Customized Timeline Process

1 Post Installation Steps

- Note: the application depends on the base application MBA Utils. The base application must be installed before this application.

After installation please go through the following steps and implement according to your company needs. Note that all the steps can be done at any point in future, however some of the features might not be available before completing the steps.

1.1 Set up the objects type you are going to use

- Some of the application logic is based on custom triggers. Therefore you should set up triggers for the object types you wish to use.

1.Go to tab **Asynchronous Manager**
2.From the button menu on the left, click the button **Manage Triggers**
3.Using the drop-down select object that you want to work with and click the button **Deploy** and confirm the process by clicking **OK.**
4.Once the deployment completes an appropriate message will be displayed.

  - In some cases the deployment might take longer (depending on Salesforce instance). In such a case an appropriate message will indicate that the process will continue in background and you will be notified by email upon completion.

- You can go back to this process at any point and add or remove object types.

1.2 Modify record page for object

The application contains several custom components that optionally can be added to the lightning record page:

1. **Record Markers View** - display markers related to the record that is currently being viewed. For more details, see Record Marker View.
2. **Markers in Record Page** - newer version of the first component that contains more advanced features. For more details, see Markers in Record Page.
3. **Loker Component** - Using this component users can lock/unlock the record and monitor the existing locks for the record.

2. Timeline Process

2.1 Define Timeline Process

1.Go to tab **Timeline Processes**
2.Click button **New**
3.Set up the following input:
Name - free text
Description (optional) - free text
Related Object - object type that the timeline working on
Markers Order - user Parallel - to indicate that any marker in this process can be closed at any point, or use Sequential to indicate that the markers should be completed in order.
When Process Starts? - choose either **Record Creation** to initiate the process only when the record created, or **Record Creation or Update** which will start the timeline process either when record created or first time it is updated to apply to the process criteria
Continue Upon Violation - relevant for sequential processes. If checked, the process will continue to the next marker even if the previous marker was violated.
Markers Close Dependency - relevant for Parallel process. If checked, when a higher sequence marker is completed and there lower sequence markers that are still open they will be automatically closed.
Markers Violation Dependency - relevant for Parallel process. If checked, when the marker deadline was violated, other open markers will be automatically marked as violated.
Business Hours (optional) - if you want that the timeline process will count only business hours that match your company, reference to business hours setup in Salesforce. For more information about business hours see [Set Business Hours]
Filter (optional) - set up a filter to match the records that the timeline process should work on. For more information see [How to Use Filter Data Component].
Exit Criteria (optional) - set up criteria for ending the process. When a record will enter this exit criteria, its existing markers which are still in progress will be deleted.
4.Click **Save**

2.2 Define Markers

1.Go to Timeline Process record
2.Click button **Add Marker**
3.Set up the following input:
Marker Name - free text
Sequence - sequence order (1, 2, 3 …)
Start Counting From - when the time should start counting. Options are: Record Creation Date/Process Starting Date/Previous Marker Completion
Time Target - unit of time that the marker should be completed within
Measurement - time measurement can be either Days/Hours/Minutes

- Alternatively, click the icons → next to the **Start At/Target**, in order to use merge date fields that will be used to calculate the start/target time.

- When using merge fields, optionally check the option **Recalculate Start/Recalculate Target**. With those options checked, change in the relevant date field on the record will cause recalculation of the start/deadline date, respectively.

Criteria Type - defining the type of required actions to complete this marker. Options are:

- **Based on Main Record** - marker will be completed per data in the main record that related to the process
- **Based on Related Data** - marker will be completed, based on aggregate data in the child records that relate to the main record.
- **Task Completion** - marker will be completed when the user will manually complete a specific task.

Repeated - check the option to indicate that the marker can be assigned to a record more than once. In such a case, any time a record enters the timeline/marker entry criteria and it doesn't have such an open marker, then a new marker will be created.
Entry Criteria (optional) - set up a filter to control which records will be assigned to the marker. For more information see [How to Use Filter Data Component](#).
Exit Criteria (optional) - set up criteria for existing this specific marker. When a record will enter this exit criteria, its existing markers which are still in progress will be deleted.

❖ Note. The entry/Exit criterias are evaluated before the completion criteria. If a record is updated to meet both the completion and the exit criteria, then it will exit the marker.

4.Additional input is needed according to the **Criteria Type**.

