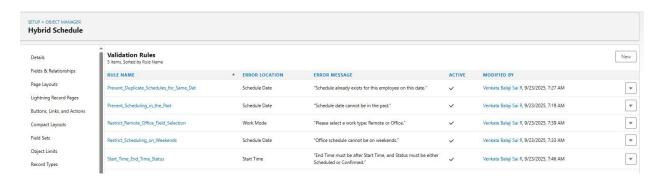
Phase 4: Problem Understanding & Industry Analysis — ERM for Hybrid Workforce

1. Validation Rules

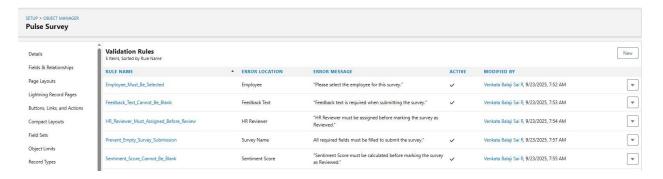
Analytics Metric

- 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.

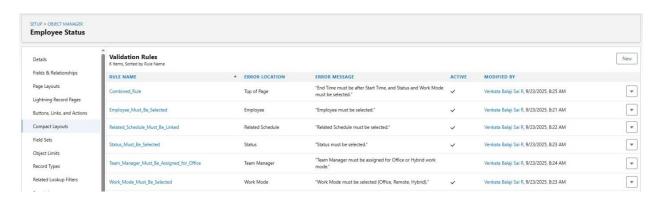


Pulse Survey

- **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.

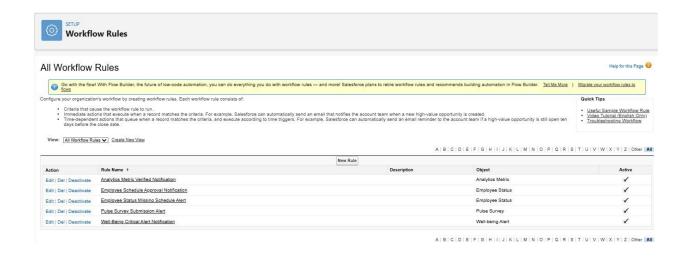
Employee Status

- **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.



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.



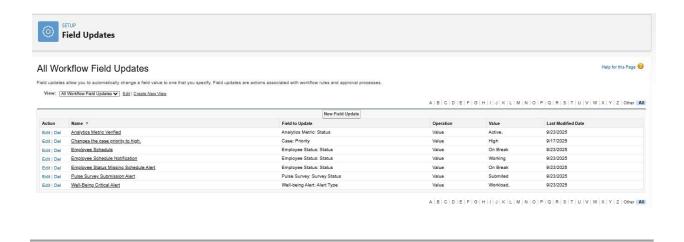
3. Email Alerts

- 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.



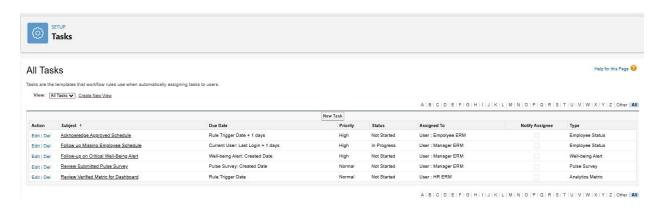
4. Field Updates

- 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.



5. Tasks

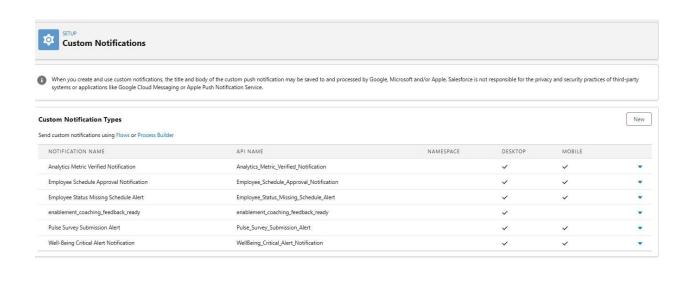
- Acknowledge Approved Schedule Assigned to employee upon approval.
- Follow up Missing Employee Schedule Assigned to manager for correction.
- **Follow-up on Critical Well-Being Alert** Assigned to manager/HR for immediate action.
- **Review Submitted Pulse Survey** Assigned to manager for review.
-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



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