



Easy Gantt

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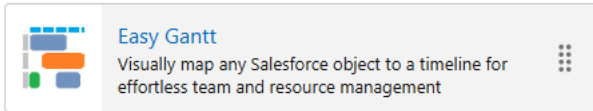
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Getting Started

App

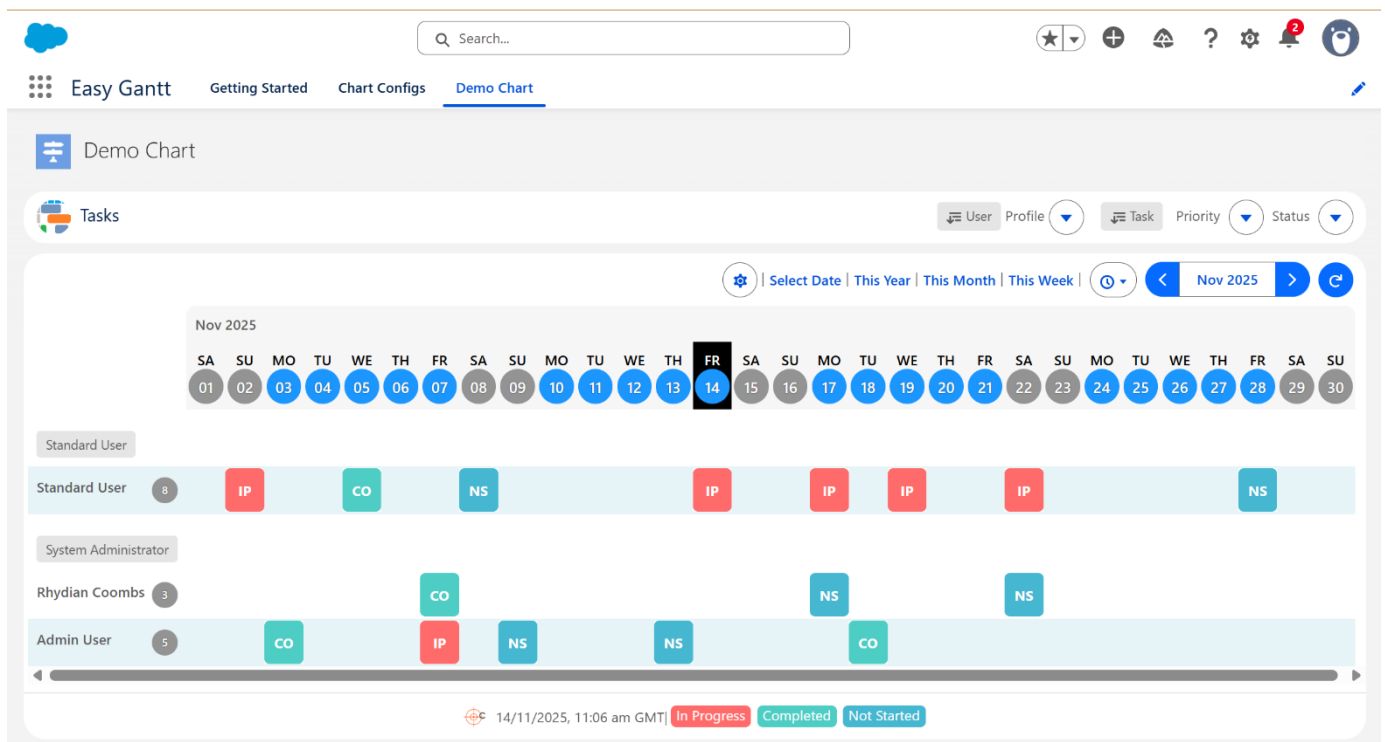
Once installed, the Easy Gantt app is visible for Admin Users and Users assigned to the 'Easy Gantt User' or 'Easy Gantt Admin' Permission sets.



Welcome

The Easy Gantt Lightning Component visualizes your Salesforce records on a dynamic timeline, providing a clear overview of work across your team and queues. It is designed to work with **any standard or custom object**, including Tasks, Events, Leads, Opportunities and more.

