Sage People

Lightning App Builder

Lightning App Builder is a brilliant way to transform your Sage People pages with engaging content.

Sage

Table of Contents

What is Lightning App Builder? Making Sage People Engaging 3

Transforming Sage People 3

How to create a new record page? 4

How would I like my Record page to look? 7

How to add a Highlights Panel to the Record Page 7

How to add Tabs to the Record Page 8

How to add Related Lists to the Record Page 14

Adding a Rich Text Banner 15

Activating your New Record Page 17

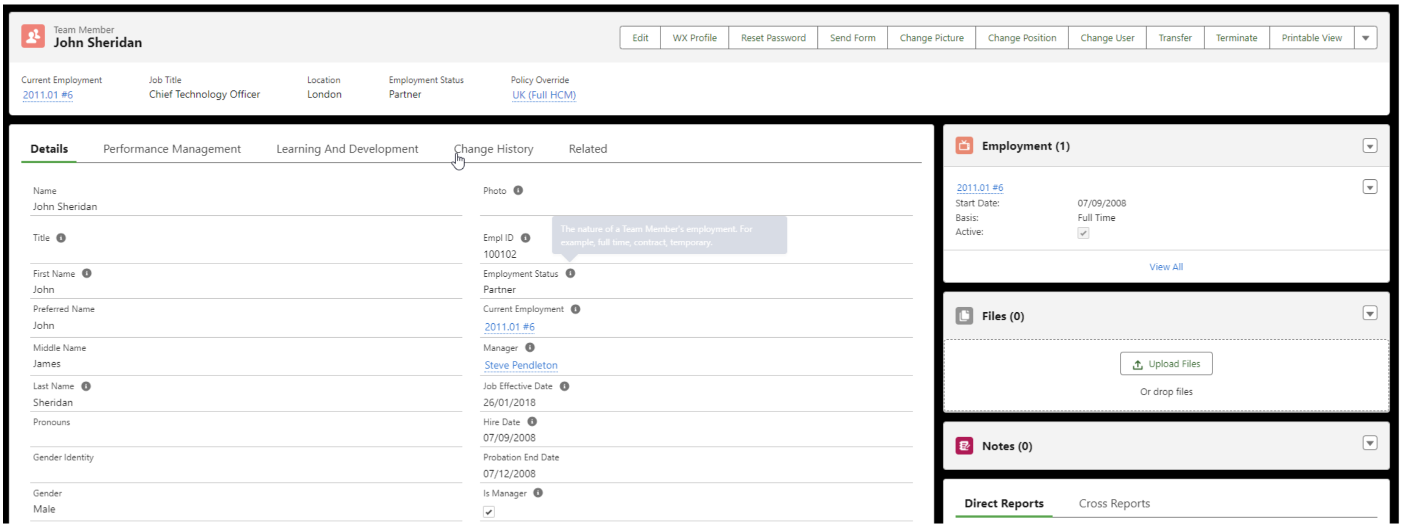
What is Lightning App Builder?

Making Sage People Engaging

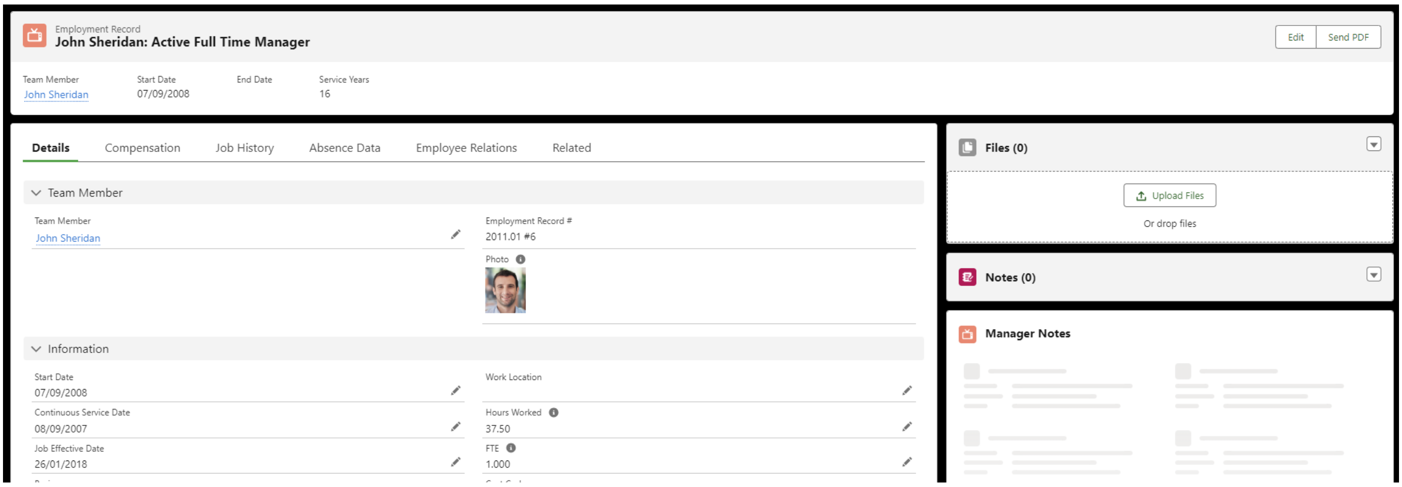
Transforming Sage People

Moving to Lightning allows you to also update your Homepage and record page layouts to ensure that you have the information you need at your finger tips by using the Lightning App Builder. Different Homepages and record pages can be created for different apps e.g. HCM Lightning or Recruit Lightning or different profiles e.g. HR Manager or Recruiter.

New Record Page Example



Team Member



Employment

How to create a new record page?

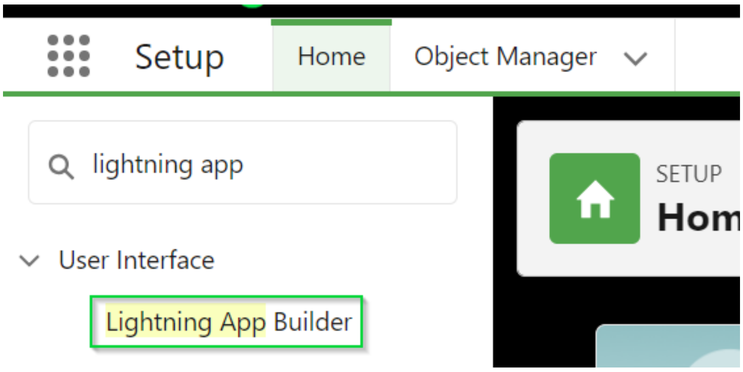
Record pages should be the one stop shop to enable users to have access to team member and employment information conveniently and effectively. Think about the information these different users need:

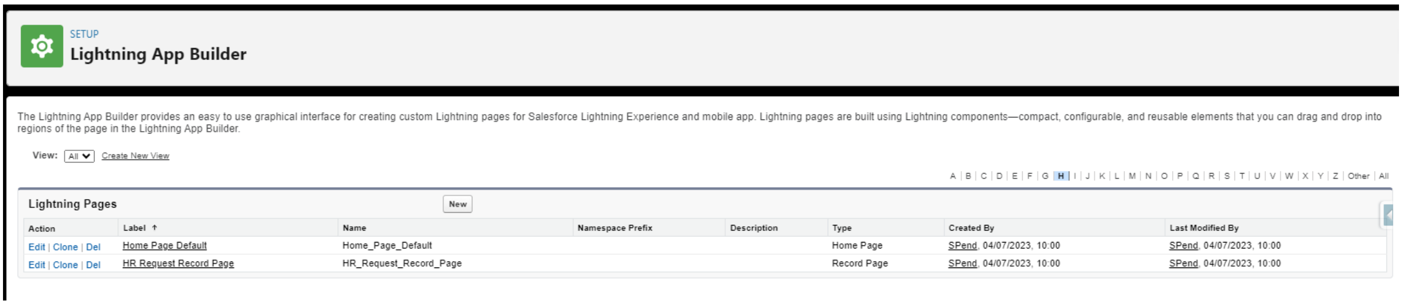
- What team member information do they need to see?
- What related lists are useful?
- Would grouping areas like performance reviews and objectives together help?
- What about grouping all of your absence information?
- Which quick links do they need?

You can create a custom Record Page in a few different ways: Create it from scratch using a template, clone it from another custom Record Page, or edit a page from the Record Tab in a Lightning app.

