**Admineex Bonus Management System - Features for Non-Technical Users**

**What is the Bonus Management System?**

The Bonus Management System is a user-friendly software tool that helps your company manage employee bonuses from start to finish. It simplifies the process of creating, calculating, approving, and distributing bonuses to your staff.

**Main Features**

1. **Bonus Templates**
   * Create reusable bonus plans (like "Quarterly Performance Bonus" or "Project Completion Bonus")
   * Set up different bonus types (fixed amounts, percentage-based, or custom calculations)
   * Activate or deactivate templates as needed
2. **Personnel Management**
   * Keep track of employee information relevant to bonuses
   * Create "snapshots" of employee data at specific points in time
   * Ensure bonuses are calculated based on accurate information
3. **Bonus Generation**
   * Create new bonuses based on templates with just a few clicks
   * Generate bonuses for specific time periods (monthly, quarterly, yearly)
   * Automatically calculate bonus amounts based on your predefined rules
4. **Approval Workflow**
   * Review generated bonuses before they're finalized
   * Multi-step approval process ensures accuracy and oversight
   * Track the status of each bonus (generated, under review, approved, paid)
5. **Reporting and Exports**
   * View summary reports of all bonuses
   * Break down bonus information by department, employee category, or time period
   * Export reports to Excel for further analysis or record-keeping

**Benefits for Your Business**

* **Time-Saving**: Automates complex bonus calculations that would take hours to do manually
* **Accuracy**: Reduces human error in bonus calculations
* **Transparency**: Provides clear records of how bonuses were calculated and approved
* **Consistency**: Ensures bonuses are calculated the same way every time
* **Flexibility**: Adapts to different bonus structures and business needs

The system is now live and accessible through a web browser at the URL I provided earlier. No technical knowledge is required to use it - the interface is intuitive with clear menus and buttons for each function.

Here’s the **full workflow** for the bonus management system based on the provided context and project description:

**1. Bonus Template Management**

This is the starting point where administrators define the rules and configurations for bonuses.

**Steps:**

1. **Create Bonus Templates**:
   * Administrators define bonus templates with the following attributes:
     + **Category**: with\_parts, without\_parts, [fixed\_amount](vscode-file://vscode-app/private/var/folders/10/ycsp0kzs1jg24jvtc7qgy82r0000gn/T/AppTranslocation/688C98D2-2E75-4C63-8F59-8764113E8725/d/Visual%20Studio%20Code.app/Contents/Resources/app/out/vs/code/electron-sandbox/workbench/workbench.html" \o "), or [percentage](vscode-file://vscode-app/private/var/folders/10/ycsp0kzs1jg24jvtc7qgy82r0000gn/T/AppTranslocation/688C98D2-2E75-4C63-8F59-8764113E8725/d/Visual%20Studio%20Code.app/Contents/Resources/app/out/vs/code/electron-sandbox/workbench/workbench.html).
     + **Periodicity**: daily, weekly, monthly, quarterly, semesterly, yearly, or on\_demand.
     + **Eligibility Rules**: Define conditions (e.g., grade === 'A', status === 'active') to determine eligible personnel.
     + **Calculation Config**:
       - For with\_parts: Define part rules (e.g., grade === 'A' → 2 parts).
       - For [percentage](vscode-file://vscode-app/private/var/folders/10/ycsp0kzs1jg24jvtc7qgy82r0000gn/T/AppTranslocation/688C98D2-2E75-4C63-8F59-8764113E8725/d/Visual%20Studio%20Code.app/Contents/Resources/app/out/vs/code/electron-sandbox/workbench/workbench.html): Define the base field (e.g., salary) and percentage.
       - For [fixed\_amount](vscode-file://vscode-app/private/var/folders/10/ycsp0kzs1jg24jvtc7qgy82r0000gn/T/AppTranslocation/688C98D2-2E75-4C63-8F59-8764113E8725/d/Visual%20Studio%20Code.app/Contents/Resources/app/out/vs/code/electron-sandbox/workbench/workbench.html" \o "): Define a fixed bonus amount.
       - For custom\_formula: Define a formula (e.g., base \* 0.03 \* parts).
     + **Approval Workflow**: Define roles and steps for approving bonuses.
2. **Modify or Update Templates**:
   * Templates can be updated to reflect changes in rules, periodicity, or calculation logic.
3. **Deactivate Templates**:
   * Templates can be deactivated if they are no longer applicable.

**2. Personnel Management**

This step ensures that personnel data is up-to-date and ready for bonus calculations.

**Steps:**

1. **Personnel Data Management**:
   * Maintain personnel records, including:
     + **Status**: Fonctionnaire, Non-Fonctionnaire, etc.
     + **Category**: A, B, C, D, or IDs from categories.json.
     + **Rank**: Chef de bureau, Directeur, etc.
     + **Salary**: Used for percentage-based bonuses.
     + **Snapshot Data**: Historical data for retroactive adjustments.
2. **Snapshot Creation**:
   * Take snapshots of personnel data at the time of bonus generation to ensure consistency and allow retroactive adjustments.

**3. Bonus Generation**

This is the core process where bonuses are calculated and allocated to eligible personnel.

