Minutes of Meeting

Date and Time	14 May 2025 09:00 PST	Meeting type	Zoom
Organiser	Mr. Rupesh	**Client**	Citywide

Attendees (Internal)
• Rupesh • Kuldeep • Jaspreet • Gurpreet • Sangita • Vishesh
Attendees (Client Side)
• Tom, Teresa, Matt

Agenda
• **Discussions on the following:** ○ High Priority Features ○ Permissions Structure Discussed ○ Instance Request Timelines ○ Scheduling – Open Shifts, Filters, Employee View ○ Confirmation on the Report Approval Process ○ Shift End Process

The following things are discussed:

1. **High Priority Features:**
    a. Tom highlighted five critical features regularly used in demos and sales. These features are currently non-functional or incomplete, despite being primary selling points.
        i. Push notifications (Snitch Time)
        ii. Payroll report integration
        iii. Automatic invoicing
        iv. Geo Scan
        v. Onboarding
    b. Teresa added other issues:

        i. Write-ups not working properly
        ii. Applicant tracking system issues
        iii. Employee profile history within ERM
        iv. Training module missing/incomplete
    c. Snitch Time Notifications – Current Status:
        i. Notifications are only working within the system (system pop-ups), not via email, SMS, or mobile app.
        ii. Tom stressed the need for push notifications to supervisors and guards via SMS or mobile, even if they are offline or not in the system.
        iii. The Dev Team explained:
            1. Mobile push and SMS are implemented, but not usable as the mobile app is not ready.
            2. Email support can be added for missed notifications.
    d. Assignment Notification Failures:
        i. Teresa & Tom flagged a major issue:
            1. Dispatchers and guards not receiving assignment notifications.
            2. Assignments were missing time mappings, which are required for the system to send notifications.
        ii. The dev team explained that a change in the assignment structure (from single to multiple time-based assignments) may have caused existing assignments to lose time settings.

2. **Permissions Structure Discussed:**
    a. Want three primary levels:
        i. Student – Can only view/take assigned courses via My Courses.
        ii. Instructor – Can create/edit courses, assign themselves, and see results for courses they're instructors of.
        iii. Training Admin (System-level) – Full access across all courses, assessments, and analytics.
    b. Want granular access:
        i. Instructors should only see/edit courses they are assigned to.
        ii. Only Training Admins can view/edit all courses.
    c. Want ability to test a course as an instructor by assigning it to themselves and still be able to edit it.
    d. Accept that instructors taking their own course should still receive a certificate.
    e. Want permission conflicts resolved cleanly — i.e., someone being both instructor and student should behave consistently.
    f. Course Editing Rules:
        i. If a course has already been assigned to users:
        ii. Any edit must trigger a versioning prompt.
        iii. Must create a new course/version with a new reference number.
        iv. I want to preserve past records of those who have already completed it.
        v. Instructors should unassign themselves, make edits, then reassign if needed.
        vi. If no one has started the course, allow direct editing without versioning.

g. Instructor Use Case Clarification:
    i. Instructors assigning a course to themselves is acceptable and intended — it's for testing the course setup, not cheating.
    ii. Even if the system awards a certificate after testing their own course, that's fine.
h. Notification Preferences:
    i. Currently, only a yellow strip (in-app) notification exists when someone is assigned as an instructor.
    ii. Client asked if it's possible to add email or other notifications to alert instructors or evaluators.
i. It was suggested to move the ticket to the Upcoming Release list.

3. **Instance Request Timelines:** The dev team has given the timelines for the instance request came in and discussed the requirements for the tickets. Below are the tickets discussed:
    a. Reports count
    b. Single Report sending from the All Reports Listing
    c. ALL - Workers Comp Class code still has TX In label - Pending(TX)
    d. Invictus - Incident Reports (ALL)
    e. weekly OT cut off
    f. Instance specific request (incident form dob and address)
4. **Scheduling – Open Shifts, Filters, Employee View:**
    a. Open Shift Request Flow:
        i. Display open shifts in "My Schedule" for eligible officers.
        ii. Allow officers to request assignment.
        iii. Admin receives notification and approves/rejects.
        iv. Once approved, shifts are assigned and removed from others' views.
    b. No Separate Employee View:
        i. Continue using the existing schedule view with person-based filters.
        ii. Do not implement a separate "Employee View" dashboard.
    c. Experience Filter Logic:
        i. Add filter for "Experience at Client Site" based on 5 completed shifts.
        ii. Must exclude blacklisted users even if they meet shift count.
        iii. Should be configurable (allow client to define the number if needed).
    d. Automatic Assignment on Schedule:
        i. When an officer not assigned to a site/beat is selected from the schedule, the system should auto-assign access.
    e. Availability Logic:
        i. Officers shown as "available" must be free during the selected time slot.
        ii. Experience filters should work as an additional narrowing tool.
    f. Beat-Level Experience for Patrol Officers:
        i. If a patrol officer has experience at beat-level, they should be treated as experienced for all sites within that beat.
    g. Shift Qualifications Filter:
        i. Sites must be updated to associate required permits (guard card, firearm permit, etc.) via services.
        ii. In service creation/edit, add a field for required permits (single or multiple).

iii. Officers must have all required permits on their profile to qualify.
iv. When the “Meet Shift Qualifications” filter is active, only matching officers will be shown.

h. No Overtime Caused Filter:

i. Implement logic to exclude officers who would exceed:
1. Daily
2. Weekly
3. Monthly overtime thresholds

ii. Use the same logic already used to color-code shifts red when assigning.

i. No Double Time Filter:

i. Add a new **optional filter** for “No Double Time”.
ii. When selected, exclude officers who would go into **double time**, but allow those who may hit **regular overtime**.

5. **Confirmation on the Report Approval Process:** The dev team asked if the report approval process needs to be implemented, as discussed previously, to which Tom confirmed that the report approval process is a priority and should be done as soon as possible. It's part of the top four priorities for the project, as it is critical for clients.
6. **Shift End Process:**
   a. The dev team asked if there should be **one button** for both "Submit Report" and "End Shift," as currently there are two separate buttons for this purpose.Clarified that currently, officers must **submit the report** first, and then **end the shift**.Suggested that the End of Shift action should also be treated as submitting the report, since there was confusion in previous cases where reports were submitted but shifts weren’t properly ended.
   b. Tom explained that the End Shift button must remain separate because it is linked to acknowledging the shift statement and is tied to payroll.End the shift is used to close hours for payroll processing, while submitting the report does not equate to ending the shift. He emphasized that the End Shift button needs to be mapped to acknowledge any required statements and must be connected to the attendance for payroll purposes.