- For type **Based on Main Record**, set:
  Target Criteria - define logical criteria to determine when this marker will be completed. For more information see [How to Use Filter Data Component](#).
- For type **Based on Related Data**, set:
  Child Object - child object that logic is based on
  Reference Parent - reference field in the child to the parent. If there is only one field, it will be auto populated.
  Function - aggregate function for the collected data. Options are: Count/Sum/Max/Min/Average
  Summary Field - if the **Function** is other Count, should select the field to collect
  Operator - the operator to use when we compare the aggregation value against the expected result. Options are Equal/Greater Than/Greater Than or Equal/Less Than/Less Than or Equal
  Target Value - the expected value from the aggregation. When the target value is met, then the marker will be completed.
- For type **Task Completion**, set:
  Task - reference to a task record
  Task Authorization - define which users are allowed to complete the task.

5.Click **Save**

2.3 Define Markers Actions

1.Go to Timeline Process record

2.Click icon next to the relevant marker

3.Setup the following input:

Action Name - free text

Type - choose either Violation to set action that runs before/after marker violation time or Completion to set action that runs when marker complete

Action - Choose from 5 options

Alert - send email

Update Record - update the related record in the timeline process

Lock Record - lock the related record in the timeline process

Unlock Record - unlock the related record in the timeline process

Run Template - use Job Template for manipulate related data

4. If the Action is an Update Record, choose the record that needs to be updated.

5.If the Action Type is Violation, then you should set additional inputs:

Action Time - number that represent time units

Measurement - select the time measurement. Can be Days, Hours, Minutes or Percentage

Action Time Type - set either **Before** to run the action before the violation happens, or **After** to the action after the violation occurred.

6.Additional input is required according to the Action.

For **Alert** action:

- Tag the option **Use Email Template** in order to select an existing classic email template, or set up the alert subject and content.
- Add Recipients using the icon .
    - Note that in the subject or content you can reference fields from the object with the syntax {!fFieldName}. For example writing **{!Name}** will use the record name at run time and will be replaced with the actual value.
    - Each recipient can be either reference to a specific user, specific email address, user field or email field from the related record that will be used in run time.

For **Update Record** action: Add fields that you want to update using the dropdown selection and per each field set up the value to be updated

For **Lock Record** action set up

Lock Error Message - text that will be displayed during lock

Expire After (Days) - to limit the lock date, or leave empty for unlimited lock

Lock Specific Fields - lock only specific fields or do not select any field to lock everything

Exclude Profiles - exclude specific profiles from the lock or do not select any profile apply the lock for all profiles.

For **Unlock Record** action no additional input is required.

7.Click button **Save**

- It is your responsibility to avoid locks that will block other actions. You may add **Update Record** action and **Lock Record** action for the same marker and it will work, but adding update action when the record is already locked will fail due to the lock.

2.4 Activate Timeline Process

1.Go to Timeline Process record.

2.Click button **Activate** or **Deactivate**. Only one of these buttons will be available according to the data event state. When it is inactive the **Activate** button will be available and if it is inactive, the **Deactivate** button will be available.

2.5 Create new Timeline Process Version

After activating the timeline process you can deactivate it, but cannot add changes to the process. To add changes for such a process you must create a new version of the process, add the changes in the new version and activate the new version..

1.To create a new version go to Timeline Process record.

2.Click button **Create new Version**. This will copy the timeline process, markers and actions to a cloned version.

3.Add changes in the new version as described in section 2.1 - 2.3.

4.Click button **Activate** to make the new version activate.

- Activating the marker process version, will automatically deactivate any other version of this process

2.6 Export/Import Timeline Process

If you are using sandbox, then you might want to define the timeline process in the sandbox, test it and then create the same timeline process in production.
In order to save manual work, you can export the process from the first environment and import it to the second environment.

- Export Multiple Timeline Processes
    - Go to the tab Timeline Process
    - Using the checkbox select the Timeline Processes that you want to export
    - Click the button **Export Timeline Process**
    - Select the output: receive an email with a file or download it from the page.

- Import Multiple Timeline Process
    - Go to the tab Timeline Process
    - Click the button **Import Timeline Process**

    - Click the button **Upload Files** and select the file that you received during an export process
    - The screen will show the timeline processes in the file. Using the checkbox select the timeline processes that you want to import.
    - Click the button **Continue**
- Export Single Timeline Process
  Go to a specific timeline process record and click the button **Export**. You should receive an email with a file attached (.json file). This file will hold the timeline process definitions.
- Import Single Timeline Process
  Go to the tab Timeline Process and click the New button.
  Click the button **Import**, a dialog box will be opened.
  Click the button **Upload Files** and select the file that you want to import.
    *In case the process already exists, then a new version of the process will be created.
    *The import only create the Timeline process and its related data, it is still has to be activated

➔ Note. If the exported file was created using the multiple method, then it cannot be imported using the single method.