**Steps:**

1. **Trigger Bonus Generation**:
   * Bonuses can be generated:
     + **Automatically**: Based on the periodicity defined in the template.
     + **Manually**: By administrators for specific templates or periods.
2. **Eligibility Query**:
   * The system builds a MongoDB query using the [eligibilityRules](vscode-file://vscode-app/private/var/folders/10/ycsp0kzs1jg24jvtc7qgy82r0000gn/T/AppTranslocation/688C98D2-2E75-4C63-8F59-8764113E8725/d/Visual%20Studio%20Code.app/Contents/Resources/app/out/vs/code/electron-sandbox/workbench/workbench.html" \o ") from the template (via [buildEligibilityQuery](vscode-file://vscode-app/private/var/folders/10/ycsp0kzs1jg24jvtc7qgy82r0000gn/T/AppTranslocation/688C98D2-2E75-4C63-8F59-8764113E8725/d/Visual%20Studio%20Code.app/Contents/Resources/app/out/vs/code/electron-sandbox/workbench/workbench.html" \o ")).
   * Example:

{

    grade: { $eq: 'A' },

    status: { $eq: 'active' }

}

1. **Fetch Eligible Personnel**:
   * Query the database to retrieve personnel who meet the eligibility criteria.
2. **Calculate Parts**:
   * For with\_parts bonuses, calculate the number of parts for each eligible personnel using the calculateParts function.
   * Example:
     + Fonctionnaire, Category A → 2 parts.
     + Non-Fonctionnaire, Category 10 → 2 parts.
     + Rank overrides category (e.g., Directeur → 6 parts).
3. **Calculate Bonus Amount**:
   * Use the [calculateAmount](vscode-file://vscode-app/private/var/folders/10/ycsp0kzs1jg24jvtc7qgy82r0000gn/T/AppTranslocation/688C98D2-2E75-4C63-8F59-8764113E8725/d/Visual%20Studio%20Code.app/Contents/Resources/app/out/vs/code/electron-sandbox/workbench/workbench.html" \o ") function to compute the bonus amount for each eligible personnel based on the template's category:
     + **Fixed Amount**: Use the [fixedAmount](vscode-file://vscode-app/private/var/folders/10/ycsp0kzs1jg24jvtc7qgy82r0000gn/T/AppTranslocation/688C98D2-2E75-4C63-8F59-8764113E8725/d/Visual%20Studio%20Code.app/Contents/Resources/app/out/vs/code/electron-sandbox/workbench/workbench.html" \o ") field.
     + **Percentage**: Multiply the base field (e.g., salary) by the percentage.
     + **With Parts**: Multiply the number of parts by the share amount.
     + **Custom Formula**: Evaluate the formula defined in the template.
4. **Create Bonus Allocations**:
   * For each eligible personnel, create a BonusAllocation document with:
     + Personnel ID.
     + Calculated amount.
     + Parts (if applicable).
     + Status (eligible).

**4. Workflow and Approval**

Once bonuses are generated, they go through a workflow for validation and approval.

**Steps:**

1. **Draft State**:
   * Generated bonuses are in the draft state.
   * Administrators can review and adjust allocations (e.g., modify amounts, add/remove personnel).
2. **Approval Workflow**:
   * Bonuses move through the approval workflow defined in the template:
     + Sequential or parallel approvals by roles (e.g., Manager, Director).
     + Each step must be completed before moving to the next.
3. **Validation**:
   * Once all approvals are completed, bonuses are marked as validated.

**5. Payment and Reporting**

After validation, bonuses are prepared for payment and reporting.

**Steps:**

1. **Payment Preparation**:
   * Generate a secure file (e.g., PDF or Excel) with the final list of beneficiaries and amounts.
   * The file is signed or encrypted to ensure data integrity.
2. **Payment Execution**:
   * The file is transmitted to the payment system (e.g., payroll system) for disbursement.
3. **Reporting**:
   * Generate detailed reports for tracking and auditing:
     + By agent, service, or period.
     + Total amounts, number of beneficiaries, etc.
   * Export reports in non-modifiable formats (e.g., PDF).

**6. Retroactive Adjustments**

Handle changes to personnel data or bonus rules after bonuses have been generated.

**Steps:**

1. **Detect Changes**:
   * Compare the current snapshot with the snapshot taken during bonus generation.
   * Identify changes (e.g., promotions, sanctions, retirements).
2. **Recalculate Bonuses**:
   * Adjust bonus amounts based on the updated data.
   * Example:
     + A personnel promoted from Category B to Category A → Update parts from 1 to 2.
3. **Create Adjustment Records**:
   * Log adjustments as separate records linked to the original bonus allocation.

**7. Special Cases**

Handle edge cases and exceptions during bonus management.

**Examples:**

1. **Sanctions**:
   * Suspend bonuses for personnel under sanctions.
2. **Deceased Personnel**:
   * Exclude deceased personnel from bonus allocations.
3. **Retirements**:
   * Adjust bonuses for personnel who retired during the period.
4. **Multiple Roles**:
   * Handle personnel with multiple roles or ranks (e.g., assign the highest rank for parts calculation).

**8. Security and Audit**

Ensure data integrity and maintain an audit trail for all operations.

**Steps:**

1. **Role-Based Access Control**:
   * Restrict access to bonus management features based on user roles (e.g., Admin, Manager, Consultant).
2. **Data Integrity**:
   * Generate signatures or tokens for bonus files to prevent unauthorized modifications.
3. **Audit Logs**:
   * Track all changes to templates, allocations, and approvals.

**Summary of Workflow**

1. **Define Templates** → 2. **Manage Personnel** → 3. **Generate Bonuses** → 4. **Approval Workflow** → 5. **Payment and Reporting** → 6. **Retroactive Adjustments** → 7. **Handle Special Cases** → 8. **Ensure Security and Audit**.

This workflow ensures a transparent, automated, and secure process for managing bonuses and gratifications. Let me know if you’d like further details on any specific step!