

# Folio

## Office Management System

User Guide — Version 1.0

Administrator · Accountant · HR · Guest

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# 1. Introduction & System Overview

Folio is a self-hosted office management system designed for organisations that operate multiple companies or entities under one roof. It provides a single, role-controlled interface for financial transactions, HR, payroll, letters, and reporting.

## Core Modules

| Field          | Description  |
|----------------|--|
| Transactions   | Record income, expenses, and movements across all companies with full audit trail.   |
| Companies      | Manage multiple legal entities, parent-child structures, and per-company financials. |
| Employees & HR | Employee profiles, documents, leave requests, leave balances, and HR policies.       |
| Payroll        | Process payroll entries, generate payslips, track paid status, and export reports.   |
| Reports        | Payroll summary, employee export, financial overview — CSV and PDF output.           |
| Letters        | Generate HR letters from templates (employment, reference, bank cover).              |
| Admin Panel    | User management, branding, backup, schema migrations, currency settings.             |

## Technology Stack

Folio runs on PHP 7.4+ with a SQLite database — no MySQL or PostgreSQL required. It installs on any shared hosting account supporting PHP. The frontend uses vanilla JavaScript, Chart.js, and a custom CSS variable theme system (light and dark mode). PDF generation is handled by the bundled dompdf library.

Supported currencies: USD, JMD, KYD, CAD, EUR, GBP — with live rate refresh from the Admin panel. All amounts display in the selected display currency; raw storage is always in the base currency.

## 2. First-Run Setup

On the very first visit to your Folio installation, the system detects that no administrator account exists and automatically redirects to the setup wizard at `/setup/install.php`. This screen appears only once.

### Step-by-step

- **Organisation Name** — Enter your company or group name. This appears in the header, reports, and exported documents.
- **Default Theme** — Choose Dark or Light. Users can switch individually from the header bar.
- **Administrator Account** — Full name, email, and password (minimum 8 characters). This is the master login — store it securely.
- **First Company** — At least one company is required. Additional companies are added from the Dashboard after login.
- **Click Complete Setup** — the schema migrations run automatically and you are redirected to the login page.

### After setup completes

The setup wizard is permanently locked. Visiting `/setup/install.php` when an admin account exists redirects immediately to `/login.php`. To reset, the database file (`data/app.db`) must be deleted — which erases all data.

### Deployment Checklist

| Field                    | Description   |
|--------------------------|---|
| PHP version              | PHP 7.4 or higher (8.x recommended). Extensions: pdo_sqlite, json, zip, mbstring.   |
| Permissions              | <code>data/</code> directory must be writable by the web server. <code>uploads/</code> must also be writable. Set both to 775.  |
| Root install             | Folio must be installed at the domain root (e.g. <code>office.yourdomain.com/</code> ). Subdirectory installs are not supported.                                      |
| HTTPS                    | Strongly recommended. Uncomment the HTTPS rewrite rule in <code>.htaccess</code> after adding an SSL certificate.   |
| <code>data/app.db</code> | SQLite database. Keep this directory protected by <code>.htaccess</code> (already configured). Never move it to a public location.                                    |
| <code>backups/</code>    | Where system backups are written. Should be writable and ideally backed up off-server.  |
| <code>.htaccess</code>   | Pre-configured to block <code>/data/</code> , <code>/migrations/</code> , <code>/logs/</code> , <code>/backups/</code> , <code>/setup/</code> from direct web access. |

### 3. Roles & Access Control

Folio uses four fixed roles. Each user is assigned exactly one role. Administrators can create users of any role from the Admin Panel.

| Role          | Access Level | Key Capabilities   |
|---------------|--------------|--|
| Administrator | Full access  | All modules, user management, settings, backups, migrations                    |
| Accountant    | Financial    | Transactions, payroll, reports — scoped to assigned companies                  |
| HR            | People ops   | Employees, leave management, letters, payroll view — no financial transactions |
| Guest         | View only    | Read-only dashboard summary and transaction list. Cannot create or delete.     |

#### Company Scoping

Accountants are assigned to specific companies by the Administrator (Admin Panel → Users → Assign Companies). They can only see transactions, payroll, and reports for their assigned companies.

Administrators and HR roles see all companies.