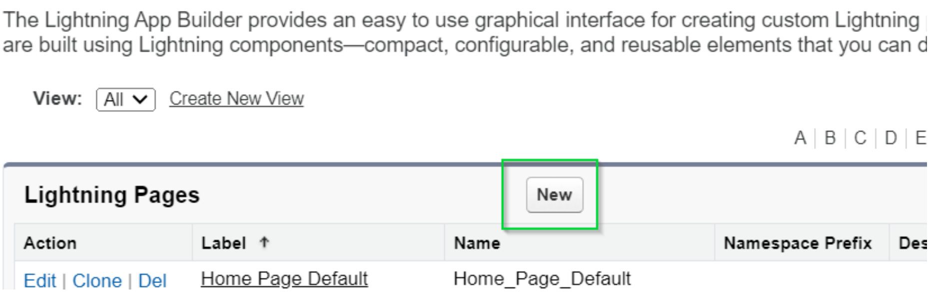
To edit an existing page, you can click from the Record page, and then select Edit Page to create a copy of the current page to edit. If a customized page exists and is active, selecting Edit Page opens that page to edit.

Or click and select 'Setup' and from the Quick Find, enter 'Lightning App Builder'.



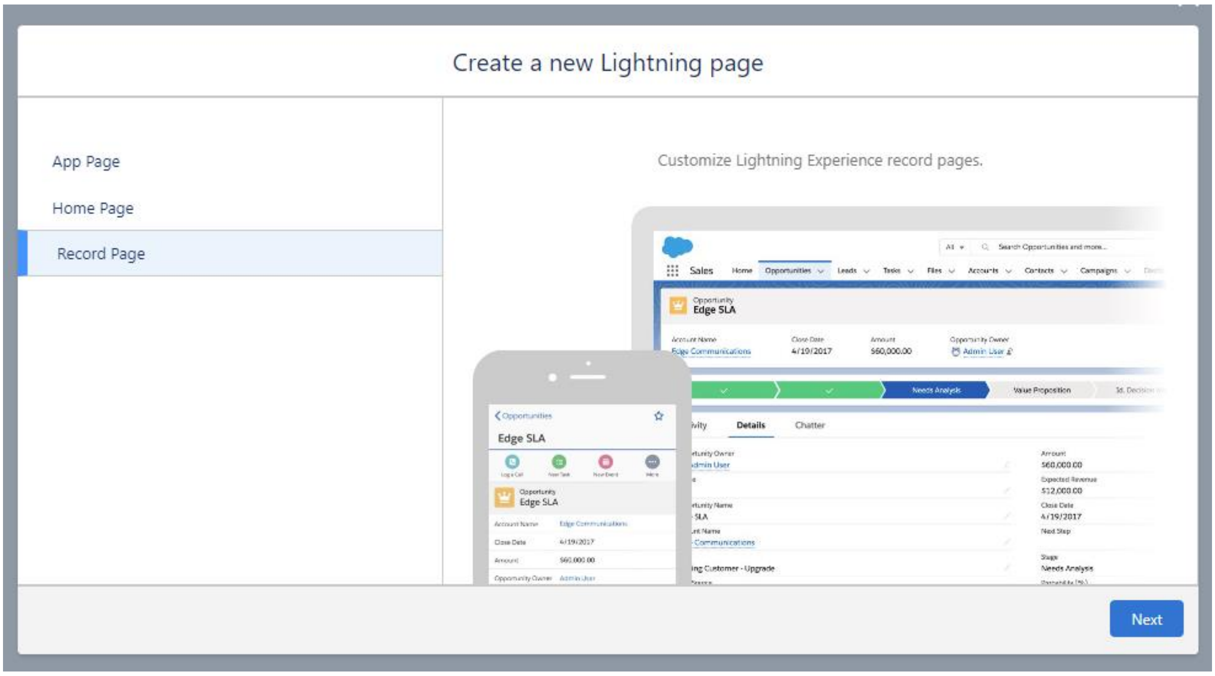


Click **‘New’.**

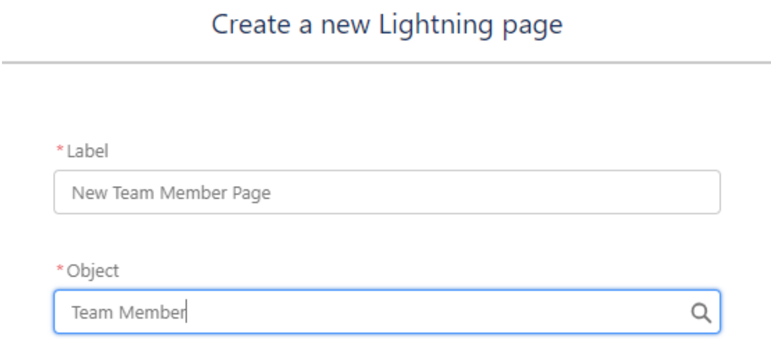


Recommendation: You can update the current Record Page(s) but always clone first and rename.

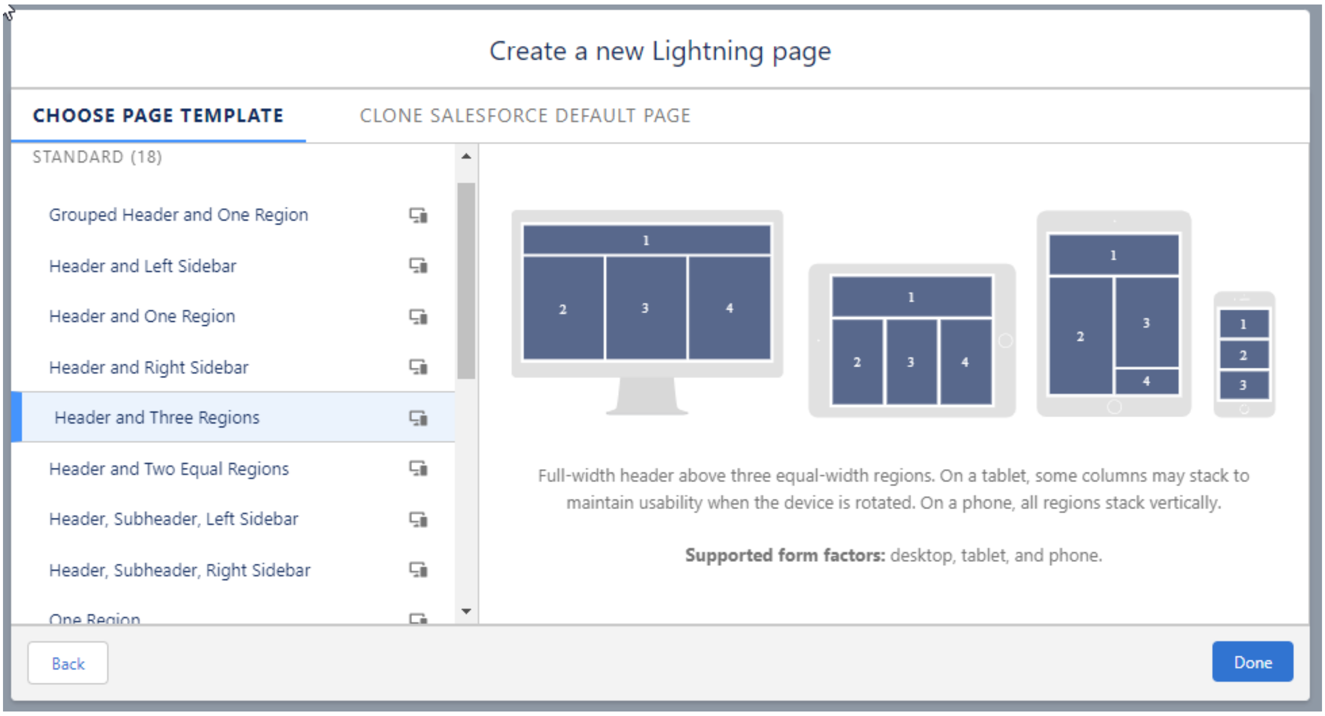
Select **‘Record Page’** and then click **‘Next’**



Enter a new name in the label field e.g. New Team Member Page, select the Object e.g. Team Member then click **‘Next’.**