<u>2.7 Timeline Task</u>

When defining markers, you can define target criteria - rules that will automatically complete the markers, or you can use Timeline Task.
Timeline Task is an interactive screen that users will need to go through in order to complete the marker.

To set up Timeline Task:

- Go to the tab **Timeline Task**.
- Click the button **New**.
- Provide a name.
- Select the Type
    - View Content - users will need to read information or answer questions.
    - Add Content - users will need to add content, such as uploading a file.
- Click the button **Save**.
- Click the button **Add Step**.
- In the dialog click the icon + to add content to the screen.
- Fill the relevant information and click the button **Save**.

3.Aggregate Timeline Measurement

3.1 Define Aggregate Timeline Process

1.Go to tab **Aggregate Timeline Measurement**
2.Click button **New**
3.Set up the following input:
Name - free text
Description (optional) - free text
Related Object - object type that the timeline working on
Aggregation - type of aggregation.
Aggregation Field (require if the Aggregation is other than COUNT) **-** field from the Related Object that its value will be aggregated.
Split by Field - field from the Related Object that its value will be used to split values into groups.
Date Field - date/datetime field from the Related Object which according to its value system will determine the record is included in the calculation.
Allow Time Accuracy- select this option to allow setting date/time accuracy when setting groups.
Filter (optional) - set up a filter to match the records that the timeline process should work on.For more information see How to Use Filter Data Component.
4.Click **Save**

3.2 Define Groups

1.Go to Aggregate Timeline Measurement record
2.Click button **Add Groups**
3.The input screen will rendered according to the **Split by Field** that was set up
-If the field is referenced to another object (lookup), then select related records.
-If the field is picklist - select picklist values
-If the field is text field then set up each group name in separated line
4.Click button **Next**
5.Per each group set up the **Target, Start and End**
6.Click **Save**

3.3 Define Aggregate Actions

1.Go to Aggregate Timeline Measurement record
2.Click icon + next to the relevant group
3.Setup the following input:
Action Name - free text
Timing Type - choose when this action should be running. Can be either when the group has reached a specific percentage or according to Start/End date in the group level.

In case the Timing Type is **Percentage,** set up the **Percentage** value, and in case it is per date setup the **Timing** and the **Measurement**.

4.In the **Alert Settings**

- Tag the option **Use Email Template** in order to select an existing classic email template, or set up the alert subject and content.
- Add Recipients using the icon .
    - Note that in the subject or content you can reference fields from the Aggregate Group record with the syntax {!fFieldName}. For example writing **{!Name}** will use the record name at run time and will be replaced with the actual value.
    - Each recipient can be either reference to a specific user, specific email address, or in case the groups are reference to Users it can be the related user.

5.Click either **Save** to create the action for a specific group, or **Save to All Groups**, to apply a similar action per each group.

3.4 Activate Timeline Process

1.Go to Aggregate Timeline Measurement record.

2.Click button **Activate** or **Deactivate**. Only one of these buttons will be available according to the data event state. When it is inactive the **Activate** button will be available and if it is inactive, the **Deactivate** button will be available.

4.Locker Service

Using the locker service you can lock specific records. In each lock you can lock only specific fields and set a date range for the lock.

4.1 Lock Specific Record

- Users can lock records that they have edit permission for according to your company security settings.

1.Go to a specific record detail page.
2.Press button **Lock Record**
3.Set up the following input:

Lock Reason - free text.

Lock Error Message - free text. This message will be displayed whenever the user is trying to update the record and being locked.

Effective Date - start date for the lock

Expiration Date - when the lock will expire. Can leave it empty to set an unexpire lock.

Lock Deletion - checkbox. Indicate if the lock should also block when trying to delete the record

Who Can Unlock - multi selection. Parties that can release the lock. Can select:

Locker - the user who set the lock
Owner - owner of the record
Manager - the manager of the user who lock the record

Lock Only Specific Fields - optionally select the fields that you want to lock. Leave empty to lock all the fields.

Exclude Profiles - optionally exclude specific profiles from the lock.

Exclude Me - select this checkbox to exclude your user from the lock.

4.2 Request to Release Lock

- Users can request to release the lock from record if they have edit permission for the record according to your company security settings.

