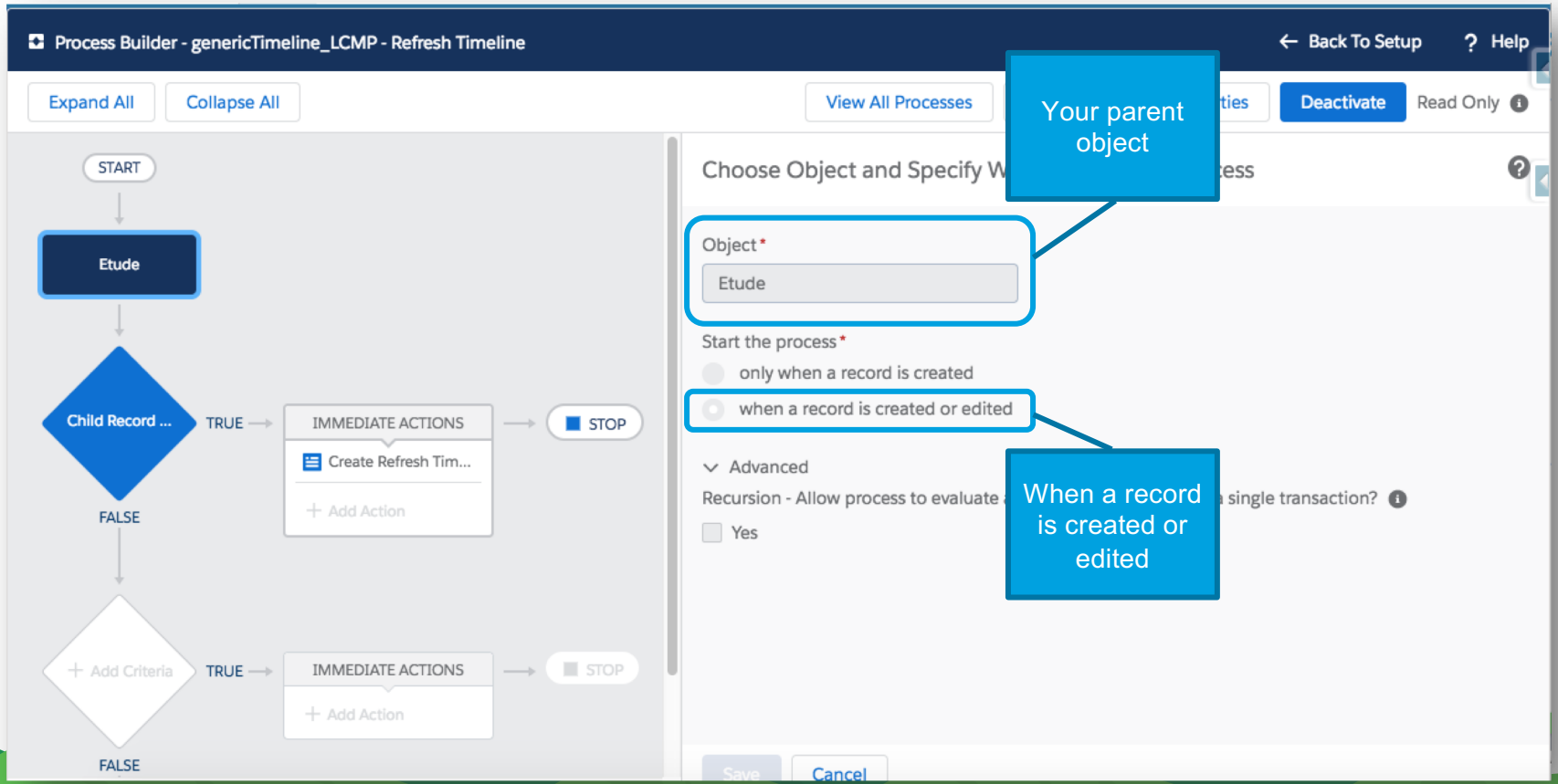
Roll-Up Summary Options

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

