


ERM Hybrid Workforce Project – Phase 3

Phase 3: Data Modeling & Relationships

1. Standard & Custom Objects

- **Standard Objects Used:**
 - **User:** Employee user profiles and access control.
 - **Account:** Organization/department information.
 - **Task & Event:** Tracking employee tasks, meetings, and hybrid schedules.
- **Custom Objects Created:**
 - Hybrid Schedule
 - Survey Feedback
 - Well-being Alert
 - Analytics Metric
 - Employee Status

<div><div> Object Manager</div><div>1 Items, Sorted by Label</div></div> <div><input type="text" value="hyb"/> Schema Builder Create ▾</div>					
LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Hybrid Schedule	Hybrid_Schedule__c	Custom Object	Tracks employee office vs. remote workdays for hybrid workforce management	9/23/2025	✓

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Pulse Survey	Pulse_Survey__c	Custom Object	Captures employee engagement feedback and survey responses	9/23/2025	✓

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Well-being Alert	Well_being_Alert__c	Custom Object	Tracks employee burnout risk, workload imbalance, and well-being alerts	9/23/2025	✓

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Analytics Metric	Analytics_Metric__c	Custom Object	Stores aggregated workforce data for dashboards and reporting	9/23/2025	✓

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Employee Status	Employee_Status__c	Custom Object		9/22/2025	✓

2. Fields

- Custom fields were added to support project-specific requirements.
 - **Hybrid Schedule:** Schedule name, Start Time, Work mode, Status..etc
 - **Survey Feedback:** Survey Name, Survey Score, Sentiment Score, Employee..
 - **Well-being Alert:** Alert Name, Alert Type, Severity, Status, Trigger Date.
 - **Analytics Metric:** Metric Name, Record Type, Value, Source
 - **Employee Status:** Employee, Work Mode, Date..

[Setup > Object Manager](#)
Hybrid Schedule

Details	Fields & Relationships				
	14 Items, Sorted by Field Label			<input type="text" value="Quick Find"/>	New Deleted Fields Field Dependencies Set History Tracking
Fields & Relationships					
Page Layouts	End Time	End_Time__c	Time		
Lightning Record Pages	Last Modified By	LastModifiedById	Lookup(User)		
Buttons, Links, and Actions	Manager	Manager__c	Lookup(User)	✓	
Compact Layouts	Notes	Notes__c	Long Text Area(32768)		
Field Sets	Owner	OwnerId	Lookup(User,Group)	✓	
Object Limits	Record Type	RecordTypeId	Record Type	✓	
Record Types	Schedule Name	Name	Text(80)	✓	
Related Lookup Filters	Start Time	Start_Time__c	Time		
Search Layouts	Status	Status__c	Picklist		
List View Button Layout	Work Mode	Work_Mode__c	Picklist		
Restriction Rules					
Scoping Rules					

[illegible]

3. Record Types

- Record types were created to differentiate types of records where necessary:

SETUP > OBJECT MANAGER

Hybrid Schedule

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Record Types

3 Items, Sorted by Record Type Label

Q, Quick Find

New

Page Layout Assignment

RECORD TYPE LABEL	DESCRIPTION	ACTIVE	MODIFIED BY
Employee Schedule	Employees log daily work mode	✓	Venkata Balaji Sai R, 9/23/2025, 2:50 AM
HR Occupancy Tracker	HR tracks office occupancy	✓	Venkata Balaji Sai R, 9/23/2025, 2:51 AM
Manager Schedule View	Managers review team schedules	✓	Venkata Balaji Sai R, 9/23/2025, 2:50 AM

- Hybrid Schedule** :.Employee Schedule, HR Occupancy, Manager Schedule.
- Survey Feedback** : Employee feedback, Leadership Survey, manger Feedback.
- Well-being Alert** : Burnout Risk, General well being, workload.
- Analytics Metric** : Attrition Metric ,Engagement metric, Productivity Metric
- Employee Status** : Daily Status, Exception Status, Leave, Manager Review