1.Go to specific record detail page
2.Click icon
3.Enter **Comment** describing why you are asking to release the lock
4.Select the **Request From**. Your request will be send to this user.
5.Click button **Save**

4.3 Release Record Lock

1.Go to specific record detail page
2.Click icon
3.Optional enter **Comment** describing why it is being unlocked.

4.Click button **Save**

5.Filter Data Component

The Filter Data Component is widely used in many sections in the application. It is mainly, but not only, used to construct logical criteria for specific object type.

5.1 How to Use Filter Data Component

The following section describes how to use the component.

1. Add criteria.

Click the icon to add new criteria.
You will notice a new line being added. In the **Field** input you can either choose field from the dropdown list or use the icon to open the lookup window and select the field. Select the **Operator** from the dropdown list and finally add the **Value** to compare the field to.

- You can add several criteria lines. In case, there is more than one line you will need to set a relation between them in the **Criteria Logic**. For example, if you have 3 criteria lines, the criteria logic might be **1 AND (2 OR 3)**

2. Remove criteria

Click the icon next to the criteria line you want to remove.

3. Validate criteria

Click icon to validate your criteria. If there is an error it will be displayed above the criterias.

4. Clear Criteria

Click icon to clear the criteria.

5.2 Construct Text for Filter

In some areas in the application, we will want to provide the output of the component as text value. For example, in component configuration.
In order to get such value, you can do the following steps:

1. Open a component that displays the filter component.
2. Construct your filter per your needs.
3. Click the icon and the component output will be copied to your clipboard
4. Paste the output using ctrl+v to the required input.

6. Managed Components to Display Markers

The package provides several components to display markers and those can be added to your lightning pages. The following section describes the different components, their usage and their configurations.

6.1 Record Marker View

The component can be added to any lightning record page and is used to display the record related markers.

Configuration

Property Name	Type	Usage
Page Header	Text	Title for the component
Allow Recreate Markers	Checkbox	Show/hide button for recreating the markers
Allow Pause/Resume	Selection	Show/hide button for pausing the marker's progress. Options: ● No one ● Users with edit access ● Users with edit access and permission Pause Timeline Markers
Markers View	Selection	The presentation of the markers. Options: ● Table ● Flow ● Both
Interval Seconds	Number	Relevant for Flow presentation. The interval to reduce the counter (in seconds)
Warning Level 1 Threshold	Number	Relevant for Flow presentation. The percentage time left where the UI circle changes its color to orange.
Warning Level 2 Threshold	Number	Relevant for Flow presentation. The percentage time left where the UI circle changes its color to red.
Circle Size	Selection	Relevant for Flow presentation. Options: ● Large ● Medium ● Small

Property Name	Type	Usage
Show Counter After Violation	Checkbox	Show/hide the counter also for markers that already violated
Table Headers	Text	Relevant for Table presentation. List of table headers (use comma separator).
Table Fields	Text	Relevant for Table presentation. List of fields to display (use comma separator). The list can contain few unique values: ● Counter1 - show basic counter ● Counter2 - show enhance counter 2 ● Counter3 - show enhance counter 3 ● Counter4 - show counter in format Xd 11h:11m:11s ● Marker_Link - show link to the marker record
Order Markers in Table	Test	Relevant for Table presentation. Field that will be used to sort the table
Order Markers in Table Direction	Selection	Relevant for Table presentation. The sorting direction. Options: ● ASC ● DESC
Markers Per Page	Integer	elevant for Table presentation. Optionally, limit the number of markers that are displayed and use pagination.

6.2 Markers in Record Page

The component can be added to any lightning record page and is used to display the record related markers.

Configuration

Property Name	Type	Usage
Metadata Settings	Text	Reference to configuration that contains all the relevant settings. See section 7.1.

6.3 My Markers

The component can be added to any lightning record page, home page or app page, and can be used to show the users their open markers from all the timeline processes.

Configuration

Property Name	Type	Usage
Metadata Settings	Text	Reference to configuration that contains all the relevant settings. See section 7.1. In case this setting is set, then it overrides all the other settings.
Page Header	Text	Title for the component.
Allow Change Settings	Checkbox	Show/hide button where the view can change the settings.
Table Headers	Text	List of table headers (use comma separator).
Table Fields	Text	List of fields to display (use comma separator). The list can contain few unique values: ● Counter1 - show basic counter ● Counter2 - show enhance counter 2 ● Counter3 - show enhance counter 3 ● Counter4 - show counter in format Xd 11h:11m:11s ● Marker_Link - show link to the marker record ● No one ● Users with edit access ● Users with edit access and permission Pause Timeline Markers
Order By	Text	Field that will be used to sort the table.
Order Direction	Selection	The sorting direction. Options: ● ASC ● DESC
Pagination Size	Number	Number of records to display per page.
Filter Data	Text	Optional. Provide text value to filter the records that are being displayed.