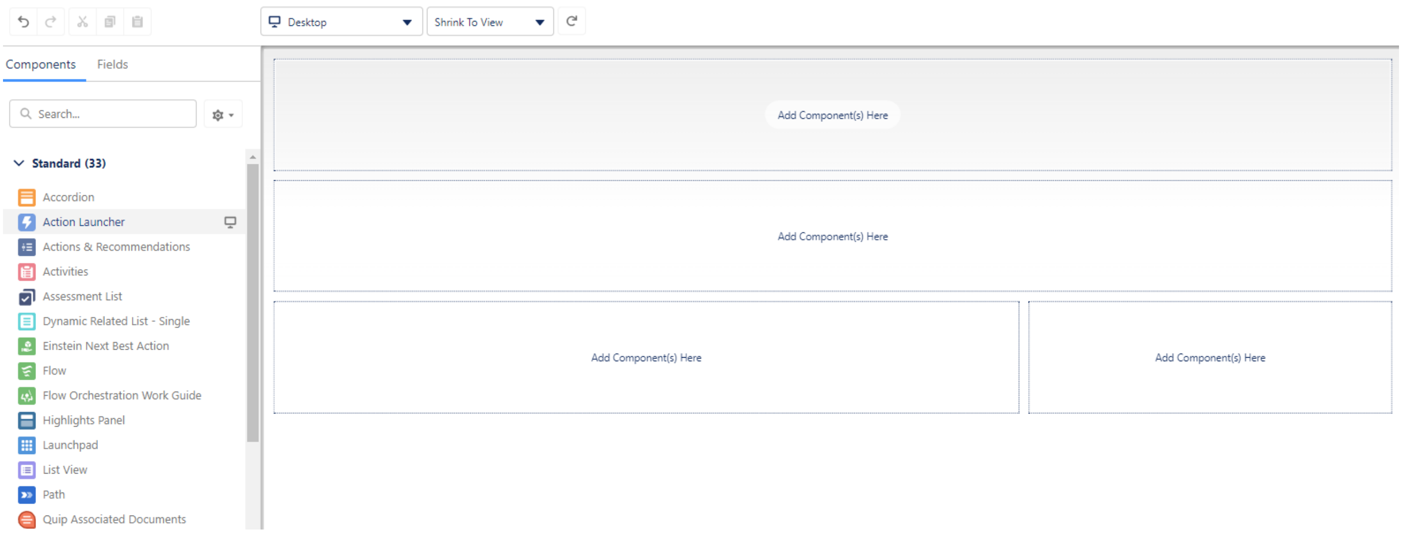


Select your Page Template – We would recommend Header, Subheader, Right Sidebar. Then click **'Done'.**



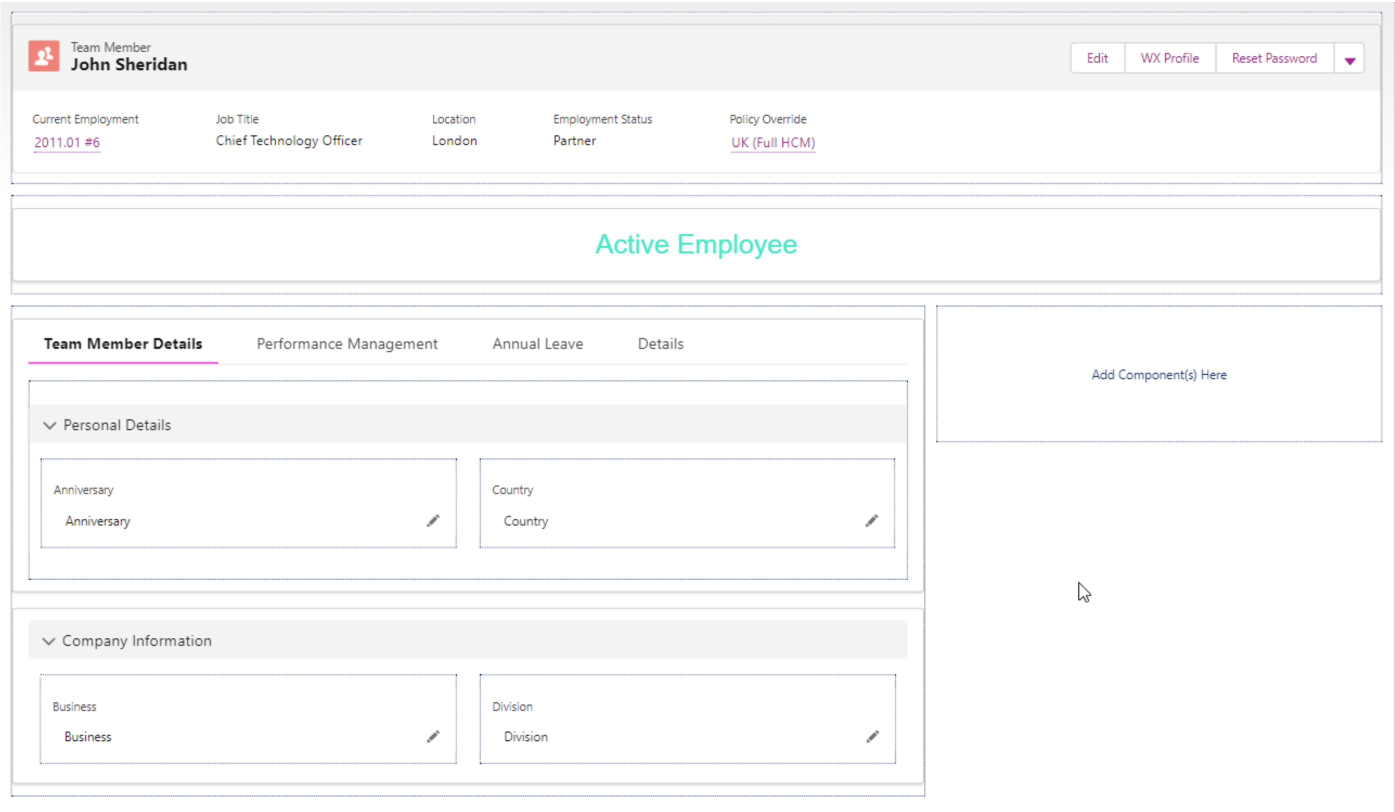
Congratulations you have created your new Record Page (Team Member)!!!

You will now have the below screen and you can continue on to the next step.



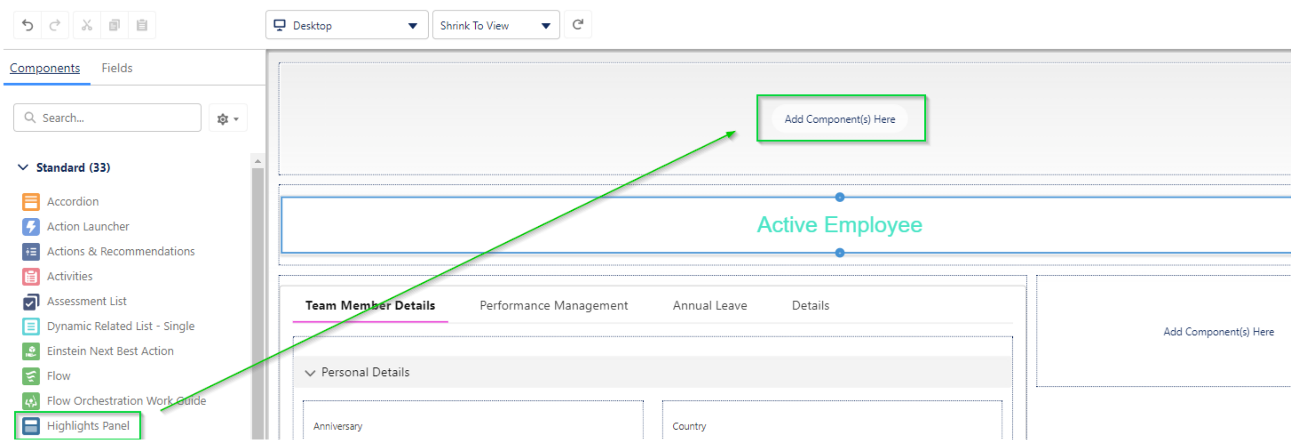
How would I like my Record page to look?

The first step in creating your new record page is to decide how you would like your information displayed. For this example, we will be creating a new Team Member record page. There are different options and text that you can add. Below is an example, we will be walking through how to create each of the items.



