ERM Hybrid Workforce Project – Phase 4

Phase 4: Process Automation (Admin)

1. Validation Rules

Analytics Metric

- **Ensure_all_critical_fields_are_filled** – Validates all required fields before saving.
- **Source_Must_Be_Selected** – Ensures a data source is provided.
- **Status_Cannot_Be_Blank** – Prevents records without a status.
- **Metric_Name_Cannot_Be_Blank** – Ensures metric is properly named.
- **Value_Cannot_Be_Blank_or_Negative** – Validates metric value is filled and greater than zero.

Hybrid Schedule

- **Prevent_Duplicate_Schedules_for_Same_Date** – Stops employees from having multiple schedules on the same date.
- **Prevent_Scheduling_in_the_Past** – Disallows creating schedules in past dates.
- **Restrict_Remote_Office_Field_Selection** – Ensures valid selection between remote/office work.
- **Restrict_Scheduling_on_Weekends** – Prohibits schedules on weekends.
- **Start_Time_End_Time_Status** – Validates logical order of start and end times.

Validation Rules
5 Items, Sorted by Rule Name

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY	
Employee_Must_Be_Selected	Employee	"Please select the employee for this survey."	✓	Venkata Balaji Sai R, 9/23/2025, 7:52 AM	▼
Feedback_Text_Cannot_Be_Blank	Feedback Text	"Feedback text is required when submitting the survey."	✓	Venkata Balaji Sai R, 9/23/2025, 7:53 AM	▼
HR_Reviewer_Must_Assigned_Before_Review	HR Reviewer	"HR Reviewer must be assigned before marking the survey as Reviewed."		Venkata Balaji Sai R, 9/23/2025, 7:54 AM	▼
Prevent_Empty_Survey_Submission	Survey Name	All required fields must be filled to submit the survey."	✓	Venkata Balaji Sai R, 9/23/2025, 7:57 AM	▼
Sentiment_Score_Cannot_Be_Blank	Sentiment Score	"Sentiment Score must be calculated before marking the survey as Reviewed."	✓	Venkata Balaji Sai R, 9/23/2025, 7:55 AM	▼

Pulse Survey

- **Employee_Must_Be_Selected** – Requires employee to be linked.
- **Feedback_Text_Cannot_Be_Blank** – Ensures feedback text is mandatory.
- **HR_Reviewer_Must_Assigned_Before_Review** – Validates HR reviewer assignment before approval.
- **Prevent_Empty_Survey_Submission** – Prevents submitting incomplete surveys.
- **Sentiment_Score_Cannot_Be_Blank** – Requires sentiment analysis score.

Employee Status

- **Combined_Rule** – Consolidates validation logic across employee status fields.
- **Employee_Must_Be_Selected** – Requires employee reference.
- **Related_Schedule_Must_Be_Linked** – Ensures schedule is tied to status record.
- **Status_Must_Be_Selected** – Prevents blank status values.
- **Team_Manager_Must_Be_Assigned_for_Office** – Requires manager assignment for in-office work.
- **Work_Mode_Must_Be_Selected** – Validates remote/hybrid/office work mode.

Validation Rules
6 Items, Sorted by Rule Name

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY	
Combined_Rule	Top of Page	"End Time must be after Start Time, and Status and Work Mode must be selected."	✓	Venkata Balaji Sai R, 9/23/2025, 8:25 AM	▼
Employee_Must_Be_Selected	Employee	"Employee must be selected."	✓	Venkata Balaji Sai R, 9/23/2025, 8:21 AM	▼
Related_Schedule_Must_Be_Linked	Related Schedule	"Related Schedule must be selected."	✓	Venkata Balaji Sai R, 9/23/2025, 8:22 AM	▼
Status_Must_Be_Selected	Status	"Status must be selected."	✓	Venkata Balaji Sai R, 9/23/2025, 8:23 AM	▼
Team_Manager_Must_Be_Assigned_for_Office	Team Manager	"Team Manager must be assigned for Office or Hybrid work mode."		Venkata Balaji Sai R, 9/23/2025, 8:24 AM	▼
Work_Mode_Must_Be_Selected	Work Mode	"Work Mode must be selected (Office, Remote, Hybrid)."	✓	Venkata Balaji Sai R, 9/23/2025, 8:23 AM	▼

2. Workflow Rules

- **Analytics Metric Verified Notification** – Alerts team when a metric is verified.
- **Employee Schedule Approval Notification** – Notifies employee after approval.

