ERM Hybrid Workforce Project – Phase 3 Completion Document

Phase 3: Data Modeling & Relationships

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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

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			
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				

SETUP > OBJECT MANAGER
Employee Status

Details	**Fields & Relationships** 14 Items, Sorted by Field Label			
Fields & Relationships				
Page Layouts	End Time	End_Time__c	Time	
Lightning Record Pages	Last Modified By	LastModifiedById	Lookup(User)	
Buttons, Links, and Actions	Owner	OwnerId	Lookup(User,Group)	✓
Compact Layouts	Record Type	RecordTypeId	Record Type	✓
Field Sets	Related Schedule	Related_Schedule__c	Lookup(Hybrid Schedule)	✓
Object Limits	Start Time	Start_Time__c	Time	
Record Types	Status	Status__c	Picklist	
Related Lookup Filters	Status Name	Name	Text(80)	✓
Search Layouts	Team Manager	Team_Manager__c	Lookup(User)	✓
List View Button Layout	Work Mode	Work_Mode__c	Picklist	
Restriction Rules				
Scoping Rules				

3. Record Types

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

SETUP > OBJECT MANAGER
Hybrid Schedule

Record Types			
3 Items, Sorted by Record Type Label			

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

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

SETUP > OBJECT MANAGER
Employee Status

Record Types			
4 Items, Sorted by Record Type Label			

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

Record Types			
3 Items, Sorted by Record Type Label			

| 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.
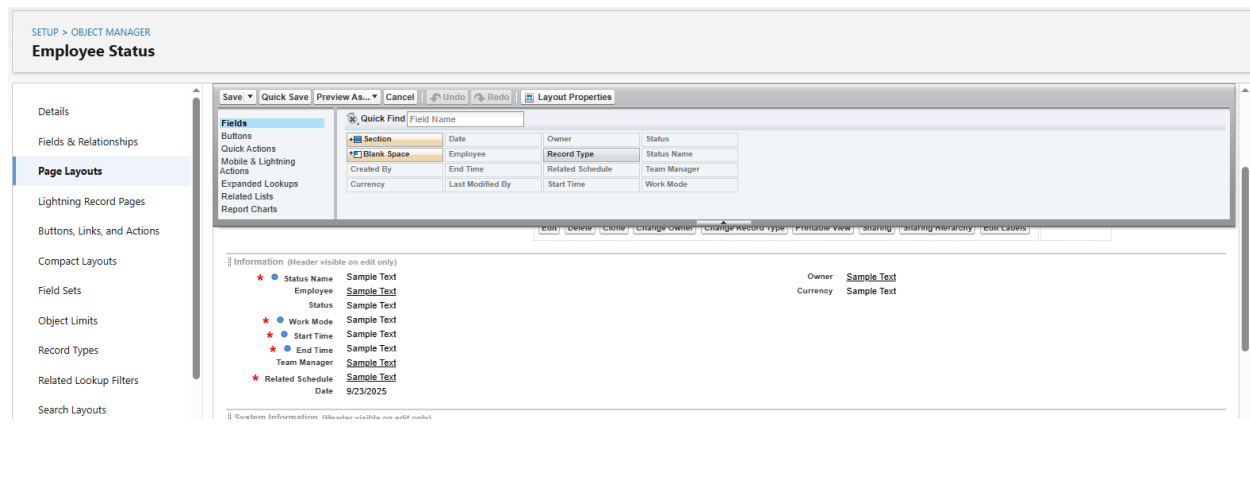