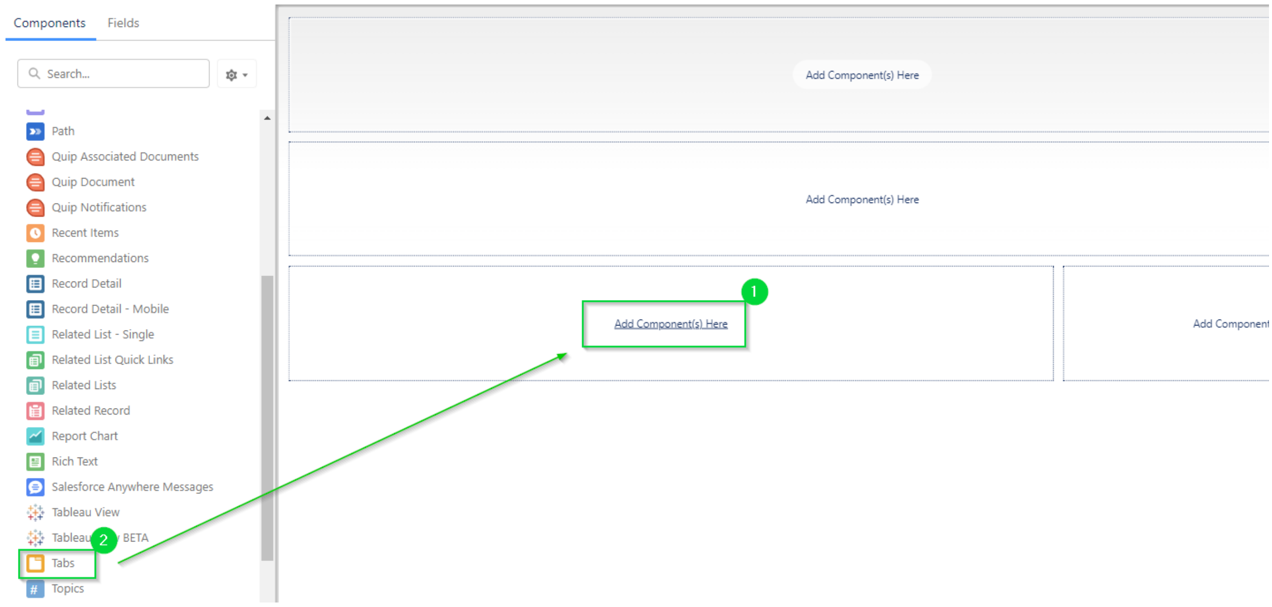
How to add a Highlights Panel to the Record Page

In the very top section of the page layout, click on ‘Add Component(s) Here’. Then from the ‘Components’ List, drag over the ‘Highlights Panel’.

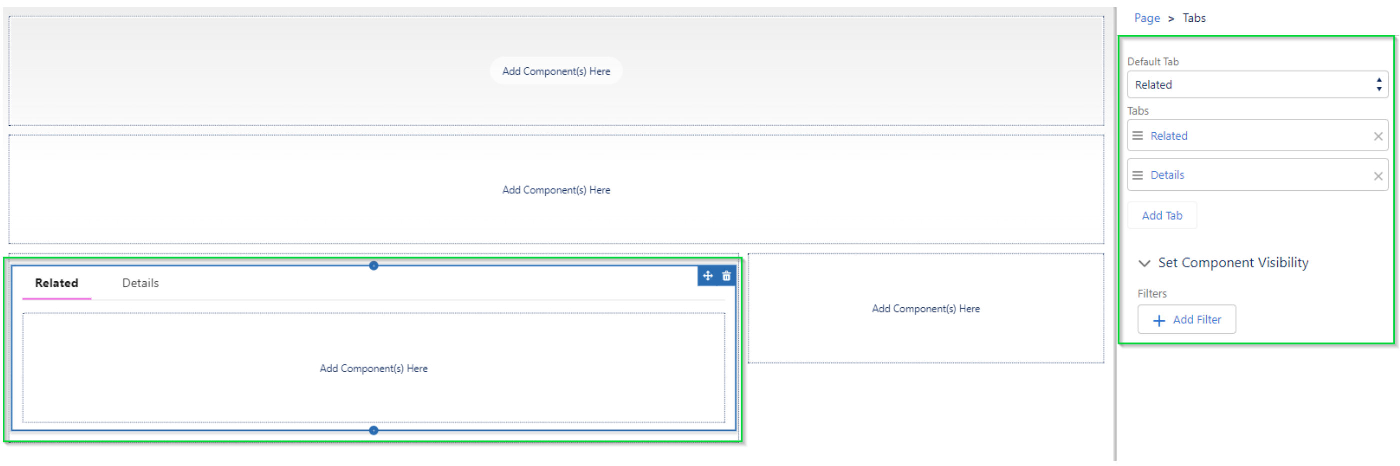


How to add Tabs to the Record Page

You can add in ‘Tabs’ to your page, this means you can section up your information. You will need to select, ‘Add Component(s) Here’ and then drag over the ‘Tab’ option from the list of standard components.



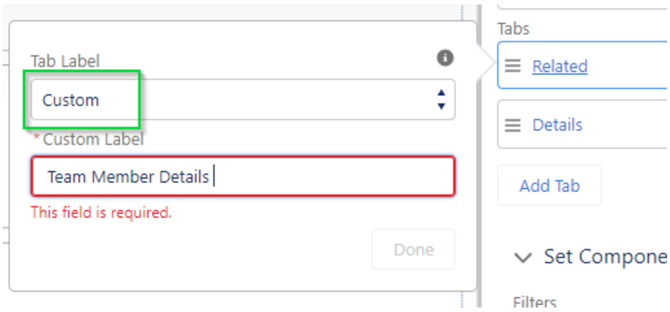
You will now see that the tab section has been created, and you can start to customise this. Click on the component to highlight it, and you will notice on the right hand side options appear to add new tabs and rename tabs.

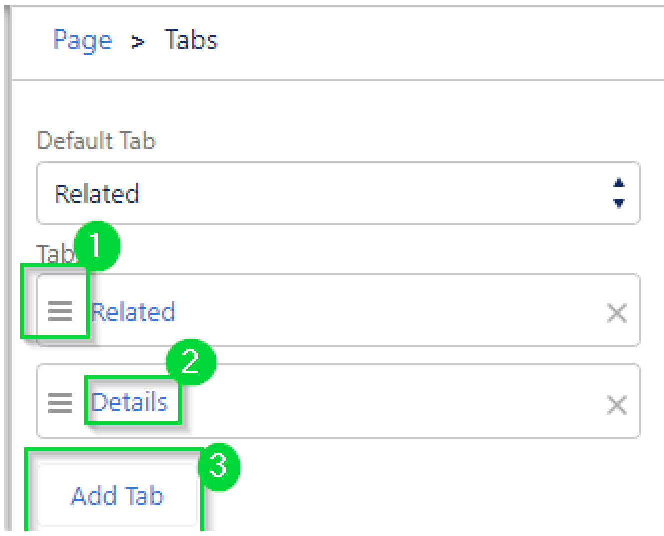


You are going to be focusing on the options on the right hand side to build out your tab structure.

1. You can use the three lines to drag up and down to set the order.

2. Click the name of the tab to rename. Change the **'Tab Label'** to Custom and then add in your new title.





3. Click this to add a new Tab.

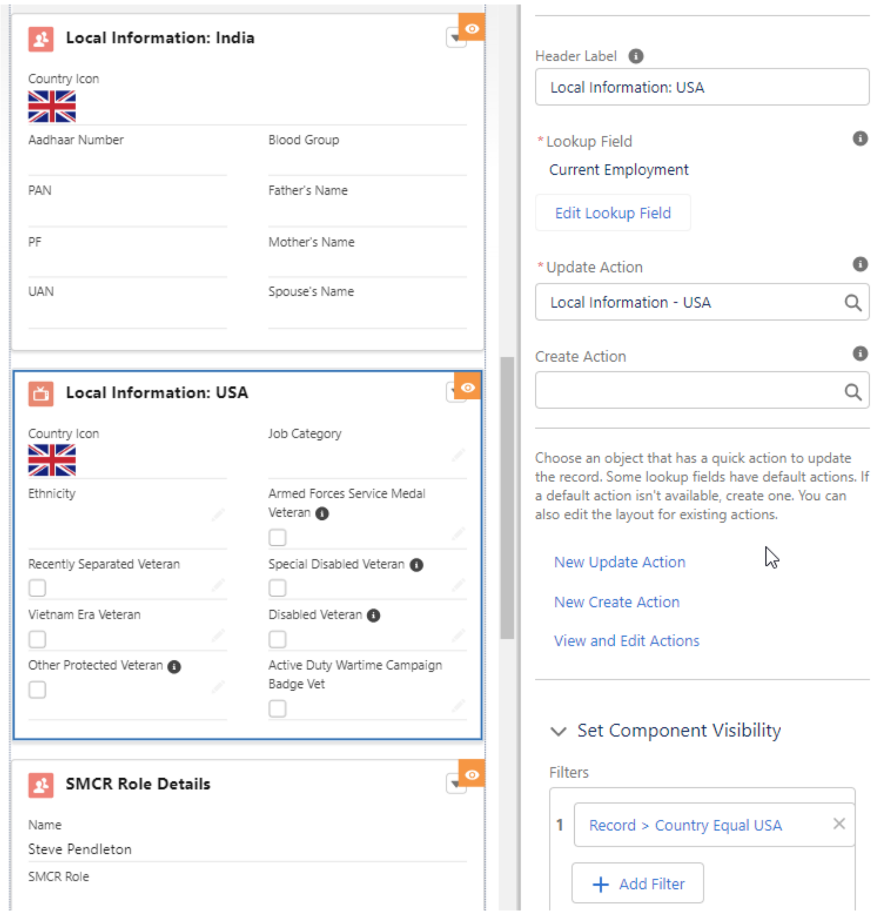
You can then start adding in components such as fields and related lists.

