

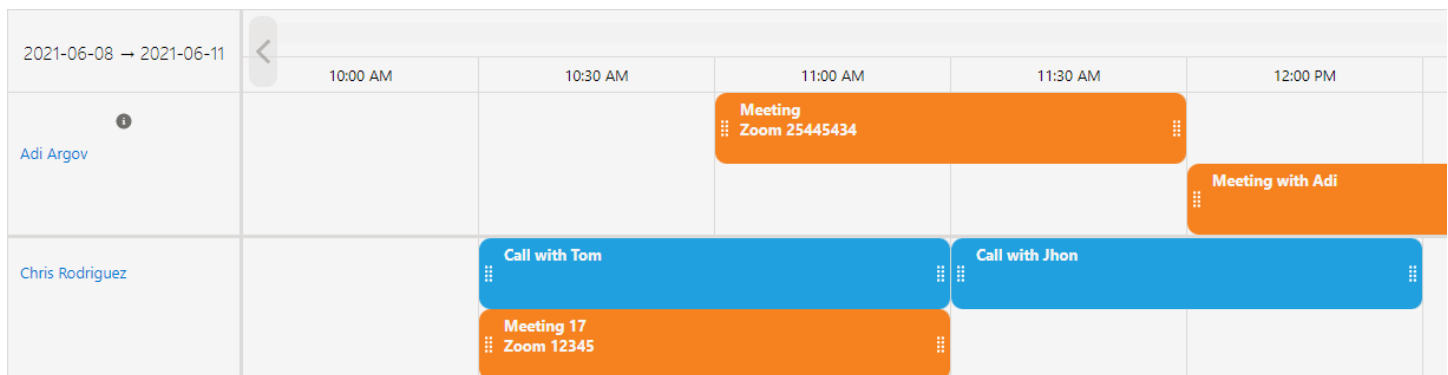
Native Planner High Level Overview

The Native Planner component is used with two objects - the “parent” and the “child”. These objects do not have to be related to each other through a lookup or a master-detail relationship.

Think of the “child” object as any object whose records you want to see on a chart (i.e. start and end dates, etc), and the “parent” object as the object that you want to use to group the “child” records by.

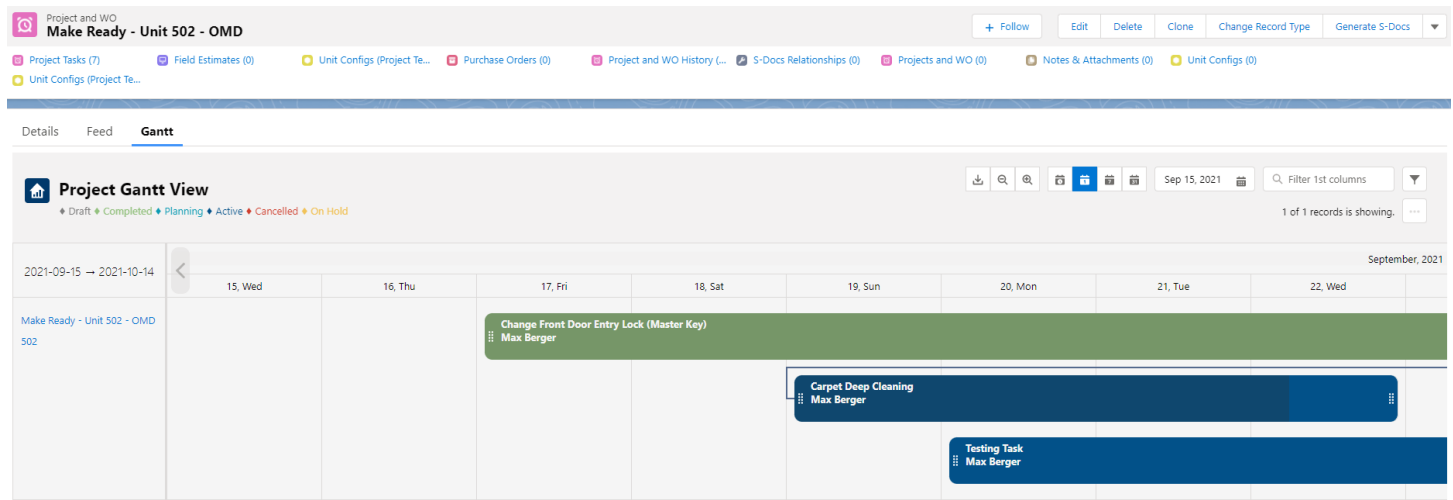
For example, if you want to see a high-level view of your projects and associated tasks, the “parent” is Projects, and the “child” is Tasks. If you want to see a list of all the tasks that individuals are assigned, the “parent” is Users, and the “child” is Tasks.