#### Login

The login form requires three fields: email, password, and role. The role field must match the role stored in the database — selecting the wrong role will fail authentication even with correct credentials. This prevents privilege escalation if an email is guessed.

## 4. Dashboard

After login, each role is redirected to its default dashboard. All dashboards support the currency toggle in the header — amounts update instantly without a page reload.

### 4.1 Main Dashboard (Administrator)

The main dashboard at /dashboard.php is the system-wide overview, accessible to all roles. It consists of five sections stacked vertically:

- Hero KPI — Net total, profit margin, income and expenses for the last 30 days, with a 6-month net trend line.
- Performance KPIs — 7-day income vs expenses doughnut chart and net profit area chart.
- Financial Insights — ROI, cash flow, liquidity ratio, burn rate, plus 7-day cashflow bar chart and 6-month net trend.
- Companies Overview — Per-company income / expense / net cards for the last 30 days.
- System Stats — Administrator-only: company tree, transaction totals, and income vs expense pie/bar charts.

### 4.2 Accountant Dashboard

Located at /dashboards/accountant\_dashboard.php. Shows transaction volume, total payroll, and active company count — scoped to the accountant's assigned companies. A recent transactions table (last 5) with links to Transactions, Reports, and Payroll.

### 4.3 Guest Dashboard

Located at /dashboards/guest\_dashboard.php. Read-only view of system-wide totals: transaction volume, total payroll, active companies. Includes an income vs expenses doughnut and a 6-month net trend chart. The recent transactions table is view-only with no action buttons.

### 4.4 HR Dashboard

Located at /hr/hr\_main.php. Quick-stat tiles for employee count, leave requests, payroll entries, letters, and leave types. Includes a recent audit activity feed, an alerts panel (pending leaves), HR insights, and a 6-month payroll entry trend chart. Links to all HR sub-modules.

## 5. Transactions

The transactions module at /transactions.php is the core financial ledger. Every income or expense movement is recorded here with full metadata.

### Adding a Transaction

| Field          | Description  |
|----------------|--|
| Date           | When the transaction occurred (DD/MM/YYYY or date picker).               |
| Company        | Which legal entity this transaction belongs to.                          |
| Amount         | Positive for income, negative for expenses. Supports decimal values.     |
| Description    | Free-text summary of what the transaction represents.                    |
| Parties        | Who paid / received (customer, vendor, employee name).                   |
| Accounts       | Bank or account reference (e.g. Scotiabank USD, Petty Cash).             |
| Payment Method | Cash, cheque, wire, card, etc.   |
| Support Docs   | Reference number or document name (e.g. INV-2024-001).                   |
| Category       | Transaction category group (Revenue, OPEX, COGS, etc.) and sub-category. |

### Filtering & Pagination

The transaction list supports filtering by company, date range, amount range, category, and payment method. Results are paginated (configurable rows per page). A running total displays at the bottom of the visible page in the selected display currency.

### Currency Display

Each transaction stores its original currency. The header currency toggle converts all displayed amounts on the fly using the live exchange rates from Settings. The stored value in the database is never modified.

### Audit Trail

Every add and delete is logged in the action\_logs table with user ID, IP address, timestamp, and the before/after data snapshot. The Admin Panel → Audit Logs provides a searchable view of this history.

## 6. Companies

Companies represent the individual legal entities tracked by Folio. The system supports parent–child company structures (e.g. a holding company with operating subsidiaries).

| Field      | Description  |
|------------|--|
| Name       | Full legal name of the entity.   |
| Code       | Short identifier (e.g. ACME, CWL-PROP). Appears in exports and reports.                          |
| Short Code | Optional abbreviated code for tight layouts.   |
| Parent     | Set to a parent company to create a subsidiary relationship. Leave blank for top-level entities. |
| Active     | Inactive companies are hidden from all dropdowns and reports but data is preserved.              |

Companies are added from the main Dashboard's Add Company panel (admin/accountant), or via `/admin/companies.php` for advanced management including address, phone, email, and logo upload.