The Gantt Chart displays your data with **Owners and Queues, or any Field from your Object on the vertical (y) axis** and a timeline based on your chosen date Fields on the horizontal (x) axis. You can select any two date or datetime Fields from your Objects to define the start and end points for each bar.



Key Features at a Glance:

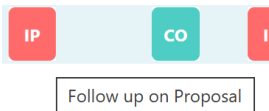
- **Multi-Object Timeline:** Combine records from any number of objects into a single, unified view. See Tasks and Events together, or blend in Opportunities and Leads for a complete picture.
- **Hierarchical View:** Configure your Gantt to view multiple objects in a Hierarchical format like Projects, Milestones & Tasks.



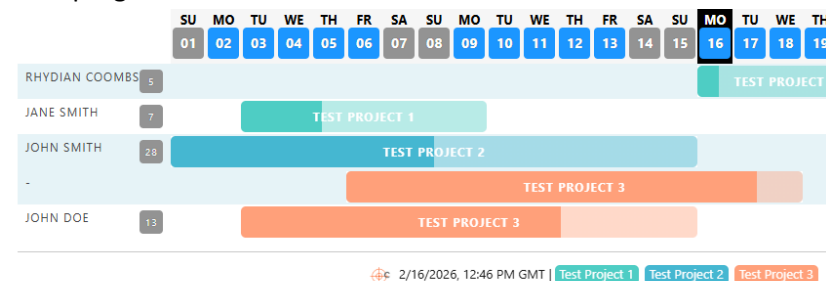
- **Flexible Grouping:** Organize items on the y-axis by Profile, Role or any Field in the Object (like Task 'Status', Lead 'Stage' or Opportunity 'Name').
- **Customizable Legend & Hover Details:** Color code the chart using static text or any text or picklist field (like Task 'Status' or Lead 'Stage').

In Progress Completed Not Started

Configure hover text to show critical information, such as an Event's Subject or an Opportunity's Name.



- **Progress Shading:** Use a percent Field in your Object to control shading of bars giving a visual indication of 'task' progress.



- **Configurable Filters:** Add any number of filters to quickly narrow down the view. Each filter corresponds to a picklist field from the Objects in your Gantt. Click the Filter button  to access the filters popup.

Filters

Queue  User ROLE 

Task PRIORITY 

Task STATUS 

Clear All Filters Close

To help you get started, the app includes several **pre-built Chart Configs**.

Chart Configs												
All												
9 items • Sorted by Chart Config • Filtered by All chart configs • Updated 2 minutes ago												
☐	C...	Config Name	Chart Grouping	Chart Title	Chart Height	Owner Type Filter	User Filter Field	User Grouping Field	De...	Us...	Q...	Rec...
1	☐	0000 Cases Demo (By Type)	Defined In Chart Objects		56vh	Users & Queues	IsActive	Profile	☐	☐	2,000	
2	☐	0001 Events Demo (By Owner)	Owner		56vh	Users	IsActive	Profile	☐	☐	2,000	
3	☐	0002 Events & Tasks Demo (By Owner)	Owner		56vh	Users & Queues	IsActive	Profile	☐	☐	2,000	
4	☐	0003 Leads Demo (By Owner)	Owner		56vh	Users & Queues	IsActive	Role	☐	☐	2,000	
5	☐	0004 Opportunities Demo (By Owner)	Owner		56vh	Users	IsActive	Profile	☐	☐	2,000	
6	☐	0005 Opportunities Demo (By Name)	Defined In Chart Objects		56vh	Users	IsActive	Profile	☐	☐	2,000	
7	☐	0006 Opportunities Demo (By Stage)	Defined In Chart Objects		56vh	Users	IsActive	Profile	☐	☐	2,000	
8	☐	0007 Tasks Demo (By Owner)	Owner		56vh	Users & Queues	IsActive	Role	☐	☐	2,000	
9	☐	0008 Tasks Demo (By Status)	Defined In Chart Objects		56vh	Users & Queues	IsActive	Role	☐	☐	2,000	

You can use, edit, or delete these examples to understand how the configuration works and quickly build your own.