Property Name	Type	Usage
		See Construct Text for Filter.

6.4 Timeline Records Report

The component can be added to any lightning record page, home page or app page, and can be used to show the markers of a specific timeline process.

Configuration

Property Name	Type	Usage
Metadata Settings	Text	Reference to configuration that contains all the relevant settings. See section 7.1. In case this setting is set, then it overrides all the other settings.
Timeline Process API Name	Text	API name of the timeline process
Timeline Process Version	Number	Version number of the timeline process
Allow Change Settings	Checkbox	Show/hide button where the view can change the settings.
Layout Mode	Selection	Select between different presentations. Options: ● Wide ● Narrow
Record Field to Display	Text	List of fields to display (use comma separator).
Order By	Text	Field that will be used to sort the table.
Order Direction	Selection	The sorting direction. Options: ● ASC ● DESC
Show Completed Records	Checkbox	Show/hide also completed markers
Pagination Size	Number	Number of records to display per page.
Filter Data	Text	Optional. Provide text value to filter the records that are being displayed. See Construct Text for Filter.

Property Name	Type	Usage
Filer by Running User	Checkbox	If checked, the component will display only records that the viewer owns
Counter Style	Selection	Select between few counter styles

6.5 Timeline Graph Result

The component can be added to any lightning record page, home page or app page, and can be used to show the graphical result of a specific timeline process.

Configuration

Property Name	Type	Usage
Timeline Process API Name	Text	API name of the timeline process
Timeline Process Version	Number	Version number of the timeline process
Page Title	Text	Title for the component
Graph	Selection	Graph to display. Options: ● Markers Average Time ● Markers Completed/Violated ● Markers Close to Violation
Allow Changing Graphs	Checkbox	If true the viewer can change the graph
Bars Type	Selection	Presentation of the bars in the graph. Options: ● Vertical ● Horizontal
Percentage Threshold	Number	The graph Markers Close to Violation will display markers that the percentage of remaining time is lower than this parameter
Graph Width (%)	Number	Width for the graph in percentage (value should be between 1-100)
Graph Height (%)	Number	Height for the graph in percentage (value should be between 1-100)
Group By	Text	Field that will be used for grouping the graph

Property Name	Type	Usage
Allow Changing Group By	Checkbox	If true the viewer can change the group by
Time Measurement	Selection	Options: ● Minutes ● Hours
Sequences to Show	Text	Optional, set specific marker sequences that should be displayed. Use comma separator for several sequences. Leave empty to show all markers.
Background Color	Text	The graph background color. Can use either color name or html code.
Bars Colors	Text	List of colors that will be used for the bars. Use comma separator.
Filter Data	Text	Optional. Provide text value to filter the records that are being displayed. See Construct Text for Filter.
Allow Change Settings	Checkbox	Show/hide button where the view can change the settings.

6.6 Timeline Graph Analyzer

The component can be added to any lightning record page, home page or app page, and can be used to show the graphical result of a specific timeline process time divided by time periods.

Configuration

Property Name	Type	Usage
Metadata Settings	Text	Reference to configuration that contains all the relevant settings. See section 7.1. In case this setting is set, then it overrides all the other settings.
Timeline Process API Name	Text	API name of the timeline process
Timeline Process Version	Number	Version number of the timeline process
Page Title	Text	Title for the component

Property Name	**Type**	**Usage**
Group By	Text	A field that will be used to group the result.
Display Field	Text	When Group By is a reference field, add a field to display from the reference.
Group By (Level2)	Text	Optional. Add the second level of the group by.
Display Field (Level2)		When the Group By (Level 2) is a reference field, add a field to display from the reference.
Aggregate Function	Selection	Function for summarizing the result. Options: ● Count ● Sum ● Max ● Min ● Average
Field for Aggregate Function	Text	When Aggregate Function is other than Count, specific the field that its value should be collected for calculation.
Relevant Date Field	Text	Specify the date field that will be used to divide the data into periods. The default value will be Creation Date.
Group Period	Selection	Period type for the results. Options: ● Year ● Quarter ● Month ● Day
Chart Type	Selection	Type of chart to be displayed. Options: ● Bar ● Stacked Bar ● Line ● Pie ● Donut ● Sunburst ● Table Note that Pie/Donut charts won't display grouping with period.
Show Graph Legend	Checkbox	Hide/show the graph legend.
Switch Mode	Checkbox	When checked the legend values (group