## 7. Employees & HR

### 7.1 Employee Profiles

Managed at `/admin/employees.php` (admin) and `/admin/employee_profile.php` (detail view). Each employee record holds:

| Field         | Description   |
|---------------|---|
| Name          | Full name as it appears on official documents.                              |
| Position      | Job title.  |
| Department    | Organisational unit.  |
| Company       | Which entity employs this person.   |
| Email / Phone | Contact details.  |
| Hire Date     | Date employment began (for tenure calculations).                            |
| Join Date     | Date first joined the organisation (may differ from hire date).             |
| Salary        | Base monthly or annual salary figure. Currency follows the payroll default. |
| DOB           | Date of birth (used for age-sensitive benefits).                            |
| Tax ID        | National tax or NIS number.   |
| Status        | Active / Inactive toggle.   |

Documents — Employee profiles support file uploads (IDs, contracts, certificates). Uploaded files are stored in `uploads/employees/{id}/` and can be tagged with category, expiry date, and reminder flags.

### 7.2 Leave Management

Folio includes a full leave lifecycle:

- Leave Types — Configurable leave categories (Vacation, Sick, Maternity, etc.) with default allocation days and colour coding. Managed at `/hr/leave_types.php`.
- Leave Requests — Employees submit requests at `/hr/leave_requests.php`. HR approves or denies. Approved requests automatically decrement the leave balance.
- Leave Balances — Per-employee, per-type balance tracking by year. Carry-over supported. View at `/hr/leave_balances.php`.
- Leave Calendar — Visual calendar view of all approved leave. Accessible at `/hr/leave_calendar.php`.

### 7.3 HR Policies

Internal policy documents are stored and displayed at `/hr/policies.php`. Policies include title, full content, and creation timestamp. Default policies (Code of Conduct, Leave Policy, Remote Work Policy) are seeded at install time. Administrators and HR managers can add, edit, or delete policies.

## 8. Payroll

### 8.1 Processing Payroll

Payroll entries are created at `/payroll/payroll.php`. Each entry covers one employee for one pay period.

| Field          | Description  |
|----------------|--|
| Employee       | Select from the active employee list or type a name manually.  |
| Company        | Which entity is paying.  |
| Pay Period     | Monthly, Bi-weekly, Weekly, or custom label (e.g. 'January 2025').   |
| Pay Date       | Actual payment date.   |
| Gross Pay      | Total before deductions.   |
| Deductions     | Total deductions (tax, NIS, pension, other).   |
| Net Pay        | Calculated automatically (gross - deductions).   |
| Breakdown      | Optional JSON breakdown of deduction line items (Tax, NIS, Pension, Other).  |
| Payment Method | Cash, cheque, bank transfer, etc.  |
| Currency       | Overrides the default payroll currency for this entry.   |
| Status         | Unpaid / Paid. Marking Paid triggers an automatic expense transaction and an optional CWFMS push (see Chapter 12). |

### 8.2 Payslips & Exports

- Payslip — Individual payslip view at `/payroll/payslip.php?id=N`. Printable. PDF version at `/payroll/payslip_pdf.php?id=N`.
- Payroll Report — Filtered by company/year at `/payroll/payroll_report.php`. CSV and PDF export.
- Summary Export — Monthly totals and top earners at `/payroll/summary.php`. Export to CSV or PDF.
- Overview Export — By month and pay period at `/payroll/overview.php`. Export to CSV or PDF.

Auto-expense linking: When a payroll entry's status is set to Paid, a corresponding negative transaction is automatically inserted into the transactions table for that company with the description 'Payroll – [Employee Name]'. The payroll entry stores the linked transaction ID.

## 9. Reports

The Reports Hub at `/reports/hub.php` consolidates all export and reporting functions. Individual report pages can also be accessed directly.

| Field             | Description   |
|-------------------|---|
| Payroll Report    | <code>/payroll/payroll_report.php</code> — Filterable by company and year. CSV and detailed PDF output. Includes gross, deductions, net per employee. |
| Payroll Summary   | <code>/payroll/summary.php</code> — Monthly totals and top-5 earners table.   |
| Payroll Overview  | <code>/payroll/overview.php</code> — Grouped by month and pay period with CSV/PDF export.   |
| Employee Export   | <code>/admin/export_employees.php</code> — All employee records as CSV.   |
| Employee PDF      | <code>/admin/export_employees_pdf.php</code> — Formatted employee list as PDF.  |
| Financial Reports | <code>/reports/index.php</code> — Payroll-linked financial summary with company filter.   |

*Guest Export: If the setting Allow Guest Export is enabled in Admin → Settings, guest-role users can download CSV exports. Disabled by default.*

## 10. Admin Panel

Accessible only to Administrators via the Admin Panel menu in the top navigation.

