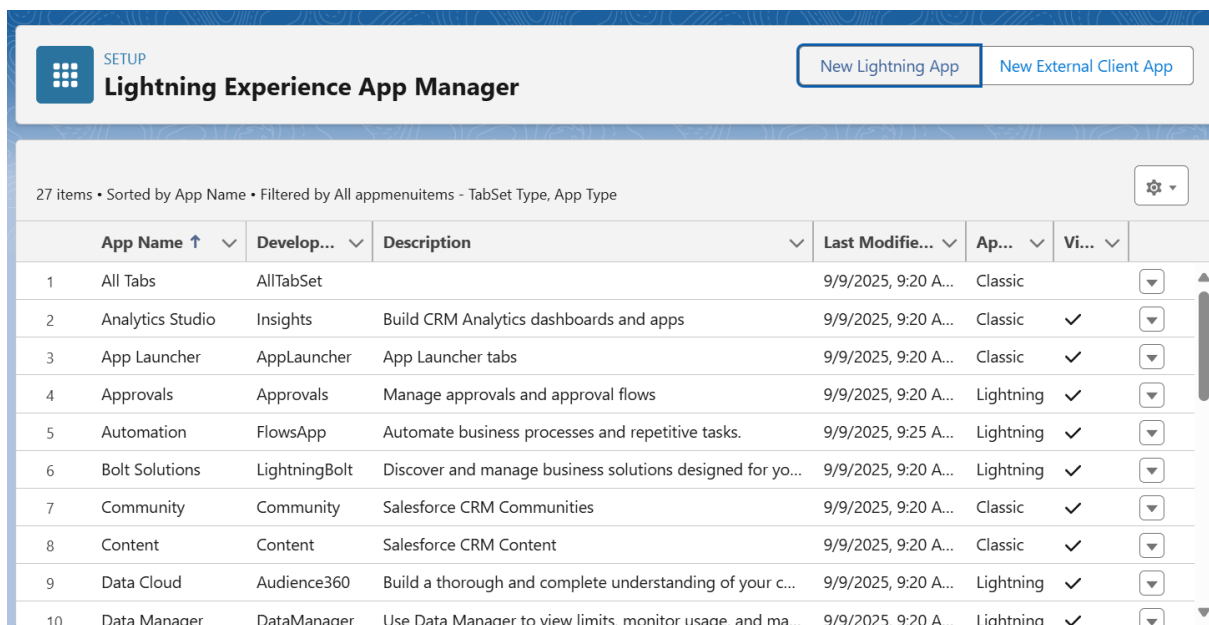# Phase 6: User Interface Development

Objective

The objective of this phase is to design and configure user-friendly interfaces in Salesforce for managing the *Employee Onboarding & Training Tracker*. Using Lightning App Builder, Page Layouts, and Quick Actions, the system is made intuitive for HR Managers, Training Admins, and Employees.

6.1 Lightning App Creation

- **App Name:** Employee Onboarding Tracker

- **Navigation Items:** Employee, Onboarding Task, Training Module, Reports, Dashboards

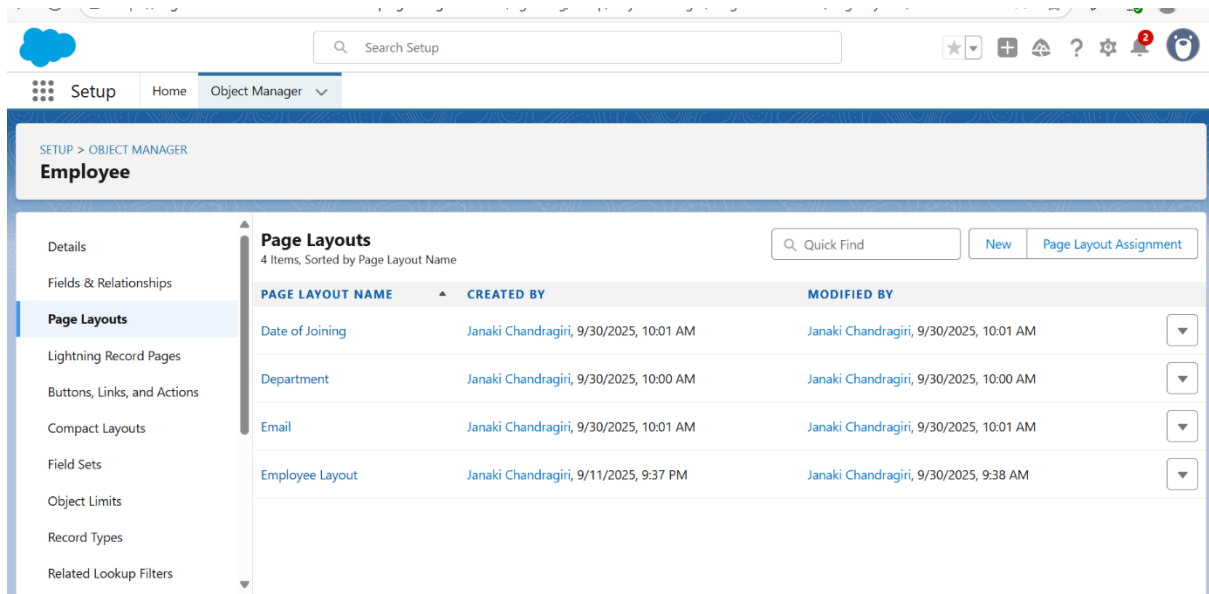- **Assigned To Profiles:** System Administrator, HR Manager