Individual Fields VS Page Layout (a Group of Fields).

In the next section you will be adding your fields to the Record page that you would like to be shown. You are able to do this in two ways:

- **Record Detail** – this pulls fields from the page layout on the relevant object. Meaning you would manage adding any new fields in the current way and it would pull on to the lightning page.
- **Individually adding the fields** – this is a longer way to add the fields to your page BUT it allows you to **'Set Field Visablity'** , meaning you can add filters to the fields to only show to certian people (example below).

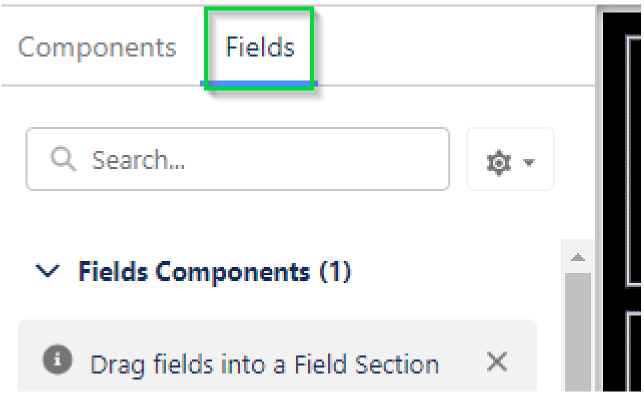
The local information section is only shown if the person looking at the record has their **country equal to USA**. You are able to set this per invidual field and/or section.



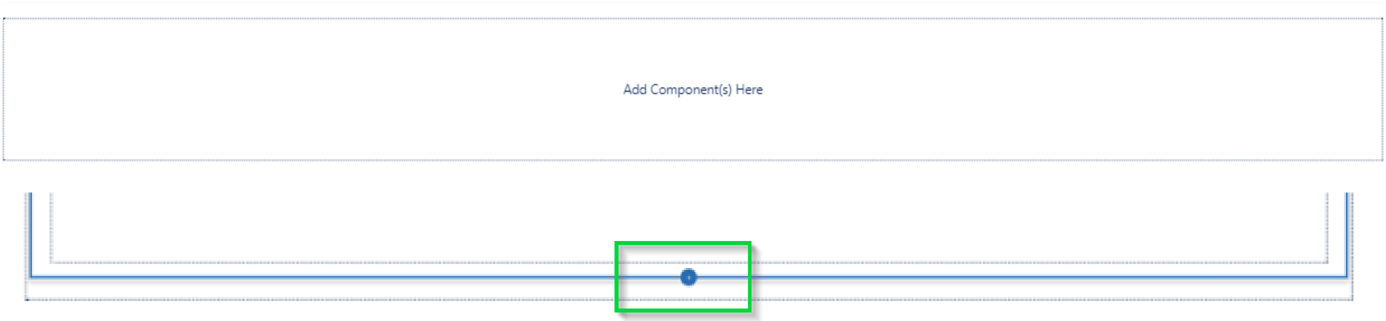
Adding Fields (Individually)

Select the relevant tab you would like to add your fields to and then follow the steps below:

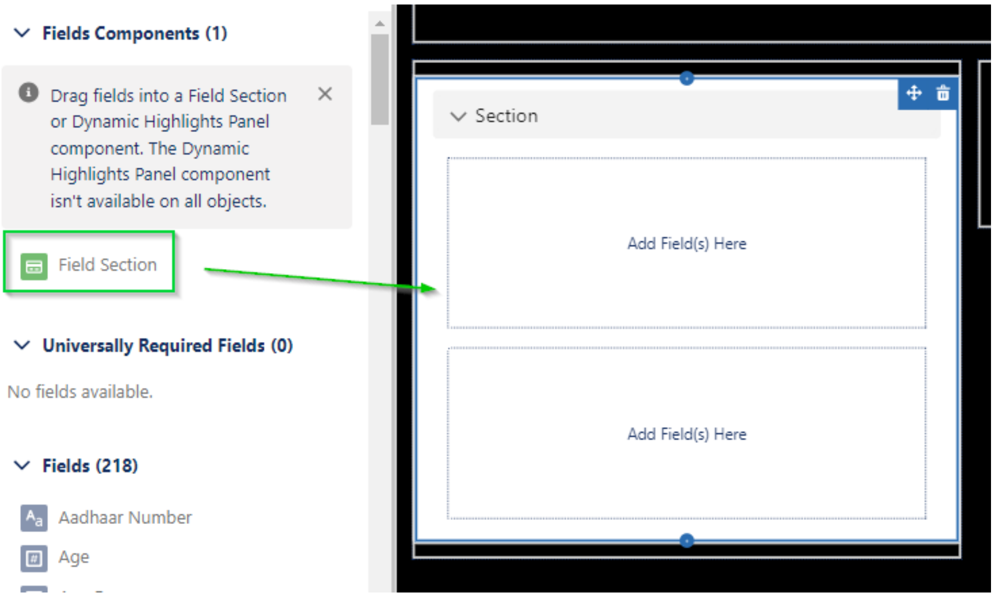
On the right hand side, you will need to select **'Fields'.**



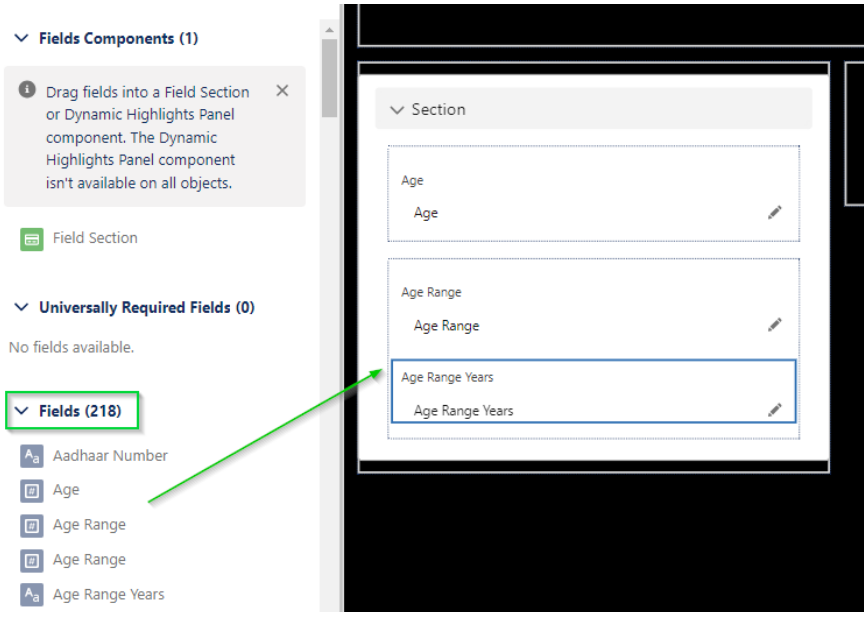
You will then need to click '**Add Component(s) Here**' on the section you would like to start adding fields. Then click the blue '**+**'.