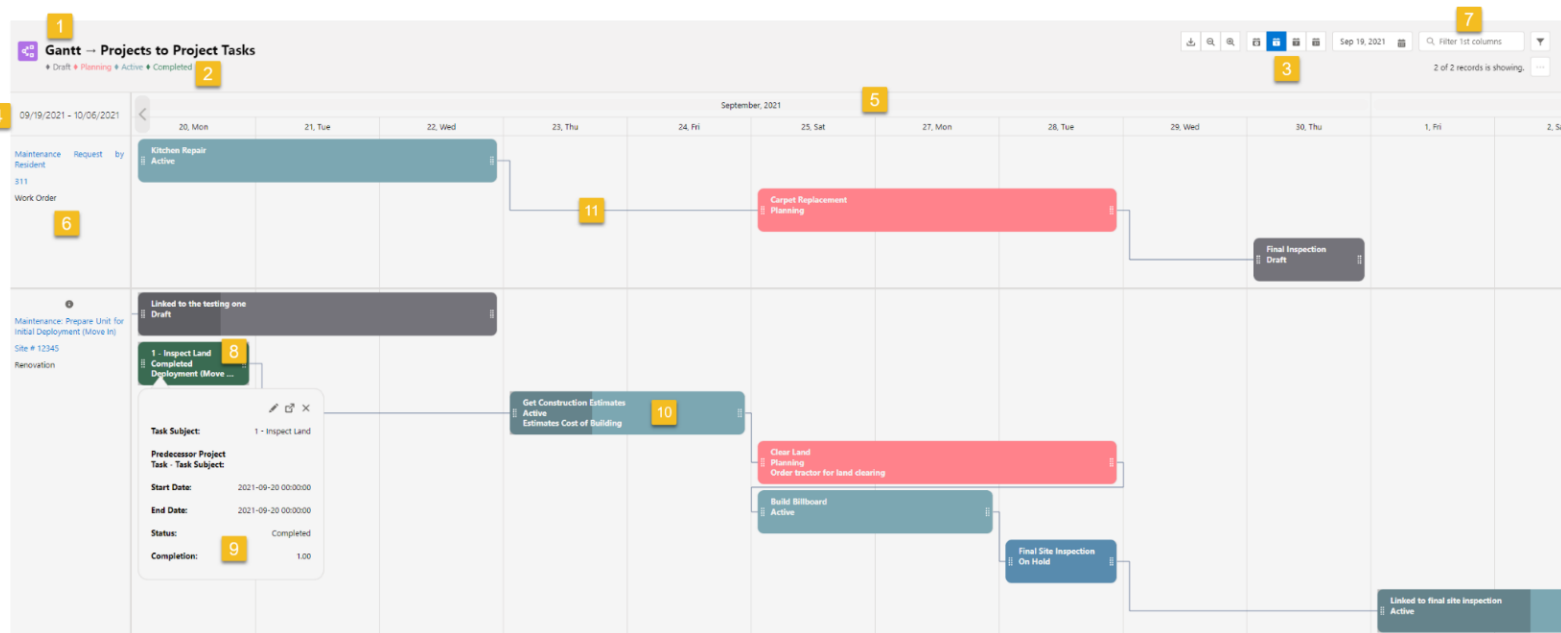
There are two chart types - Gantt and Scheduler. Gantt is used when there is a dependency between two “child” records, such as a predecessor task. Scheduler is used when there is no need to show the relation between “child” records. The “child” records can be overlapped (i.e. placed next to one another) only in a Scheduler.



If you place the Native Planner component on a record-detail page, you can filter the “parent” object based on the page record ID. To do this, you need to specify what “parent” field you want to filter by (i.e. what field should equal the page record ID).

For example, if you place the component on a Project page, and want to see the Tasks assigned to each User, you could choose to filter the Tasks by the Project record ID.