5. Compact Layouts

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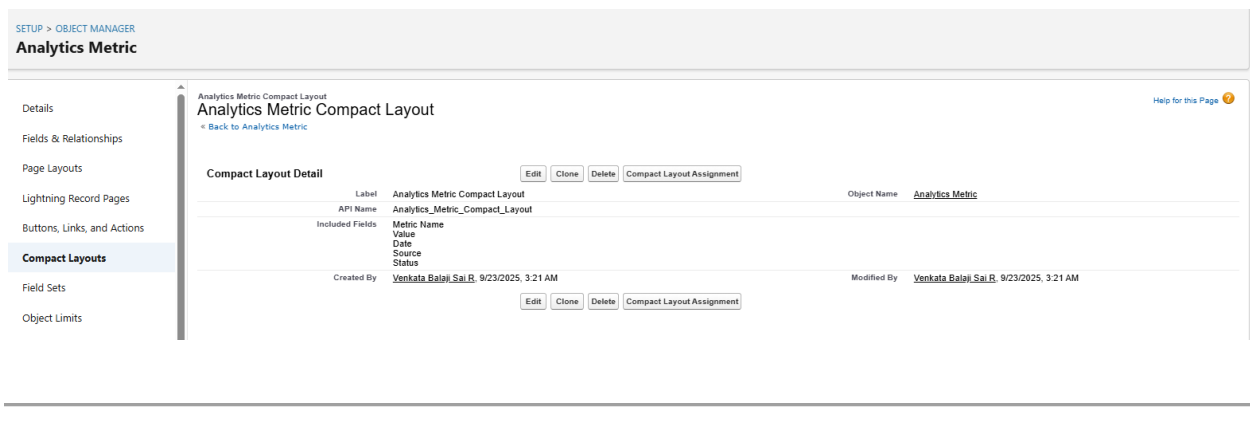
6. Schema Builder

- 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

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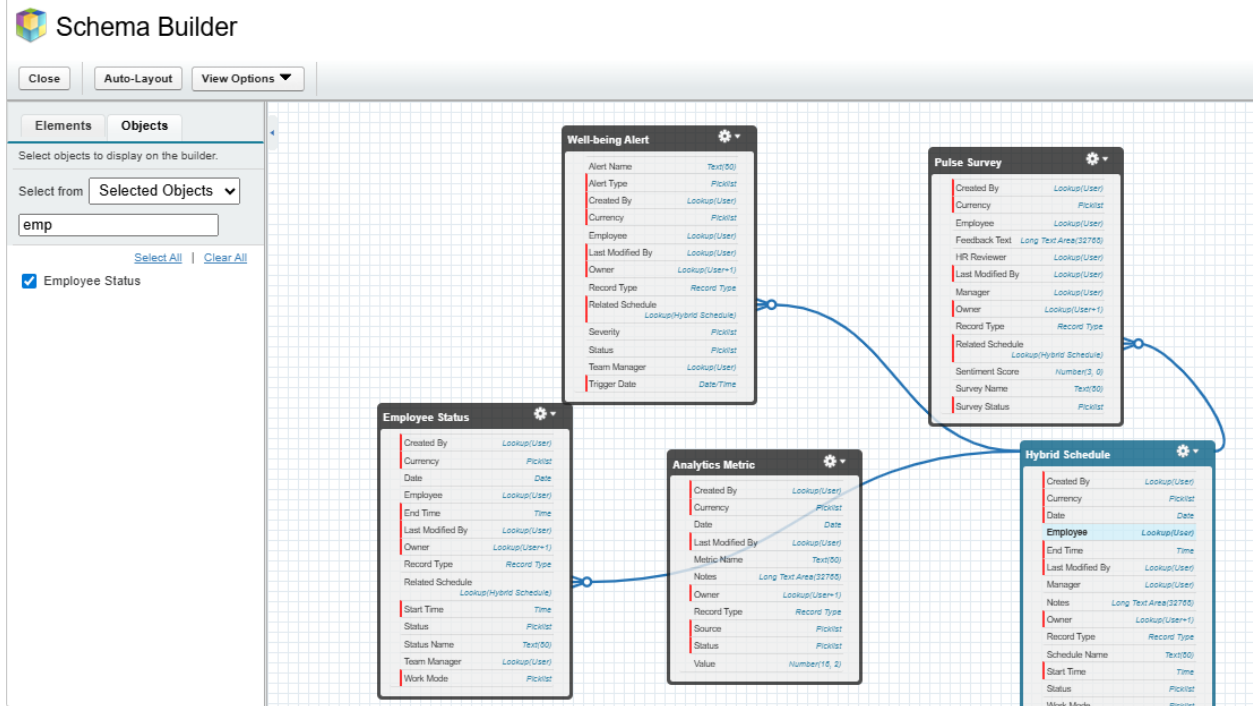
Phase 3 Status: ✅Completed Successfully

Next Steps:

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