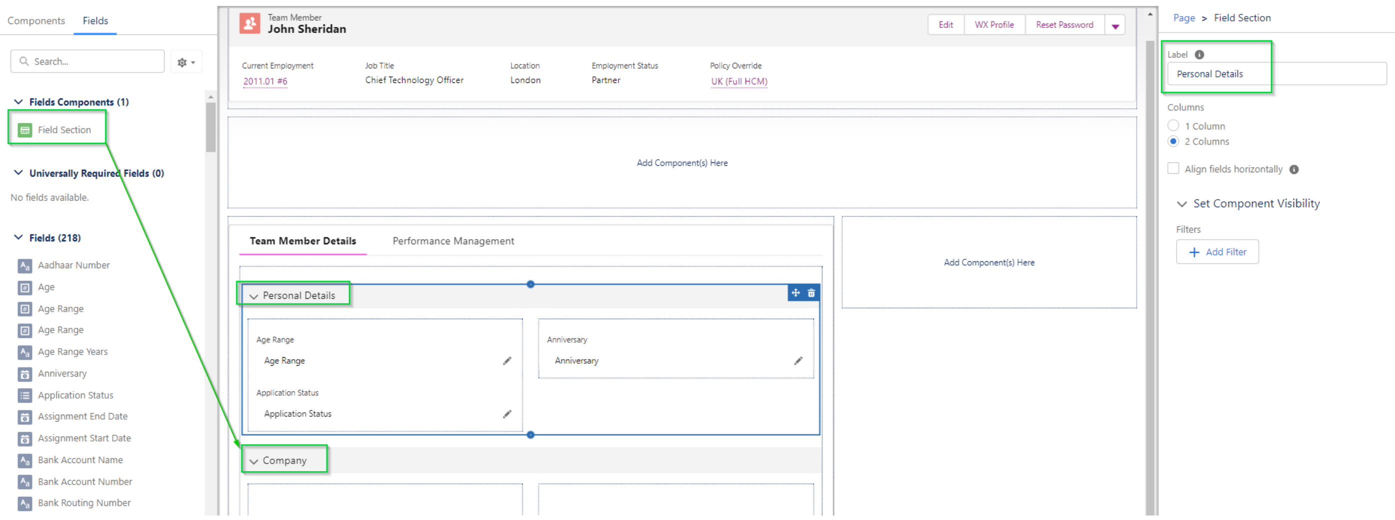
You can then drag the **'Field Section'** option into the section area.



You can then drag the fields you want to include into the field section.



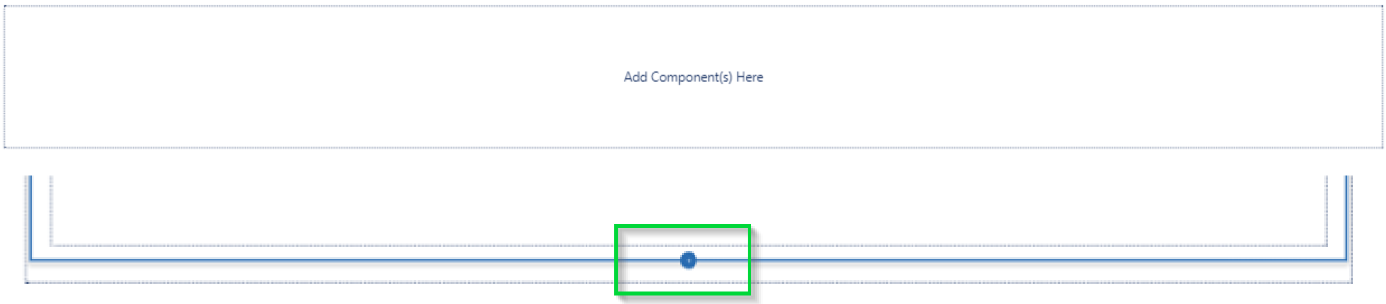
To create a new section, simply drag and drop the **'Field Section'** under the last one, on the right hand side; you then have the option to rename the section as shown below:



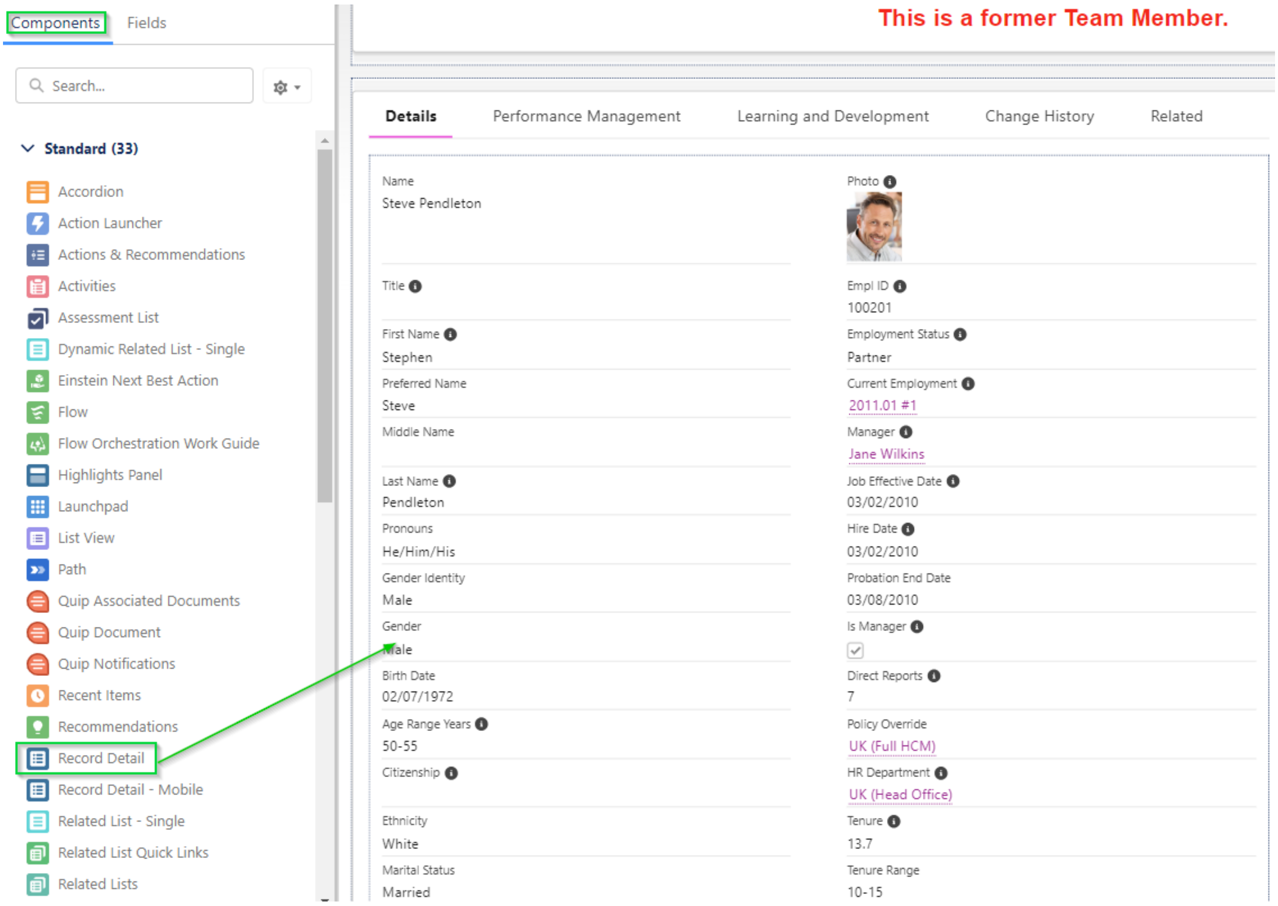
Adding Fields (Utilising Page Layout)

Select the relevant tab you would like to add the **'Record Detail'** to, this will pull from your **'Page Layout'** on the relevant object.

You will then need to click '**Add Component(s) Here**' on the section you would like to start adding fields. Then click the blue '**+**'.

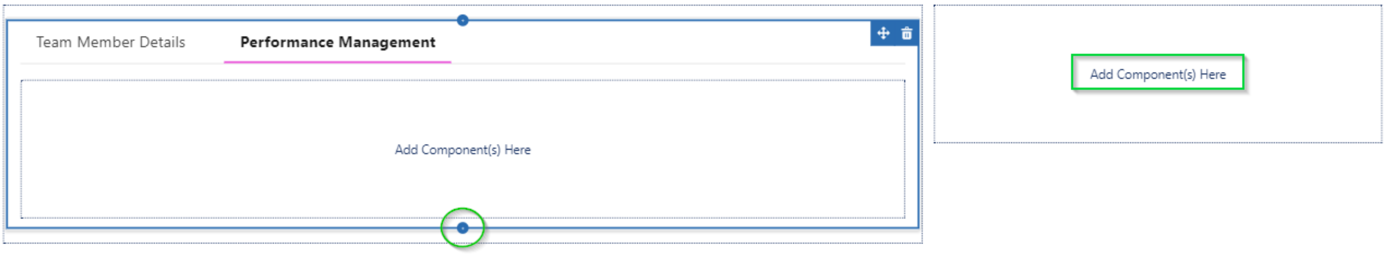


From the 'Components' section, drag over the 'Record Detail' option, this will the populate the section with all the relevant fields as one block.