### 10.1 Settings & Branding

Located at `/admin/settings.php`. Configurable options:

| Field              | Description  |
|--------------------|--|
| Organisation Name  | Appears in the header, all reports, exports, and letters.  |
| Logos              | Separate uploads for light/dark mode and desktop/mobile variants. Supported formats: PNG, JPG, SVG.                                  |
| Favicon            | Browser tab icon. PNG recommended, 32x32px or 64x64px.   |
| Default Theme      | System-wide default. Individual users can override via the header toggle.  |
| Default Company    | Pre-selects a company in dropdowns when a user has access to multiple.   |
| Base Currency      | The currency in which all amounts are stored. Change with care — existing values are not converted.                                  |
| Exchange Rates     | Manual or auto-refreshed rate table. Used by the currency toggle.  |
| Auto-Refresh Rates | Enable to fetch live rates from <code>exchangerate.host</code> on a schedule.  |
| Letter Footer      | Default footer text for generated letters. Supports <code>{COMPANY}</code> , <code>{DATE}</code> , <code>{USER}</code> placeholders. |
| Allow Guest Export | Toggle whether guest users can download CSV exports.   |

### 10.2 User Management

Located at `/admin/users.php`. Create, edit, deactivate, and assign companies to users. Password resets are performed by editing the user record — the system rehashes automatically.

Deactivating vs deleting: Setting a user to Inactive prevents login while preserving their history in the audit log. Deleting a user is irreversible and may orphan audit records — prefer deactivation.

### 10.3 Backup & Restore

Located at `/admin/backup_logs.php`. Folio maintains rolling backups of the SQLite database and key application files. Backups are stored in `backups/`.

- Run Backup — Manually trigger a full system backup. Filename: `office_{type}_backup_{timestamp}.zip`.
- Download Backup — Download any stored backup via `/admin/download_backup.php`.
- Backup Health — SHA-256 integrity check on all stored backups. Mismatches are flagged.
- Backup Retention — Default 30-day retention. Older backups are removed automatically by the integrity check cron.

### 10.4 Schema Migrations

Located at `/migrations/master_migrations.php`. This standalone build uses a single consolidated schema file (`migrate_master_schema.php`). On a fresh install, it runs automatically. Use this page to check status or

re-apply if something went wrong.

Re-apply is safe: All DDL statements use CREATE TABLE IF NOT EXISTS, ALTER TABLE (guarded), and INSERT OR IGNORE — running it again on an existing database adds missing structures without modifying existing data.

## 11. License Activation

Folio requires a valid license key issued at purchase from [cwfms.com](http://cwfms.com). The license gate validates your key against the CWShop license API and caches the result locally for 48 hours. If the API cannot be reached, the cached result is trusted until expiry.

### First-Time Activation

- After installing and completing setup, navigate to any page. If no license is cached you will see the License Required screen.
- Enter your license key in the format CWFMS-XXXX-XXXX-XXXX-XXXX. This key was delivered by email at purchase and is also visible in your customer account at [cwfms.com](http://cwfms.com).
- Click Activate License. Folio contacts the license server, validates the key, and caches the result locally.
- On success you are redirected to the dashboard. The activation screen will not appear again for 48 hours.

### Managing the License

Administrators can view and manage the license from Admin → Settings → License:

| Field            | Description  |
|------------------|--|
| Licensed To      | The email address the license was purchased under.                                 |
| Key              | Masked key shown for reference.  |
| Cache Expires    | When the local cache will next re-validate against the server.                     |
| Force Revalidate | Immediately re-checks the key against the license server and refreshes the cache.  |
| Clear Cache      | Removes the cached token. The activation screen will appear on the next page load. |

*Folio must be able to reach [cwfms.com](http://cwfms.com) outbound over HTTPS for license validation. If your server has an outbound firewall, ensure port 443 traffic to [cwfms.com](http://cwfms.com) is permitted. The 48-hour cache means validation only happens once every two days, not on every request.*

### Lost or Regenerated Keys

If your license key is lost or needs regenerating, log into your customer account at [cwfms.com/account.php](http://cwfms.com/account.php). Generate a new key from the purchases page, then enter it in the Folio activation screen. Only one active install is permitted per license key.