Native Planner Component Customization

1 - Title Display	Field	Values	Description	Example
	Component Title	Text	Chart Title up to 200 characters	Sample Chart
	Component Title Size	Integer (12 - 32)	Font size of the chart title	22
	Component Icon	Picklist	Icon to the left of the title - the picklist supports any icons from the lightning design system	EVENT
2 - Legend (If you opt to use this, it will show up below)	Component Icon Size	Picklist	Icon size can be customized to small / medium / large	MEDIUM
	Component Show Colors Legend	Picklist	This is a picklist (Yes/No) that controls if you want to display the legend or not. If you want to show the legend, you need to configure the next two fields properly.	Yes
	Child Color Field	Text	This is the field that'll be used to control the colors. It is a text field that contains the sObject's field name (ex. Status__c).	Status__c
3 - Scale & Loading	Child Color Matrix	Text	This is an array of keys and values that will control the color for various field values. It is a text field, but the formatting of it should be as follows: [{'key': '1st Child Color Field Value', 'value': 'red'}, {'key': '2nd child color field value', 'value': '#404040'}]	[{'key': 'Draft', 'value': '#74737a'}, {'key': 'Planning', 'value': '#ff828b'}, {'key': 'Active', 'value': '#7CA7B2'}, {'key': 'Completed', 'value': '#3E8461'}]
	Component Timeline Scale	Picklist	Default timeline scale to use (Day / Hour / Week / Month)	Day
	Component Load More Scale	Integer (5 - 50)	Breaks the data load into chunks, and define the number of Parents records to load at once (The min of 5 and max of 50).	5

4 - Timeline	Component Start Date	TODAY / MM/DD/YYYY	The date from which chart starts	
	Component End-In Days	Integer (10 - 45)	Range of component, the number of days to show on the component from start date. (Ex – 10 days after Today)	10
	Component End-In Weeks	Integer (7-14)	Week scale range, the number of weeks to show from start date.	7
	Component End-In Months	Integer (6-12)	Month scale range, the number of months to show from start date (12 will show the entire year after start date)	6
	Component Start Time	Picklist	The Starting hour/time in the Hour scale (Can be match with office opening hours 8:00am)	08:00 AM
	Component End Time	Picklist	The End hour/time in the Hour scale (Can be match with office closing hours 5:00pm)	05:00 PM
	Component Time Scale	Picklist (HH/MM/etc)		
	Component Day Scale	Integer (3 - 7)	The number of days showing under Hour time scale	3
5 - View Days	Component Opt-Out Days	Text	Days that should not be displayed on the chart	SATURDAY, SUNDAY
6 - Parent Details	Parent Field	Text	Field that will be used as a parent sObject	Project__c
	Component Use Page Record Id	Picklist	Filter the parent records by the page record Id	YES
	Parent Record Id Field	Text	Specified field to be used as filter for the parent sObject with the Page Record Id (Can use other fields in the record besides RecordID)	AssignID
	Parent Left-Side Fields	Text	Sequence of field names to be used with parent object (separated by commas)	Name, Unit__r.Name
7 - Filter	Parent Search Fields	Text	Define a sequence of field names to be used with the parent sObject (Separated by commas) - This will be used to filter the main column and the advanced filter screen. [Filter by fields]	Approval_Status__c
	Parent Filter Statement	Text	Define a filter statement to be used with the specified child object [Ex. ID, RecordType, etc.]	Id = 'a0K1U000004K6aU UAS' OR Id = 'a0K1U00000Arfw7U AB'
8 - Child Fields	Child Field	Text	Define a field to be used as a child sObject	Project_Task__c
	Child Custom Relationship	Picklist	Use a child sObject to use a custom relationship with the parent sObject (the child custom relationship field must be filled properly in case this option is set to yes)	NO

	Child Custom Relationship Field	Text	Define a field to be used as a relationship in situations where the specified parent has no directly connection to the child.	OwnerId
	Child Title Fields	Text	Define a sequence of field names to be displayed on the child bar (separated by a comma; if more than 3, they will be shown in a popup box)	Name, Status__c, Completion__c
	Child Start Field	Text	Define a field to be used as the start date of the specified child sObject	Start_Date__c
	Child End Field	Text	Define a field to be used as the end date of the specified child sObject	End_Date__c
	Child Filter Statement	Text	Define a filter statement to be used with the specified child sObject	
9 - Details Pop Up	Child Popup Fields	Text	The field must be properly set with a scale of 0 - 1. Define a field to be used with the child sObject to show progress.	nativeerp__Completion__c
10 - Child Interactivity	Child Can Overlap	Picklist	Can the child record overlap with another child record? (This can only be set to YES if the Chart Type is SCHEDULER)	NO
	Child Read Only	Picklist	If the child is read-only, the user will not be able to drag and drop the child records around on the chart.	NO
	Child Progress Field	Text	The field must be properly set with a scale of 0 - 1. Define a field to be used with the child sObject to show progress.	nativeerp__Completion__c
11 - Child Linking	Child Link Field	Text	Define a field to be used as a link/path between records of the specified child object	Predecessor_Project_Task__c