SETUP > OBJECT MANAGER

Employee Status

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

4 Items, Sorted by Record Type Label

Q, Quick Find

New

Page Layout Assignment

RECORD TYPE LABEL	DESCRIPTION	ACTIVE	MODIFIED BY
Daily Status		✓	Venkata Balaji Sai R, 9/23/2025, 2:31 AM
Exception Status	Handles unplanned absences or manager overrides.	✓	Venkata Balaji Sai R, 9/23/2025, 2:34 AM
Leave / PTO Status	Capture leave requests or vacations	✓	Venkata Balaji Sai R, 9/23/2025, 2:34 AM
Manager Review Status		✓	Venkata Balaji Sai R, 9/23/2025, 2:36 AM

SETUP > OBJECT MANAGER

Analytics Metric

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Record Types

3 Items, Sorted by Record Type Label

Q, Quick Find

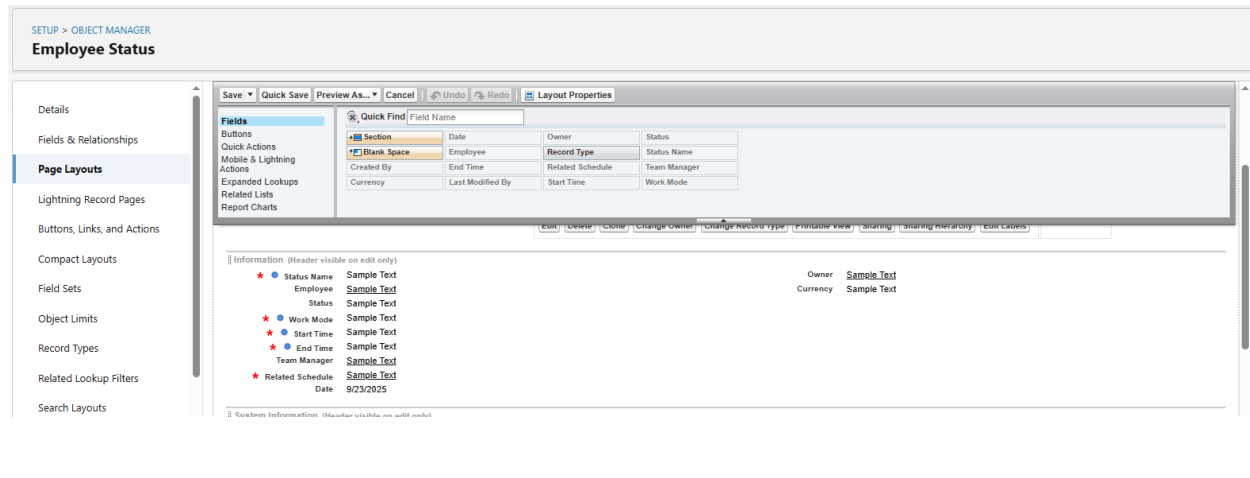
New

Page Layout Assignment

RECORD TYPE LABEL	DESCRIPTION	ACTIVE	MODIFIED BY
Attrition Risk Metrics	Tracks predictive analytics on attrition, employee turnover risk	✓	Venkata Balaji Sai R, 9/23/2025, 2:41 AM
Engagement Metrics	Tracks survey participation, employee sentiment scores, feedback trends.	✓	Venkata Balaji Sai R, 9/23/2025, 2:40 AM
Productivity Metrics	Tracks tasks completed, project progress, and performance trends	✓	Venkata Balaji Sai R, 9/23/2025, 2:41 AM

