HR BONUS ANALYTICS

Functional Documentation

1. Overview

The HR Bonus Analytics dashboard consolidates the performance evaluation of Supervisors and Managers based on weighted objectives and critical incident penalties within a defined Budget cycle (July–June).

The objective of the solution is to provide executive, tactical, and operational visibility into compliance levels and bonus eligibility by Country, Area, Manager, and Supervisor.

2. Business Logic

2.1 Objective Compliance Calculation

For each Supervisor and month, objective compliance is calculated as:

Compliance = valor_real / valor_objetivo (Scale 0–1)

2.2 Weighted Monthly Supervisor Compliance

Monthly compliance is calculated by applying the predefined objective weights:

Weighted Compliance = Σ (Objective Compliance × Objective Weight)

All weights sum to 1.

2.3 Supervisor Bonus Rules

Compliance Level	Bonus Awarded
≥ 95%	100% Bonus
≥ 60% and < 95%	50% Bonus
< 60%	No Bonus

2.4 Critical Incident Penalty

If a Supervisor has a critical incident during the period, the objective 'Incident Management' is penalized to zero for the affected period.

2.5 Manager Compliance Calculation

Manager compliance is calculated as the average compliance of all Supervisors reporting to the Manager within the selected period.

3. Report Structure

3.1 Summary Page (Visible)
Executive-level overview including:
- % Active Supervisors
- % Manager Compliance
- Compliance by Country and Objective
- Budget Cycle Selector
- View with and without penalties

3.2 Tooltip Summary (Hidden)
Provides contextual details including:
- Supervisor count
- Critical incident indicator
- Additional breakdown metrics

3.3 Manager Page (Visible)
Tactical-level view including:
- Monthly Supervisor Compliance matrix
- Manager Bonus percentage
- Drillthrough navigation to Supervisor detail page

3.4 Supervisor Page (Hidden – Drillthrough)
Operational-level detail including:
- Monthly Compliance by Objective
- Weighted Monthly Compliance
- Bonus KPI classification
- Critical Incident indicator

3.5 Tooltip Supervisor (Hidden)
Displays contextual metrics such as:
- Objective target value
- Critical incident flag
- KPI classification

4. Assumptions and Constraints
- Compliance values are normalized to scale 0–1.
- Objective weights sum to 1.
- Only closed months are considered for performance calculations.
- Incident penalties are applied at data source level (SQL layer).