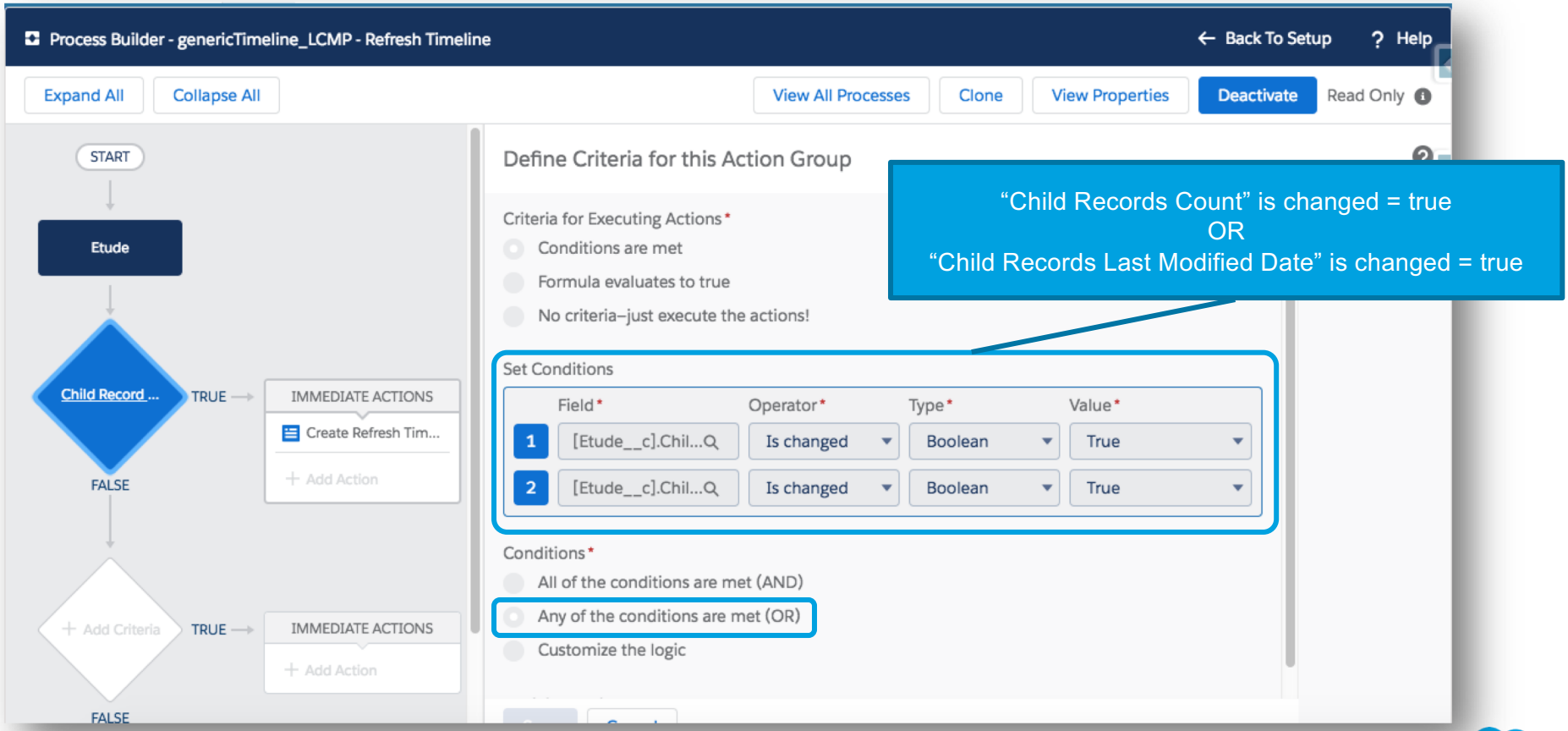
(1/3) - Choose Object and Specify When to Start the Process

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.