## 12. CWFMS Integration

Folio can optionally connect to CWFMS (CloWel Wealth & Financial Management System) to automatically post payroll expenses when a payroll run is marked as paid. This eliminates double entry between the two systems.

*This integration is completely optional. Both Folio and CWFMS function fully independently. Nothing is sent to CWFMS unless the integration is explicitly configured. If CWFMS is unreachable or not configured, payroll mark-paid completes normally and the push is silently skipped.*

### How It Works

- When a Folio payroll entry is marked as Paid, Folio posts the net pay amount to CWFMS as a negative business transaction (expense) in the mapped company.
- CWFMS records this as a Payroll category expense with the employee name and pay period in the description.
- The push is non-blocking — even if the API call fails, the payroll entry is still marked as paid in Folio.
- A rolling log of the last 10 push attempts is visible in Admin → Settings → CWFMS Integration.

### Setup

Navigate to Admin → Settings → CWFMS Integration and enter:

| Field     | Description  |
|-----------|--|
| CWFMS URL | The base URL of your CWFMS install (e.g. <a href="https://yoursite.com/bo">https://yoursite.com/bo</a> ). No trailing slash. |
| API Key   | Found in CWFMS → Settings → Integrations. The API feature must be enabled in CWFMS first.                                    |

Click Test Connection to confirm the credentials work. Then use the Company Mapping table to link each Folio company to its corresponding CWFMS company folder ID.

### Company Mapping

Each Folio company must be mapped to a CWFMS company ID for pushes to work for that company. The CWFMS company ID is the folder identifier visible in the CWFMS URL when viewing that company (e.g. `20240223_l_d_barbershop_ltd`). Companies without a mapping set are silently skipped.

### CWFMS Requirements

- CWFMS Settings → Features → API must be enabled.
- The API key must have permission to POST to `/api/v1/business/transactions`.
- The CWFMS install must be reachable from the Folio server over HTTPS.

## 13. Currency Conversion

Folio stores all amounts in their original recorded currency. The currency toggle button in the header bar lets every user switch the display currency without reloading the page.

### How it works

- 1. The header injects the current exchange rate table into `window.exchangeRates` from the database settings row.
- 2. The base currency is injected as `window.systemBaseCurrency`.
- 3. Clicking the currency button cycles through: USD → JMD → KYD → CAD → EUR → GBP → USD.
- 4. `window.setCurrency(code)` fires, updates `window.appCurrency`, and dispatches a `currency:changed` custom event.
- 5. All `.money[data-amount][data-currency]` elements are re-rendered using `window.convert(amount, from, to)` and `window.formatCurrency()`.
- 6. All charts listen for `currency:changed` and rebuild with converted data.

### Adding currencies

Go to Admin → Settings → Exchange Rates. Add a new currency code and rate relative to USD (or your base). The currency toggle cycles through a fixed list in the header JavaScript. To add a new currency to the cycle, edit the currencies array in `includes/header.php`.

Important: The base currency setting defines the storage currency for new transactions. Changing the base currency after data has been entered does not retroactively convert stored amounts — it only affects how new entries are interpreted.

## 14. Security & Best Practices

### Authentication

- Passwords are hashed with PHP's `password_hash()` using `PASSWORD_DEFAULT` (bcrypt). Plaintext passwords are never stored or logged.
- Sessions regenerate on every successful login to prevent session fixation attacks.
- CSRF tokens are generated per-session and validated on every POST request.

### File Protection

- The `.htaccess` file blocks direct web access to `data/`, `migrations/`, `logs/`, `backups/`, and `setup/`.
- Each sensitive directory also has its own `.htaccess` with `Deny from all` as a belt-and-suspenders measure.
- The `uploads/` directory blocks PHP execution — uploaded files cannot be executed as scripts.
- The SQLite database (`data/app.db`) is inside a web-blocked directory. Never move it into a publicly accessible folder.

### Output Escaping

- All user-supplied data is escaped with `htmlspecialchars()` via the `e()` helper before rendering in HTML templates.
- SQL queries use prepared statements throughout — no string interpolation in queries.
- File uploads enforce an extension whitelist (PDF, DOC, DOCX, XLS, XLSX, JPG, PNG, CSV, ZIP).