- **Employee Status Missing Schedule Alert** – Triggers when status record lacks a related schedule.
- **Pulse Survey Submission Alert** – Alerts manager when a survey is submitted.
- **Well-Being Critical Alert Notification** – Notifies manager/HR when a critical well-being alert is raised.

3. Email Alerts

- **Analytics Metric Verified Notification** – Informs leadership/HR when metrics are verified.
- **Critical Well-Being Alert Notification** – Sends urgent email for critical alerts.
- **Employee Schedule Approval Notification** – Notifies employees of approved schedules.
- **Missing Schedule Alert** – Informs manager about missing schedules.
- **Pulse Survey Submission Alert** – Notifies manager when survey submitted.

4. Field Updates

- **Analytics Metric Verified** – Updates metric record status; raises priority to high.
- **Employee Schedule Notification** – Updates schedule record after approval.

- **Employee Status Missing Schedule Alert** – Updates follow-up status to pending.
- **Pulse Survey Submission Alert** – Updates review status to pending.
- **Well-Being Critical Alert** – Updates follow-up field to pending for critical alerts.

SETUP
Field Updates

All Workflow Field Updates

Field updates allow you to automatically change a field value to one that you specify. Field updates are actions associated with workflow rules and approval processes.

View: All Workflow Field Updates | Edit | Create New View

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | **All**

New Field Update

Action	Name ↑	Field to Update	Operation	Value	Last Modified Date
Edit | Del	Analytics Metric Verified	Analytics Metric: Status	Value	Active,	9/23/2025
Edit | Del	Changes the case priority to high.	Case: Priority	Value	High	9/17/2025
Edit | Del	Employee Schedule	Employee Status: Status	Value	On Break	9/23/2025
Edit | Del	Employee Schedule Notification	Employee Status: Status	Value	Working	9/23/2025
Edit | Del	Employee Status Missing Schedule Alert	Employee Status: Status	Value	On Break	9/23/2025
Edit | Del	Pulse Survey Submission Alert	Pulse Survey: Survey Status	Value	Submited	9/23/2025
Edit | Del	Well-Being Critical Alert	Well-being Alert: Alert Type	Value	Workload,	9/23/2025

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | **All**

5. Tasks

- **Acknowledge Approved Schedule** – Assigned to employee upon approval.
- **Follow up Missing Employee Schedule** – Assigned to manager for correction.
- **Follow-up on Critical Well-Being Alert** – Assigned to manager/HR for immediate action.
- **Review Submitted Pulse Survey** – Assigned to manager for review.
- **Review Verified Metric for Dashboard** – Assigned to analytics/HR team for validation.

SETUP
Tasks

All Tasks

Tasks are the templates that workflow rules use when automatically assigning tasks to users.

View: All Tasks | Create New View

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | **All**

New Task

Action	Subject ↑	Due Date	Priority	Status	Assigned To	Notify Assignee	Type
Edit | Del	Acknowledge Approved Schedule	Rule Trigger Date + 1 days	High	Not Started	User : Employee ERM	☐	Employee Status
Edit | Del	Follow up Missing Employee Schedule	Current User: Last Login + 1 days	High	In Progress	User : Manager ERM	☐	Employee Status
Edit | Del	Follow-up on Critical Well-Being Alert	Well-being Alert: Created Date	High	Not Started	User : Manager ERM	☐	Well-being Alert
Edit | Del	Review Submitted Pulse Survey	Pulse Survey: Created Date	Normal	Not Started	User : Manager ERM	☐	Pulse Survey
Edit | Del	Review Verified Metric for Dashboard	Rule Trigger Date	Normal	Not Started	User : HR ERM	☐	Analytics Metric

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | **All**

6. Custom Notifications

- **Analytics Metric Verified Notification** – Instant notification for leadership/HR.

- **Employee Schedule Approval Notification** – Real-time alert to employee.
- **Employee Status Missing Schedule Alert** – Alert to manager for correction.
- **Pulse Survey Submission Alert** – Notification to manager for survey review.
- **Well-Being Critical Alert Notification** – High-priority notification for well-being issues.

Phase 4 Status: Completed Successfully

Next Steps:

- Proceed to **Phase 5: Apex Programming (Developer)**
- Begin testing Classes & Objects, Apex Triggers, Collections, SQQL &SOSL... etc

Phase 4 Completion Document.