What is a Chart Config?

Chart Config

Chart Config

Tasks Demo (By Status)

EditDeleteClone

User Filter Field

Owner Type Filter

Record Limit

Chart Title

Chart Height

Chart Grouping

IsActive

Users & Queues

2,000

56vh

Defined In Chart Objects

Details

Preview Gantt Chart

Details

Config Name

Tasks Demo (By Status)

Record Limit

2,000

Default Date Range

This Month

Default Date Range Units

Days

Chart Settings

Chart Grouping

Defined In Chart Objects

Optional Details

Chart Title

Chart Height

56vh

The **Chart Object** specifies which Salesforce data object (e.g. Task, Event, Lead, Opportunity, custom object...) appears in your Gantt chart and how it is rendered.

A **Chart Config** MUST have one, but can have multiple **Chart Objects**, allowing for combined visualizations (e.g. Tasks & Events in one Gantt Chart).

Chart Objects (1)

1 item • Sorted by Chart Object • Updated a few seconds ago

Chart Object

Object Name

Grouping

Start Date Field

End Date Field

Filter Field

Hover Text...

Legend Fie...

1

2507

Task

Status

ActivityDate

Subject

Status

View All

System Information

Created By

Rhydian Coombs

01/03/2026, 18:50

Owner

Rhydian Coombs

Last Modified By

Rhydian Coombs

01/03/2026, 18:50

A Chart Config is the master record that holds all the settings for a specific Gantt Chart view. When you add the *Easy Gantt* Lightning Component to a page, you select a Chart Config. The component then uses all the details within that configuration to render the Gantt Chart exactly as required.



Chart Object

 Chart Object
Task

[Edit](#) [Delete](#)

Chart Config 2210	Start Date Field ActivityDate	End Date Field	Grouping Status	Legend Field or Text Status	Order	Hover Text Field Subject
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Details

Chart Filters

▼ Required

Object Name ⓘ	Task	Start Date Field ⓘ	ActivityDate
Sharing Rules ⓘ	Ignore Sharing Rules		

▼ Required (if Chart Grouping is set to 'Defined In Chart Objects')

Grouping Field ⓘ	Status		
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▼ Optional Details

End Date Field ⓘ	Filter Field ⓘ		
Legend Field or Text ⓘ	Status ⓘ	Hierarchy Field ⓘ	
Order ⓘ	Progress Field ⓘ		
Hover Text Field ⓘ	Subject ⓘ	Parent Field ⓘ	WhatId ⓘ

▼ System Information

Created By	 Rhydian Coombs · 01/03/2026, 18:50	Last Modified By	 Rhydian Coombs · 01/03/2026, 18:50
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Each Chart Config contains one or more Chart Object records. A Chart Object defines a specific Salesforce Object (like Task or Opportunity) to include in the Gantt Chart. For each object, you specify:

- The API Name of the Object.
- The Date fields for the timeline (you can select a single date or a start and end date pair).
- The Grouping Field (used to define the data grouping when not grouping by Owner).
- The Legend Field or Text (text or picklist used for color-coding).
- The Hover Text Field (the data shown on mouseover).
- The Filter Field (control which records will be displayed in the chart).
- The Hierarchy Field (used to define a parent-child relationship when more than one Chart Object is rendered in the Gantt Chart)
- The Progress Field (visually show progress of time)
- Whether sharing rules are enforced or not.
- Whether to only show records related to the record page being viewed (when the Gantt Chart is placed on a Lightning record page).