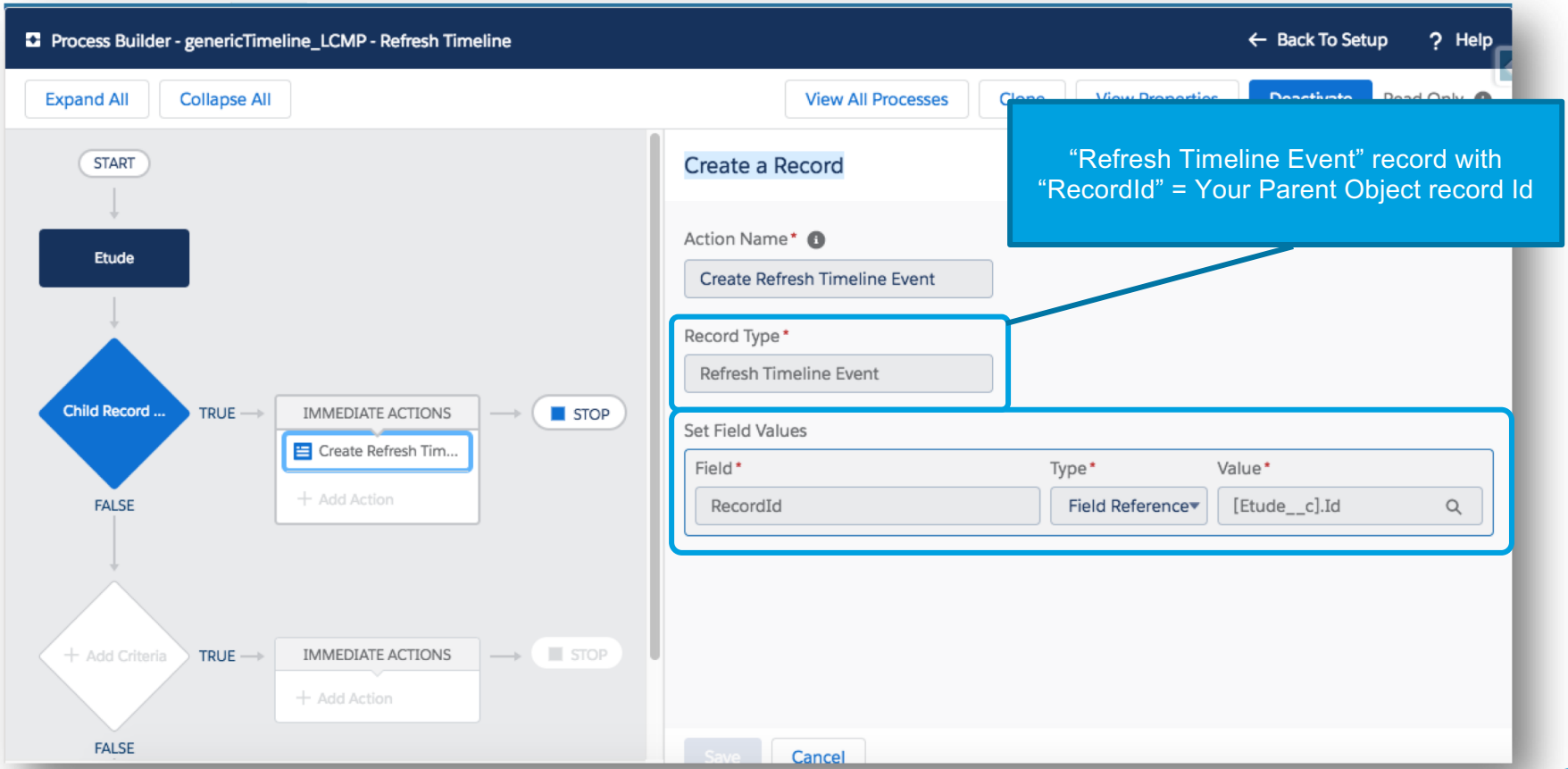
Generic Timeline Demo Component – Post Installation Step 3

(2/3) - Define Criteria for this Action Group



Generic Timeline Demo Component – Post Installation Step 3

(3/3) - Create a "Refresh Timeline Event" record



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