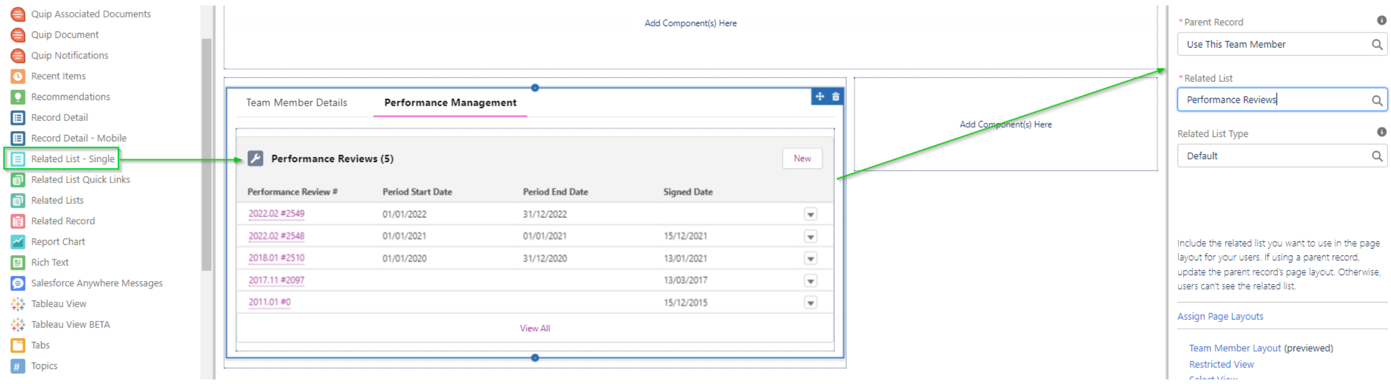


How to add Related Lists to the Record Page

Select the tab or location of your related list, if needed select the **‘+’** or **‘Add Component(s) here’** depending on the positioning of your related list.



Under the **‘Components’** option, select **‘Related List – Single’** and then drag and drop in your desired location.



Once you have put the component in place, on the right hand side you will then need to select the relevant related list you want to show.

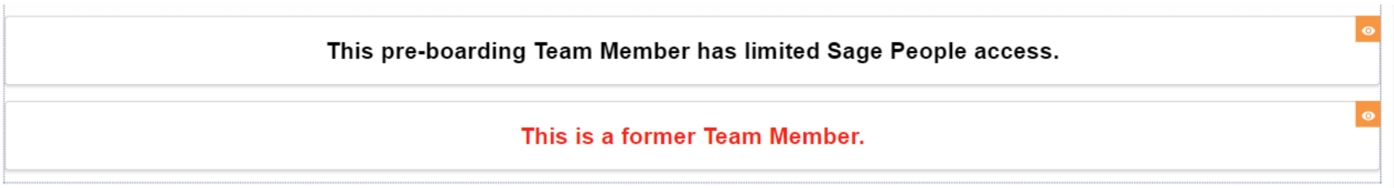
You can add the related list under your newly created tabs or in the side bar for quick naviagation.

Adding a Rich Text Banner

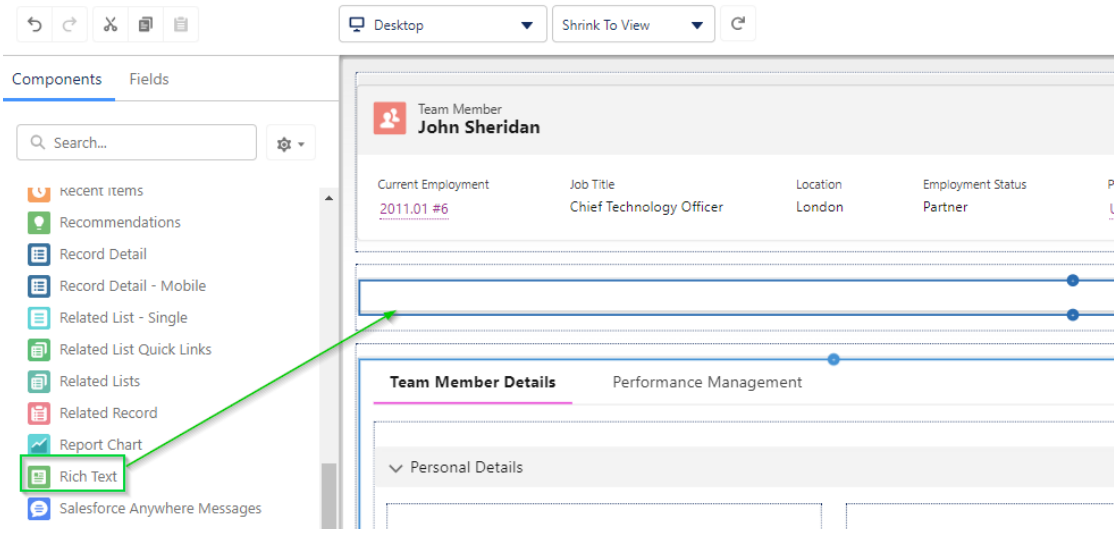
A great feature of using lightning app builder is you can add text to show on your Record Page. For example you could set a banner to show for pre-joiners, leavers and active employees, so its instantly clear the status of the employee.

You would set up a formula within the ‘Rich Text’ to show this for different types of employee.

EXAMPLE:



To add ‘Rich Text’, you will need to Select the tab or location of your related list, if needed select the **‘+’ or ‘Add Component(s) here’** depending on the positioning of your **‘Rich Text’** component.

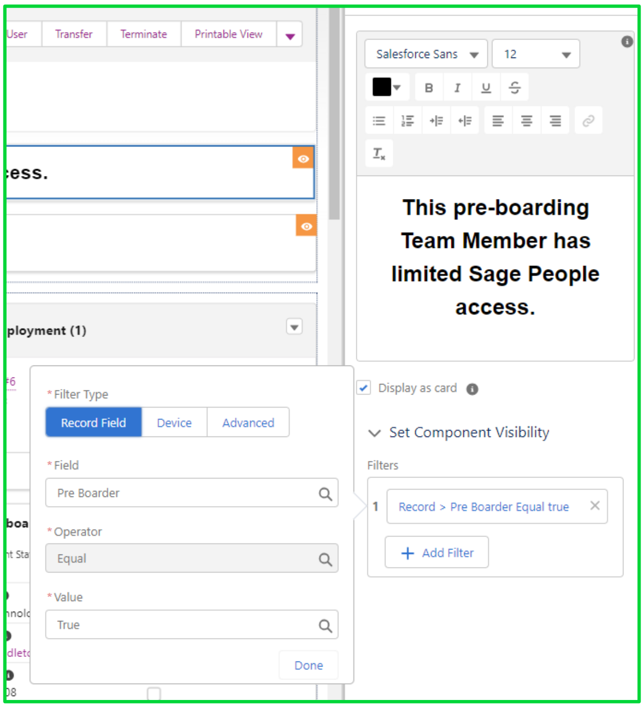


You can then follow each of the steps below or create your own!