Chart Filter

**Chart Filter**

Status

EditDelete

Chart Object	Filter Field Values To Include	Filter Field Default Value	Filter Allow Multi Select
2507	.		☐

Required Details

Filter Field	Status
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Optional Details

Filter Field Values To Include	Filter Allow Multi Select
Filter Field Default Value	

System Information

Created By	 Rhydian Coombs · 01/03/2026, 18:50	Last Modified By	 Rhydian Coombs · 01/03/2026, 18:50
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A Chart Object can optionally have one or more Chart Filter records. A Chart Filter defines a picklist field from the parent Chart Object that will be used to filter the data. For each filter, you can:

- Restrict which picklist values are available in the filter dropdown.
- Set a default value that is selected when the Gantt Chart loads.
- Define if users can select one or multiple values from the filter simultaneously.

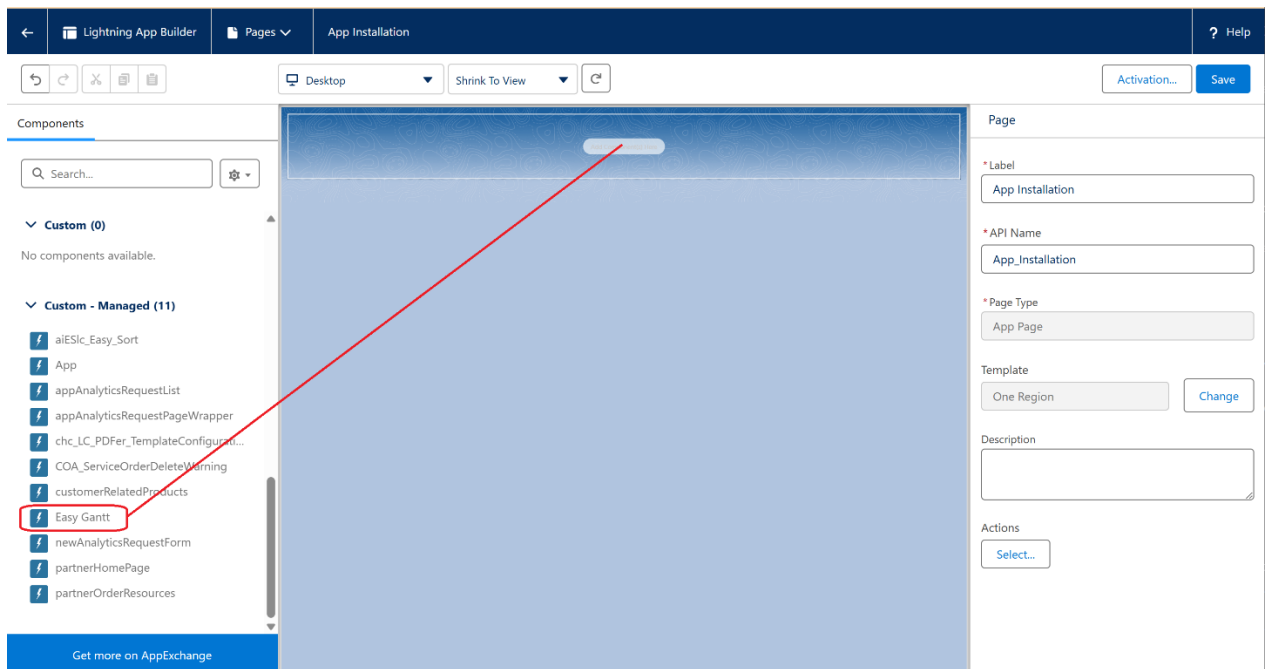
Use the Chart Configs tab within the app to add new configurations or edit and delete existing ones.