Property Name	Type	Usage
		by) will be replaced with the x-axis values (periods).
Use Horizontal Bars	Checkbox	When the chart type is Bar, check this option to show horizontal bars instead of vertical.
X Axis Label	Text	Optional. Provide label next to the x axis
Y Axis Label	Text	Optional. Provide label next to the y axis
Background Color	Text	The page background color. Can use either color name or html code.
Graph Paper Color	Text	The graph paper color (chart inner section). Can use either color name or html code.
Graph Width (%)	Text	Width for the graph. Can use specific value (e.g 500px) or percentage (e.g 90%).
Graph Height (%)	Text	Height for the graph. Can use specific value (e.g 500px) or percentage (e.g 90%).
Display Fields on Click	Text	Use comma separator for the fields that should be displayed when clicking on a specific section on the graph.
Decimal Places	Number	Number of decimal places to be displayed on numeric results.
Filter Data	Text	Optional. Provide text value to filter the records that are being displayed. See Construct Text for Filter.
Allow Change Settings	Checkbox	Show/hide button where the view can change the settings.

6.7 Markers Analyze Result

Show results from a specific Markers Analyze Job as described in section 7.2 Auto Analyze Markers. The component will always display the latest available result for the job.

Property Name	Type	Usage
Analyzer Process Name	Text	Name of the job that was set up.

7. Manage Timeline Configuration

The tab Manage Timeline Configuration is used to manage the app key settings. The tab contains the following options:

1.**Settings for Markers View -** setup view/report configuration for the different components that were described in section 6 Managed Components to Display Markers.

2.**Auto Analyze Markers** - set automation jobs that analyze the Timeline/Marker results.

3.**Check/Replace Field Usage in Process Configuration** - replace field usage in the Timeline Process configuration.

7.1 Settings for Markers View

Most of the components that were described in section 6 Managed Components to Display Markers have a list of configurations that can be set from the Lighting App Builder. For components that have the property Metadata Settings, this type of configuration can be set up from here.

The main two simple steps are:

1. Create the metadata settings
2. Use the metadata settings name in the Lightning App Builder.

To create the metadata settings, follow these steps:

1. Go to tab **Manage Timeline Configuration**.
2. Click the option **Settings for Markers View**
3. From the drop-down select the type of configuration per the component that you want to use.
4. Click the button **Create New Settings?**
5. Setup the relevant configuration according to the screen and the requirements
6. Click Save. Once the save completes, you can use the settings name inside the Lighting App Builder for the relevant component type.

7.2 Auto Analyze Markers

1. Go to tab **Manage Timeline Configuration**.
2. Click the option **Auto Analyze Markers.**
3. Click the button **New Job**
4. Choose what this job should analyze. It can be either:
   - Marker - analyze specific marker
   - Timeline Process - analyze all the markers in specific Timeline Process
   - Object - analyze all the Timeline Process/Markers for specific object type
5. Additional settings:
   - Analyze Items - set of jobs to analyze:
     - Completion Time - check the markers average completion time.

        - Overdue Time - check the markers average overdue time.
        - Completion Hours - analyze in which time usually markers being completed
        - Violation Percentage - check the percentage of violations/completions markers
        - Record Activities - search correlation between activities in the record to the marker's completion.
    - Add Field to Analyze - set of fields to check how they impact on the Analyze Items.
    - Analyze Specific Markers - (optional) set filter to run the process only on specific markers.
    - Start At - when this job should be running.
    - Repeated Every # Days - repeated days interval
    - Get Output by Email - check this option to receive the analyzer result by email.
    - Insight - check this option to write the analyzer result into the markers records.
6. Click the button **Save** to schedule the job.

7.3 Check/Replace Field Usage in Process Configuration

In several sections the application setup contains reference fields in your organization.
For that reason, after renaming fields it is necessary to update the application with the change.

After renaming field that is being used by the application, do the following:

1. Go to tab **Manage Timeline Configuration**.
2. Click the option **Check/Replace Field Usage in Processes Configuration.**
3. Using the dropdown select the object type and write the field that was renamed.
4. Click the button **Analyze Current Usage**.
5. The output will display all the usage of the fields by the application configuration.
6. Using the dropdown select the update field, and click the button **Update.**

This action will update all the configuration to use the new field name.