### Error Handling

`display_errors` is off in production (controlled by the `APP_ENV` environment variable). Errors are written to the PHP error log. For development, set `APP_ENV=development` in your server environment.

### Recommended hardening

- Enable HTTPS — uncomment the redirect rule in `.htaccess` after installing an SSL certificate.
- Restrict the `/admin` path by IP if Folio is on a public server.
- Set a strong admin password (16+ characters, mixed case, symbols).
- Run system backups daily and store a copy off-server.
- Review the admin bypass log at `logs/admin_bypass.log` periodically — it records when admins access HR-restricted pages.

## 15. Troubleshooting

| Field  | Description   |
|--|---|
| Blank page after login                       | Check that data/ is writable and that migrate_master_schema.php ran successfully. Set APP_ENV=development temporarily to see the PHP error on screen.   |
| Database initialisation error on setup       | Delete the entire data/ folder and re-upload a clean copy. Ensure the web server user can write to data/ (chmod 775). This is usually caused by a stale or partially-created app.db from a previous failed run. |
| Setup wizard re-appears after login          | The administrator user was deleted or the database was reset. Visit /setup/install.php to recreate the admin account and re-run setup.  |
| License Required screen appears              | Enter your license key (CWFMS-XXXX-XXXX-XXXX-XXXX) from your cwfms.com purchase email or customer account. Ensure the server can reach cwfms.com over HTTPS on port 443.  |
| License activation fails                     | Confirm the server has outbound HTTPS access. Check the key is copied exactly with no extra spaces. Regenerate from cwfms.com/account.php if needed.  |
| CWFMS push not working                       | In Admin → Settings → CWFMS Integration, click Test Connection. Confirm the CWFMS API is enabled in CWFMS Settings → Integrations. Check the push log for the specific error message.                           |
| CWFMS company not receiving payroll          | Confirm the CWFMS Company ID is set in the Company Mapping table (Admin → Settings → CWFMS Integration). The ID must match the company folder name visible in the CWFMS URL.                                    |
| Currency toggle does nothing                 | Open the browser developer console (F12) and look for JS errors. Confirm that exchange_rates in Admin → Settings is valid JSON containing a base key and a rates object.  |
| Charts not rendering on dashboards           | Chart.js loads from cdn.jsdelivr.net — confirm the server has outbound internet access. Also check that canvas elements have the correct data-labels, data-data, data-base attributes.                          |
| Payroll auto-expense transaction not created | The SQLite trigger trg_payroll_mark_paid fires only when paid_status changes to paid (not Paid — case sensitive). Re-apply the master schema if the trigger is missing.   |
| File uploads failing                         | uploads/ and uploads/employees/ must be writable by the web server user. Also check PHP INI values: upload_max_filesize and post_max_size.  |
| 'DB connection failed' on first load         | The PHP pdo_sqlite extension is not enabled. Run php -m   grep sqlite on the server or check phpinfo(). Enable the extension in php.ini and restart PHP-FPM.  |
| Migration runner shows nothing pending       | In this standalone build only migrate_master_schema.php exists. If schema_meta already contains that entry, the schema is fully applied — no action needed.   |
| 403 error on /setup/install.php              | Confirm the main .htaccess has the allow rule for install.php before the block rule for setup/. Also ensure setup/.htaccess is present and allows install.php.  |
| Letter templates show raw placeholder text   | Document templates use PHP string interpolation with \$settings['org_name']. Ensure the settings row (id=1) exists in the database and org_name is not empty.   |

|                                |   |
|--------------------------------|---|
| Admin bypass log growing large | The bypass log only records when an administrator accesses HR-restricted paths. Rotate the log using a cron job or a simple mv command. |
|--------------------------------|---|

### Log files

| Field                     | Description  |
|---------------------------|--|
| logs/admin_bypass.log     | Records when admin users access HR-restricted pages.   |
| logs/backup_integrity.log | Records SHA-256 checks on backup ZIP files.            |
| logs/cron_backups.log     | Records automated backup runs (if cron is configured). |
| logs/cron_integrity.log   | Records automated integrity check runs.                |

For issues not covered here, check the `schema_meta` table in the database for migration history, and the `action_logs` table for recent user actions. Both are accessible from the Admin Panel → Audit Logs page.