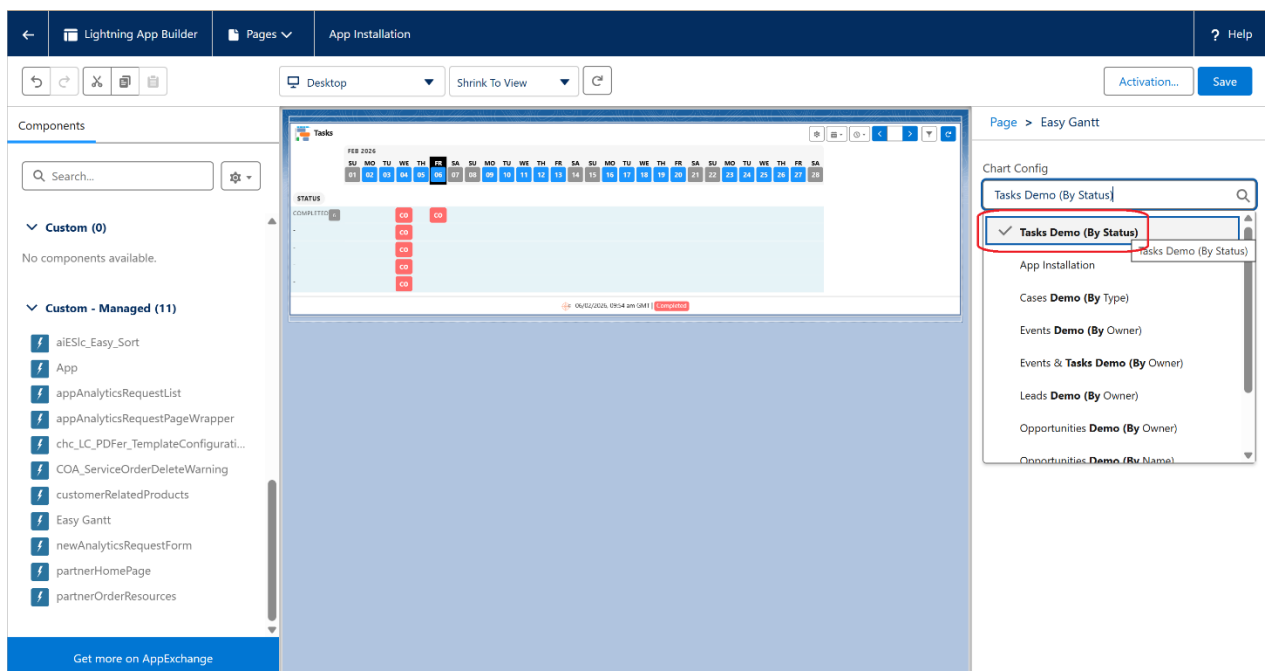
Adding a Gantt Chart

To add the Gantt Chart to your Salesforce page, follow these steps:

1. **Edit the Lightning Page:** Navigate to the Lightning App Page (like a Home Page, App Page, or Record Page) where you want the Gantt Chart to appear and enter edit mode.
2. **Add the Component:** From the Lightning Components list in the sidebar, locate and drag the Easy Gantt component onto your page's canvas.