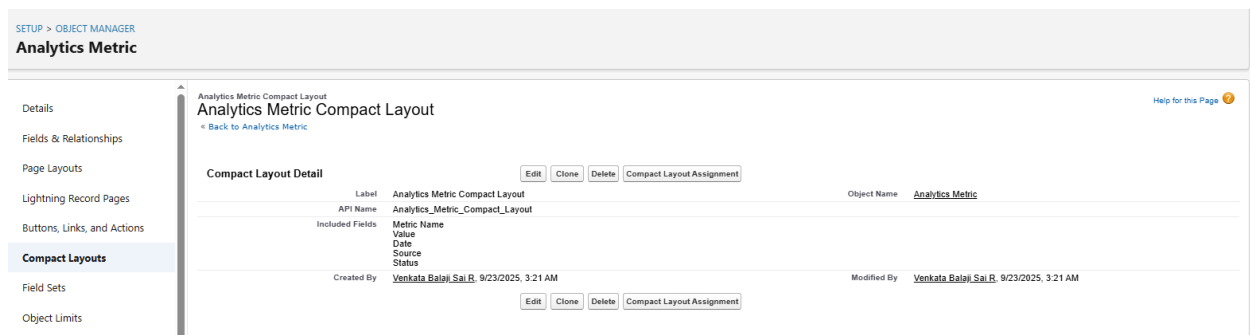
4. Page Layouts

- Page layouts were customized for each object to display relevant fields, sections, and related lists efficiently.



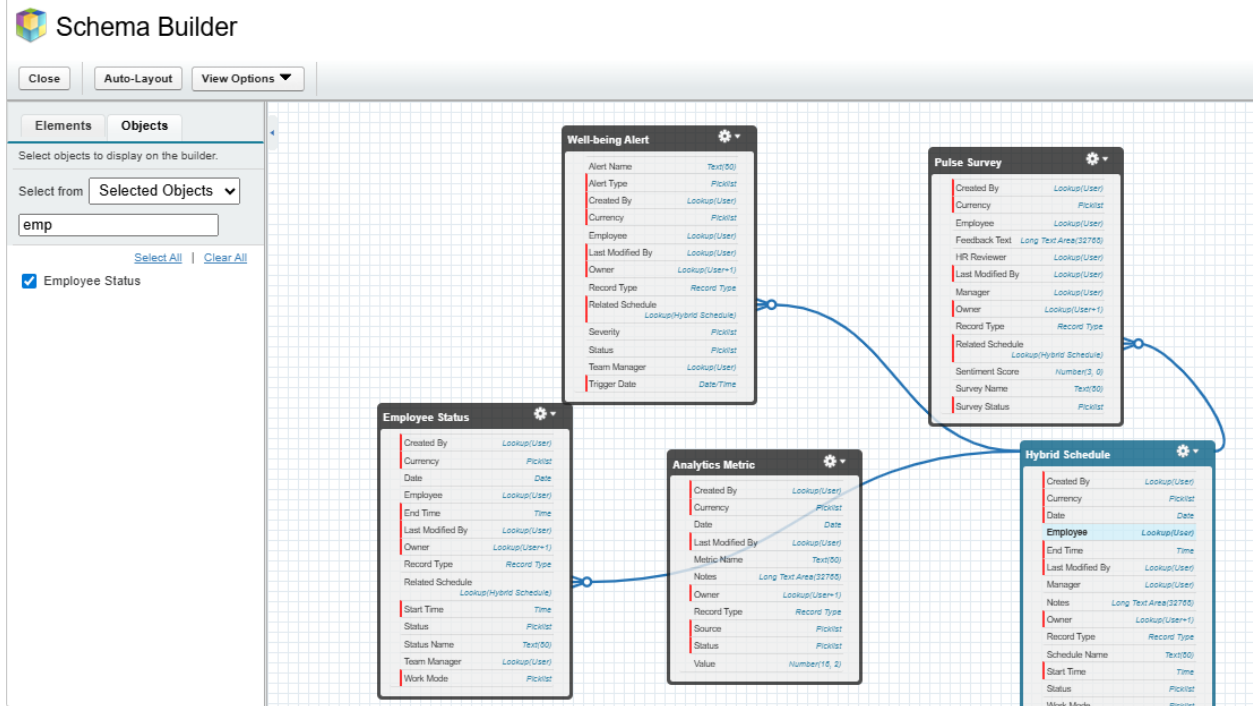
5. Compact Layouts

- Compact layouts were configured for quick access to critical fields in mobile and desktop views.



6. Schema Builder

- All objects, fields, and relationships were visualized and verified using **Schema Builder**.
- Relationships created:
 - **Lookup Relationships:** Employee → Manager, Employee → Department
 - **Master-Detail Relationships:** Feedback → Employee, Attendance → Employee



Next Steps:

- Proceed to **Phase 4: User Setup, Profiles, and Permission Sets**.
- Begin testing object access, layouts, and record creation.

Phase 3 Completion Document.
