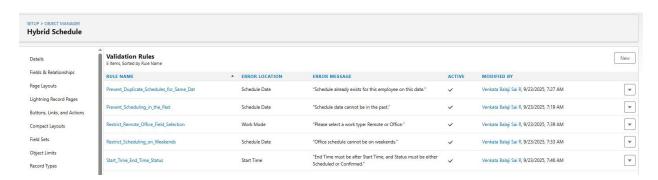
# ERM Hybrid Workforce Project – Phase 4

# **Phase 4: Process Automation (Admin)**

## 1. Validation Rules

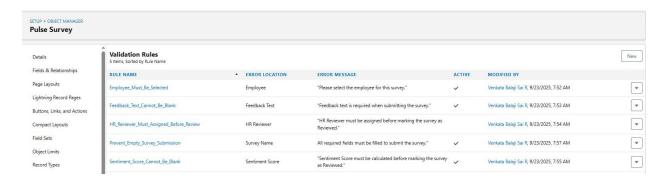
## **Analytics Metric**

- 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.

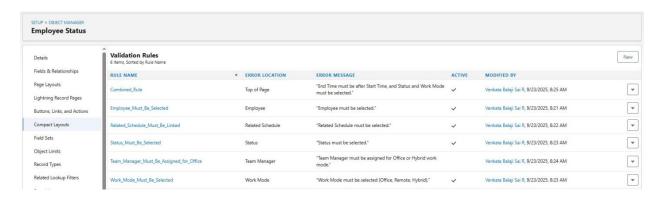


#### **Pulse Survey**

- **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

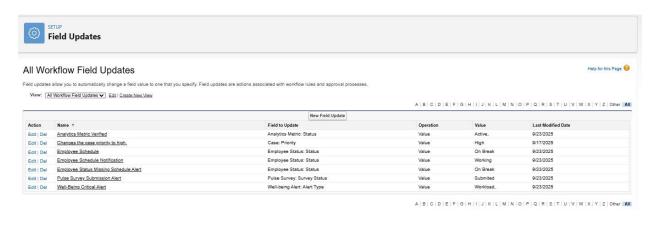
- **Analytics Metric Verified Notification** Informs leadership/HR when metrics are verified.
- Critical Well-Being Alert Notification Sends urgent email for critical alerts.
- Employee Schedule Approval Notification Notifies employees of approved schedules.
- **Missing Schedule Alert** Informs manager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



# 4. Field Updates

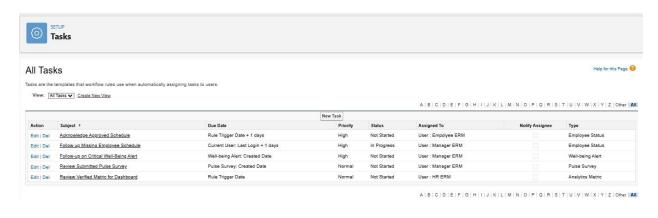
- Analytics Metric Verified Updates metric record status; raises priority to high.
- Employee Schedule Notification Updates schedule record after approval.

- **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

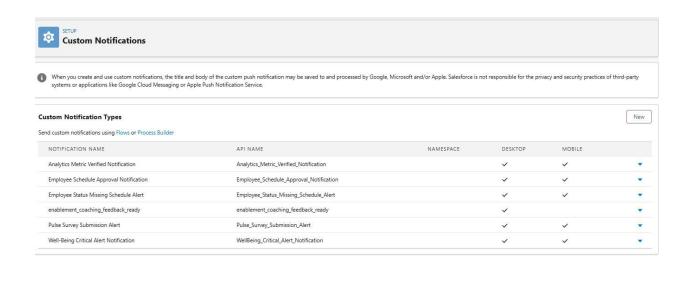
- Acknowledge Approved Schedule Assigned to employee upon approval.
- Follow up Missing Employee Schedule Assigned to manager for correction.
- **Follow-up on Critical Well-Being Alert** Assigned to manager/HR for immediate action.
- **Review Submitted Pulse Survey** Assigned to manager for review.
-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

#### **Phase 4 Completion Document.**