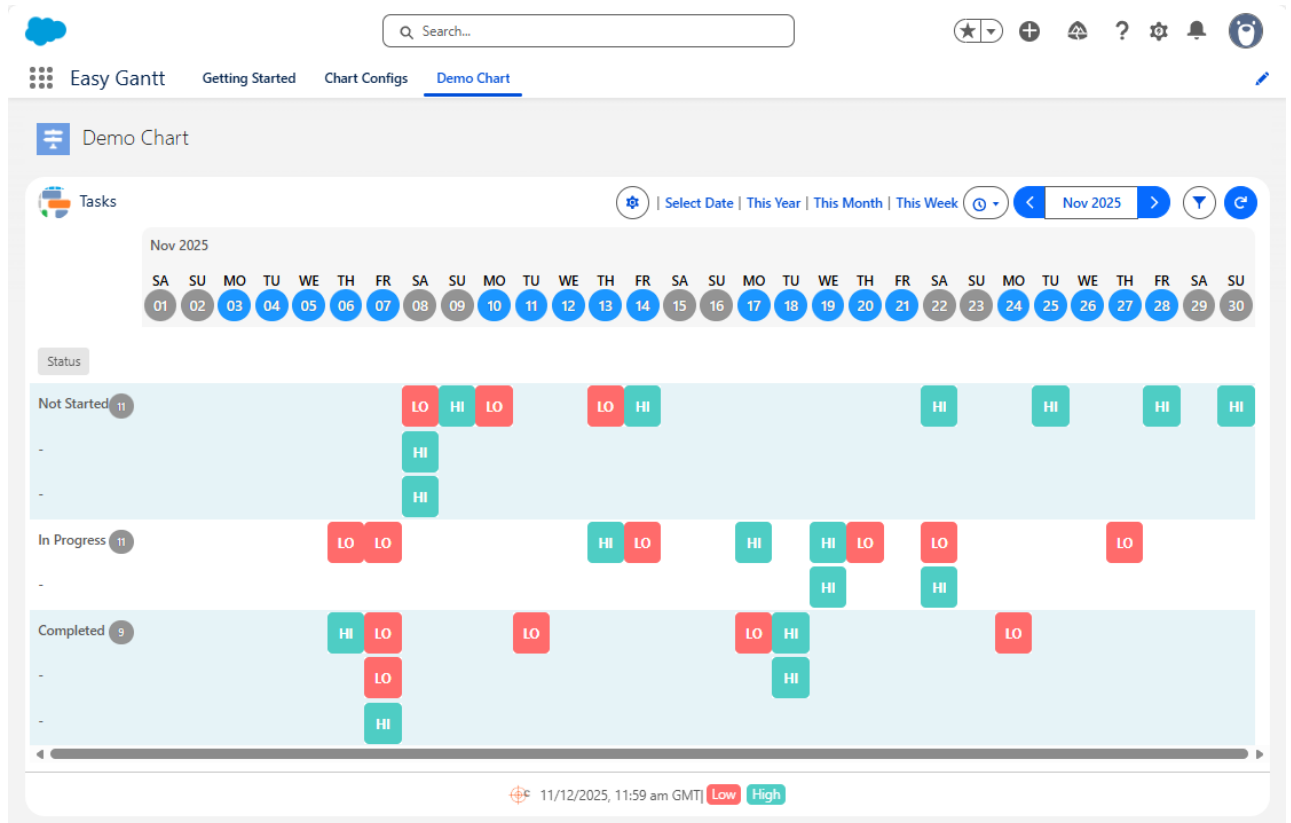


3. **Configure the Component:** In the component's properties on the right-hand panel, you will see the 'Chart Config' attribute. Use the dropdown to select one of the pre-built configurations.





4. **View Your Page:** Save and exit the page editor. The Easy Gantt Chart will now render on your page, displaying data according to the rules and objects defined in your selected Chart Config.



