

## Phase 3: Data Modelling & Relationships

Title :- Employee Onboarding and Training Tracker using Salesforce CRM

### 1. The Core Objective

In Phase 2, we created the foundational custom fields for Employee, Training Module, and Onboarding Task. In Phase 3, the focus is on building the data model and relationships that connect these objects, ensuring that onboarding and training processes are not only tracked but also interconnected.

### 2. Why Data Modelling Matters

Without proper data relationships, employee onboarding and training remain siloed. Salesforce enables:

- Centralized View – All employee, training, and onboarding task data in one place.
- Traceability – HR can track which employees are linked to which training modules and onboarding tasks.
- Scalability – Junction objects allow handling many-to-many relationships, e.g., employees attending multiple trainings.
- Efficiency – Page layouts and compact layouts make it easier to view and manage critical details.

### 3. Objects and Fields Created

Standard Object Used:

- Contact → Used to represent employees.

Custom Objects Created:

- Employee – Stores employee details.
- Training Module – Defines training courses/modules.
- Onboarding Task – Tracks onboarding-related activities.
- Assignment (Junction Object) – Links Employees ↔ Training Modules (many-to-many).

Phase 2 Fields Recap:

- Employee: Name, Email, Department, Date of Joining
- Training Module: Training Type, Duration, Description
- Onboarding Task: Task Status, Due Date, Related Employee (Lookup)

Phase 3 Extension:

- Assignment (Junction Object): Employee (Lookup), Training Module (Lookup)

### 4. Record Types

To support categorization, record types were created:

1. Mandatory Training – Compliance and policy modules.
2. Optional Training – Skills development and elective modules.

### 5. Page Layouts

Layouts were designed for ease of use:

- Employee Layout: Employee details, related tasks, assigned trainings.

- Training Module Layout: Training details, related employees.
- Onboarding Task Layout: Task status, due date, and employee linkage.

## 6. Compact Layouts

Compact layouts help HR quickly see:

- Employee: Name, Department, Email, Date of Joining.
- Onboarding Task: Task Status, Due Date, Related Employee.

## 7. Relationships

Defined key relationships in Salesforce:

- Onboarding Task → Employee (Lookup)
- Assignment → Employee & Training Module (Many-to-Many)
- Employee → Training Module (via Assignment)

## 8. Schema Builder View


Using Salesforce Schema Builder, the model now clearly shows:

- Employee ↔ Onboarding Task (One-to-Many)
- Employee ↔ Training Module (Many-to-Many via Assignment)

## 9. What We've Achieved in Phase 3

By the end of Phase 3, we have:

- A fully defined data model linking employees, onboarding tasks, and training modules.
- Junction object (Assignment) enabling many-to-many relationships.
- Page and compact layouts to improve usability.
- A schema view that provides visual clarity for stakeholders.



Search Setup

★

+

🔒

?

⚙️

🔔<sup>2</sup>

Setup

Home

Object Manager

SETUP > OBJECT MANAGER

Employee

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Object Access

Triggers

Details

Description

API Name

Employee\_\_c

Custom

✓

Singular Label

Employee

Plural Label

Employees

Enable Reports

✓

Track Activities

✓

Track Field History

✓

Deployment Status


Deployed

Help Settings

Standard salesforce.com Help Window

Edit

Delete



Setup

Home

Object Manager

Search Setup

Star

Plus

Refresh

Help

Settings

Notifications

SETUP > OBJECT MANAGER

Training Module

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Object Access

Triggers

Details

Description

API Name

Custom

Singular Label

Plural Label

Training Module\_c

✓

Training Module

Training Modules

Enable Reports

Track Activities

Track Field History

Deployment Status

Help Settings


✓

Deployed

Standard salesforce.com Help Window

Edit

Delete



Search Setup

★

+

🏠

?

⚙️

🔔<sup>2</sup>

Setup

Home

Object Manager ▾

SETUP > OBJECT MANAGER

Onboarding Task

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Object Access

Triggers

Details

Description

API Name

Onboarding\_Task\_\_c

Custom

✓

Singular Label

Onboarding Task

Plural Label

Onboarding Tasks

Enable Reports

✓

Track Activities

✓

Track Field History

Deployment Status

Deployed

Help Settings

Standard salesforce.com Help Window

Edit

Delete

SETUP > OBJECT MANAGER

Employee

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Object Access

Triggers

Fields & Relationships

8 Items, Sorted by Field Label

New

Deleted Fields

Field Dependencies

Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Date of Joining	Date_of_Joining__c	Date		
Department	Department__c	Picklist		
Employee Email	Employee_Email__c	Email		
Employee Name	Employee_Name__c	Text(100)		
Employee Name	Name	Text(80)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓

Training Module

- Details
- Fields & Relationships**
- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Restriction Rules
- Scoping Rules
- Object Access
- Triggers

Fields & Relationships

7 Items, Sorted by Field Label

New

Deleted Fields

Field Dependencies

Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Description	Description__c	Long Text Area(1000)		<div>▼</div>
Duration	Duration__c	Number(3, 2)		<div>▼</div>
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Training Module Name	Name	Text(80)		✓ <div>▼</div>
Training Type	Training_Type__c	Picklist		<div>▼</div>

Onboarding Task

- Details
- Fields & Relationships
- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Restriction Rules
- Scoping Rules
- Object Access
- Triggers

Fields & Relationships

7 Items, Sorted by Field Label

Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Due Date	Due_Date__c	Date		
Last Modified By	LastModifiedById	Lookup(User)		
Onboarding Task Name	Name	Text(80)		✓
Owner	OwnerId	Lookup(User,Group)		✓
Related Employee	Related_Employee__c	Lookup(Employee)		✓
Task Status	Task_Status__c	Picklist		



# Schema Builder

Close

Auto-Layout

View Options

Elements

Objects

Select objects to display on the builder.

Select from All Objects

Quick Find

☐ Location Group

☐ Location Group Assignment

☐ Location Shipping Carrier Method

☐ Macro

☐ Messaging Session

☐ Messaging User

☐ Object Milestone

☒ Onboarding Task

☐ Operating Hours

☐ Operating Hours Holiday

☐ Opportunity

☐ Opportunity Contact Role

☐ Opportunity Product

☐ Orchestration Run

☐ Orchestration Run Log

☐ Orchestration Stage Run

☐ Orchestration Step Run

☐ Orchestration Work Item

☐ Order

Employee	
Created By	Lookup(User)
Date of Joining	Date
Department	Picklist
Employee Email	Email
Employee Name	Text(30)
Employee Name	Text(100)
Last Modified By	Lookup(User)
Owner	Lookup(User+1)

Training Module	
Created By	Lookup(User)
Description	Long Text Area(1000)
Duration	Number(2, 2)
Last Modified By	Lookup(User)
Owner	Lookup(User+1)
Training Module Name	Text(30)
Training Type	Picklist

Onboarding Task	
Created By	Lookup(User)
Due Date	Date
Last Modified By	Lookup(User)
Onboarding Task Name	Text(50)
Owner	Lookup(User+1)
Related Employee	Lookup(Employee)
Task Status	Picklist