**Workforce Administration Solution – Requirements Document**

**1. Project Overview**

The *Workforce Administration Solution* is a Salesforce-based application created for TheSmartBridge to manage employee details, projects, tasks, assets, and leave data. It provides a centralized, cloud-hosted platform to ensure secure, role-based access, efficient workflows, and real-time insights via dashboards and reports.

**2. Objective**

To build a scalable and secure cloud application that automates employee and asset administration while enhancing data visibility, collaboration, and decision-making for HR, Managers, and Employees using Salesforce.

**3. Functional Requirements**

The solution must support the following functionalities:

* Management of custom objects: **Employee, Project, Project Task, Asset, Asset Service, Leave**
* Record creation, modification, and deletion with appropriate access levels.
* Custom page layouts and record types for On Site and Remote Employees.
* Relationship mapping using Lookup and Master-Detail fields.
* Lightning App creation with navigation tabs.
* Custom profiles and role hierarchy for HR, Manager, On Site and Remote Employees.
* Organization-Wide Defaults (OWD) and sharing rules for data security.
* Chatter Group setup for internal communication.
* Reports and dashboards for tracking performance, assets, and leave.
* Approval process for leave applications.
* Triggers and validation rules for data integrity and automation.

**4. Non-Functional Requirements**

* The system should be built on **Salesforce Developer Edition** with support for custom development.
* User interfaces should be responsive and accessible via **Lightning Experience**.
* Data operations must comply with Salesforce security and sharing models.
* System should support scalability for future enhancements (Flows, LWCs, etc.).

**5. Users and Roles**

| **Role** | **Responsibilities** |
| --- | --- |
| **HR** | Manage employee data, assign assets, process leave, create user records |
| **Manager** | Assign tasks, monitor project and task completion, approve leaves |
| **On Site Employee** | Execute tasks assigned at the physical office location |
| **Remote Employee** | Perform tasks remotely and log work updates via the app |

**6. Assumptions**

* All users will be created with valid Salesforce licenses.
* Each object will follow the described schema and field structure.
* Developer Edition limits will be considered during implementation.
* Users are expected to have basic Salesforce navigation knowledge.

**7. Constraints**

* Storage and feature limitations of Salesforce Developer Org.
* Apex governor limits and daily API request thresholds.
* Cannot integrate external systems without additional licensing.
* Customization limited to standard Salesforce development capabilities.

**8. Deliverables**

* Configured Salesforce Developer Org
* Custom Objects, Fields, and Relationships
* Tabs and Lightning App: *Workforce Administration Solution*
* Profiles and Role Hierarchy
* Record Types and Page Layouts
* Reports and Dashboards
* Approval Process for Leave
* Triggers and Validation Rules

**Final Documentation:**

* + Project Report
  + Requirements Document
  + User Guide