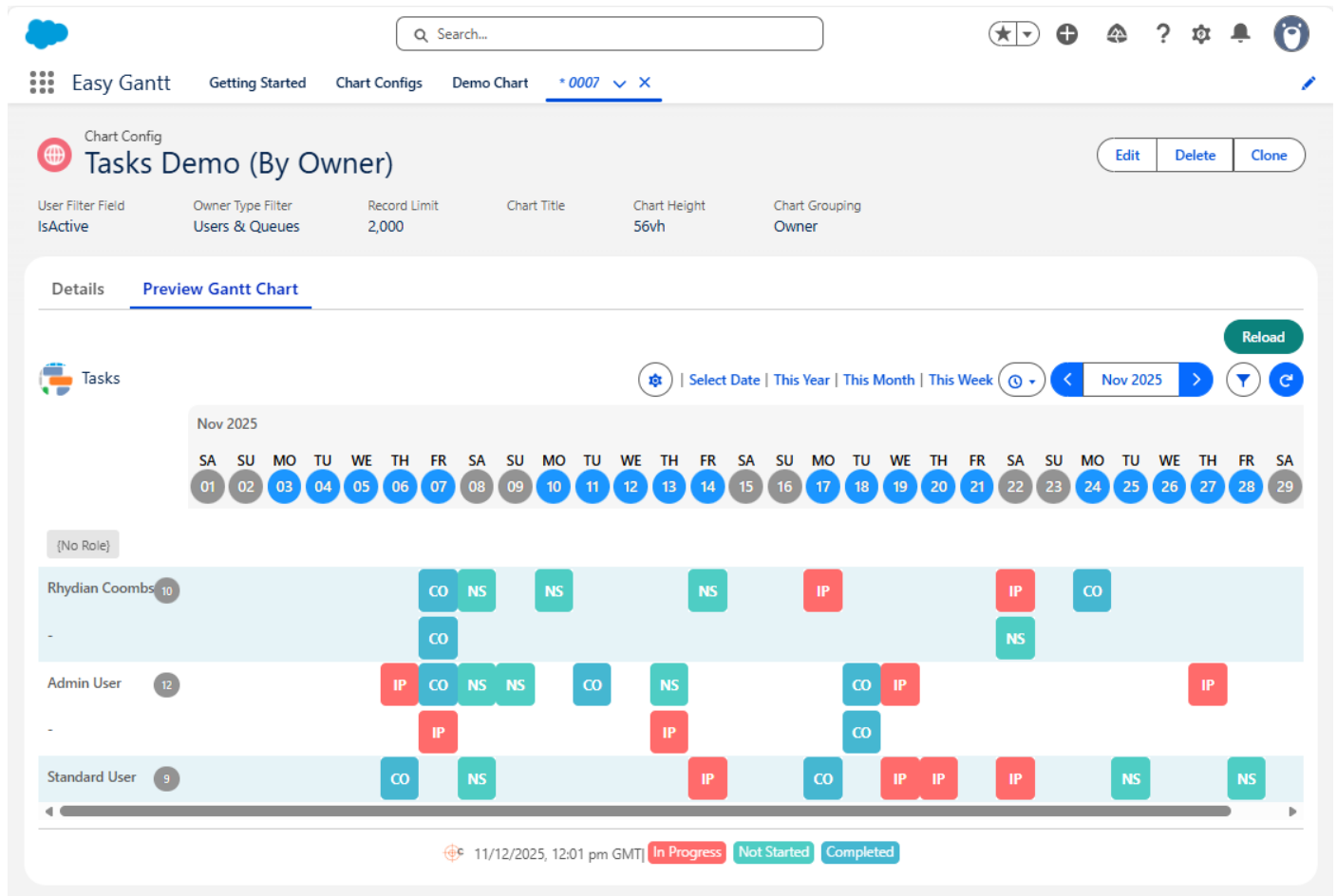
You can now begin exploring your data visually. To further customize the view, use the Chart Configs tab within the app to add new configurations or edit and delete existing ones.



Preview a Gantt Chart

Preview your Gantt chart while you're building it, *before* you add it to a page.

Where to find it: In any Chart Config, click the 'Preview Gantt Chart' tab.



Use it to:

- **Check your work** and spot errors.
- **Test changes** to filters, colors, and dates.
- **Tweak settings** and see the results in real-time.

It's the fastest way to perfect your chart before adding it to a page, saving you time and guesswork.

Security

Access is managed through two permission sets:

Easy Gantt Admin

- Has full access to the Easy Gantt application.
- Can view, create, edit, and delete chart configurations.
- This role is for users who set up and manage the charts.



Easy Gantt User

- Has permission to view Gantt charts.
- Cannot modify any chart configurations.
- This role is for users who only need to see the visual timelines when charts are embedded on a page.



Real Time Settings

Click the **Settings** button  above the Gantt Chart to adjust the following options.

Settings

Gantt Chart Height (vh)
0-100

56

Auto Refresh Interval (seconds)
0-100

65

Close

Gantt Chart Height

- *What it does:* Adjusts the height of the Gantt Chart.
- *How to use:* Use the slider to find a height that fits the Gantt Chart on your screen. A scrollbar will appear if needed.

Auto Refresh Interval

- *What it does:* Automatically updates the chart at a set interval.
- *How to use:* Select a time (between 5-100 seconds) for hands-off updates. Ideal for a shared team screen.