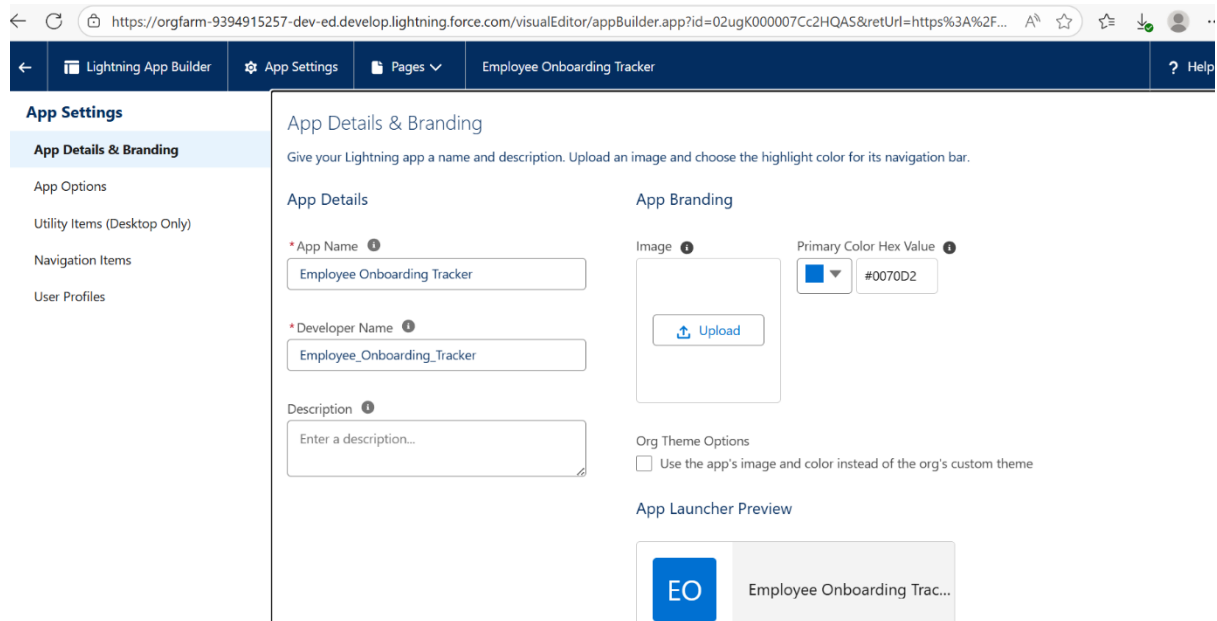|	App Name ↑ ∨	Develop... ∨	Description ∨	Last Modifie... ∨	Ap... ∨	Vi... ∨	
1	All Tabs	AllTabSet		9/9/2025, 9:20 A...	Classic		▼
2	Analytics Studio	Insights	Build CRM Analytics dashboards and apps	9/9/2025, 9:20 A...	Classic	✓	▼
3	App Launcher	AppLauncher	App Launcher tabs	9/9/2025, 9:20 A...	Classic	✓	▼
4	Approvals	Approvals	Manage approvals and approval flows	9/9/2025, 9:20 A...	Lightning	✓	▼
5	Automation	FlowsApp	Automate business processes and repetitive tasks.	9/9/2025, 9:25 A...	Lightning	✓	▼
6	Bolt Solutions	LightningBolt	Discover and manage business solutions designed for yo...	9/9/2025, 9:20 A...	Lightning	✓	▼
7	Community	Community	Salesforce CRM Communities	9/9/2025, 9:20 A...	Classic	✓	▼
8	Content	Content	Salesforce CRM Content	9/9/2025, 9:20 A...	Classic	✓	▼
9	Data Cloud	Audience360	Build a thorough and complete understanding of your c...	9/9/2025, 9:20 A...	Lightning	✓	▼
10	Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and ma...	9/9/2025, 9:20 A...	Lightning	✓	▼

Page Layout Configuration

- **Employee Layout:**
  - Added fields: Email, Department, Date of Joining.
  - Added related lists: Onboarding Tasks, Training Assignments.
  - Organized into sections: Employee Info, Onboarding, Training.

- **Onboarding Task Layout:**
  - Fields: Task Status, Due Date, Related Employee.

- **Training Module Layout:**
  - Fields: Training Type, Duration, Description

Lightning Record Page Customization

- **Employee Record Page:**
    - Components: Highlights Panel, Related Lists (Onboarding Tasks & Training Assignments), Report Chart (Onboarding Status).
    - Activated for app and profile.

Quick Actions

- Created a Quick Action on **Employee** to quickly assign an onboarding task.
- Action Type: Create Record → Target Object: Onboarding Task.
- Added to Employee Lightning Page actions.

Page Saved

Activate this page to make it visible to your users.

Activate the page now, or do it later using the Activation button in the App Builder toolbar.

☐ Don't show this message again

Not Yet **Activate**

User Testing

- Opened the **Employee Onboarding Tracker App**.

- Verified:

  ○ Employee record displays Onboarding Tasks and Training Assignments.

  ○ Quick Action "Assign Task" visible.

  ○ Dashboard chart embedded and showing status summary.

Outcome of Phase 6

The *Employee Onboarding & Training Tracker* now has a fully customized user interface. HR Managers can easily view employee details, track onboarding tasks, assign training, and monitor overall onboarding progress from a single Lightning App.