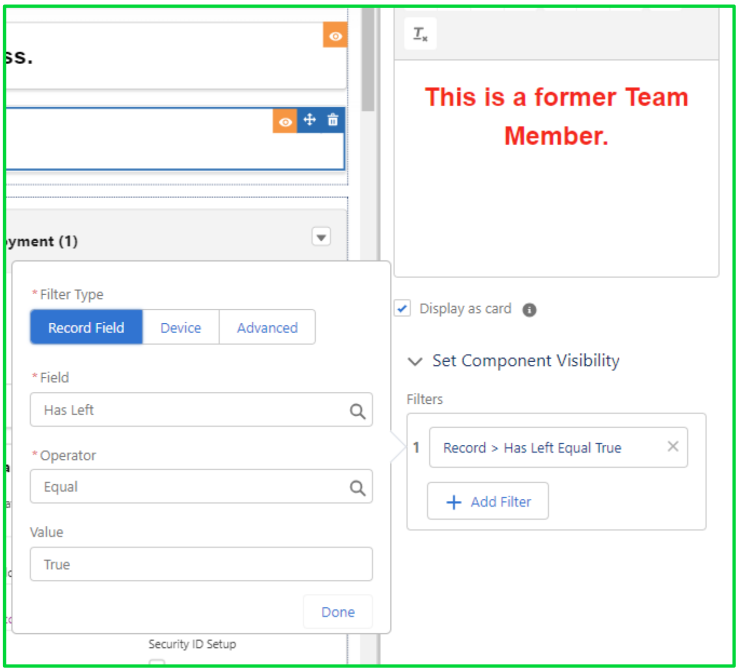
Pre Joiner & Leaver

In the text box, add in the wording and format how you would like it to appear on the Team Member record. You can then click **'Add Filter'** under **'Set Component Visibilty'** and when this is shown. In the example below we have used the a pre boarder field to evaluate if it should be shown or not and the same for a leaver using the 'Has Left' field.

Pre Joiner

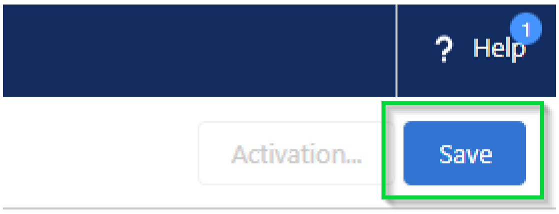


Leaver

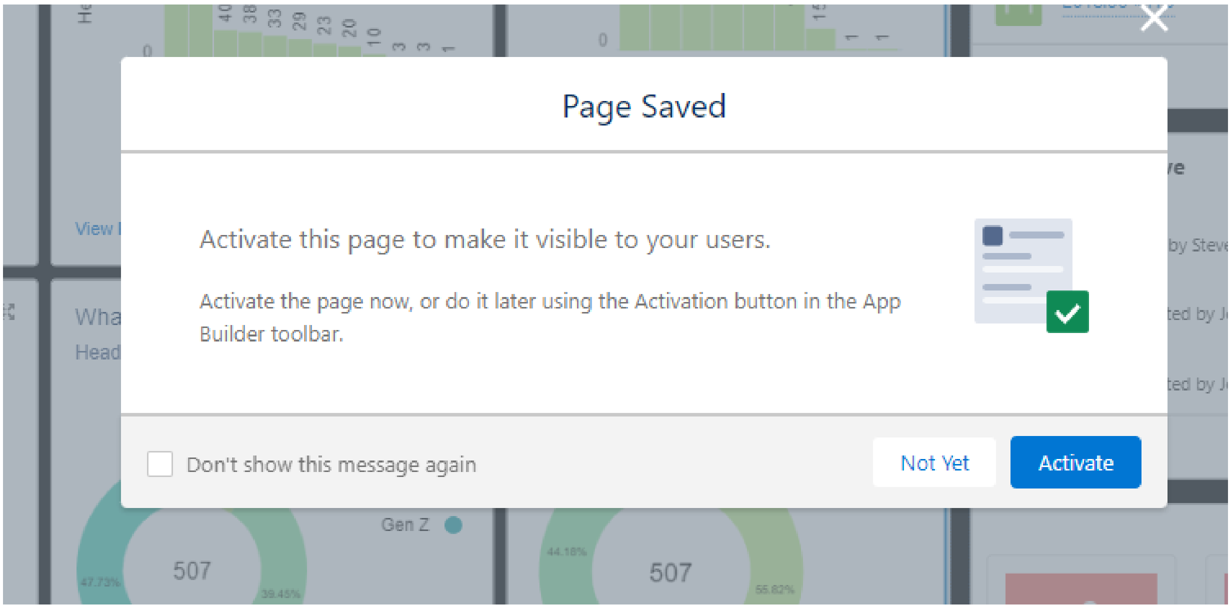


Activating your New Record Page

You will now be able to Save and Activate you new Record Page. Click **'Save'**.

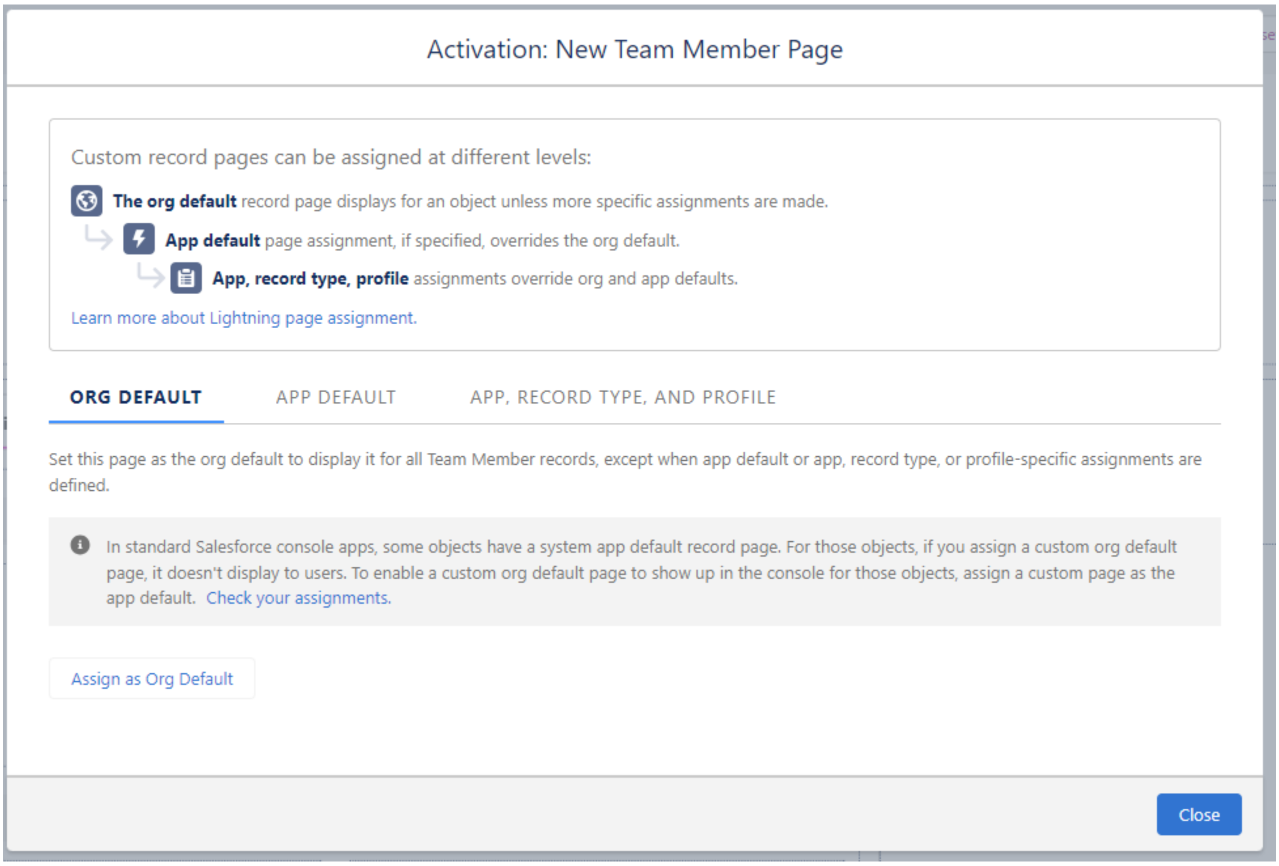


You will recieve the following message:



If you are not ready to activate click **'Not Yet'** and the Record page will be saved but won't be live (activated).

If you would like your Record page to be available to users click **'Activate'.**



You have the option to assign as the org default, therefore all users will see the new record page or you can activate just for a certain App.

For example, **App Default** e.g. HCM Lightning, Recruit Lightning or for **App and Profile** e.g HCM Lightning app and HR Manager Profile or Recruit Lightning app and Recruit Administrator profile.

Once you have set your assignments please ensure you click **'Save'**.

Now you are ready to test with a user who meets the assignment criteria.

Well done!!

Useful Links here:

[Top Tip - Lighning app builder - Homepage.pdf | Powered by Box]
[Lightning App Builder | Salesforce Trailhead]
[Build a Custom Record Page for Lightning Experience and Salesforce]

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