

Minutes of Meeting

Date and Time	06 November 2025 09:00 PST	Meeting type	Zoom
Organiser	Mr. Rupesh	Client	Citywide

Attendees (Internal)

- Rupesh
- Kuldeep
- Jaspreet
- Ravinder
- Ajay
- Gurpreet
- Pankaj
- Akash
- Rahul

Attendees (Client Side)

- Tom, Teresa, Matt, Randy

Agenda

- **Discussions on the following:**
 - Discussion on Analytics Design Changes;
 - Discussion on Labor Law Settings and Overtime Logic
 - Onboarding Flow Testing and Issues Identified
 - Upcoming Sprint Implementation
 - Scheduler Enhancements for Admin and Dispatch
 - Sprint Prioritization & Upcoming Tasks
 - Backend Admin Panel & Pending Items
 - Bulk Update Functionality
 - Build Deployment Confirmation

The following things are discussed:

1. Discussion on Analytics Design Changes;

- a. **Presented by:** Jaspreet Kaur
- b. Updated **Analytics UI** to show:
 - i. Current value
 - ii. Previous value
 - iii. Difference
 - iv. Percentage change
- c. Design consistency across all graphs for clarity and performance.
- d. Handling datasets with >10 records: confirmed only key data to be displayed.
- e. **Filter Enhancements:**
 - i. Weekly, Bi-weekly, and Quarterly filters added.
 - ii. Weekly & Bi-weekly filters select one reference date → auto-calculates range.
 - iii. The quarterly filter allows selecting Q1–Q4 per year.
- f. Tom confirmed the design changes and agreed with proceeding to final implementation.
- g. Pending addition of “**Total Balance,**” “**Paid,**” and “**Pass-through Amount**” in next phase (API-level update pending).
- h. **Decision:**
 - i. Analytics design finalized with proposed filter logic and visual changes.
 - ii. API enhancement for billing summary to be included in **next phase**.

2. Discussion on Labor Law Settings and Overtime Logic

- a. **Topic:** Implementation of consecutive days & weekly overtime rules.
- b. **Discussion Points:**
 - i. Consecutive shifts logic to trigger overtime after 4 consecutive days of work in a week.
 - ii. The work week is considered **Monday–Sunday**.
 - iii. Overtime (OT) and double-time (DT) rules to work **independently** unless configured together.
 - iv. If “Double Time after 60 hours/week” is set, system will calculate DT beyond that threshold.
 - v. The rules must **interact but not overlap** (avoid double counting both daily & weekly triggers simultaneously).
 - vi. CommandHub clarified OT rules should reset each week.
- c. **Decision:**
 - i. Adopt **weekly reset logic** (Monday–Sunday).
 - ii. System to support flexible OT/DT combinations as per configuration.
 - iii. Document to be updated confirming agreed rule structure.

3. Onboarding Flow Testing and Issues Identified

- a. **Reported by:** Ravinder Singh
- b. Completed testing for new instance onboarding.
- c. Observed:
 - i. Missing configuration dependencies (e.g., activity codes, service types, assignment templates).
 - ii. Branch switching issues — incorrect or duplicate branch listings.

- iii. Visibility issues between Organizer and Admin roles.
- d. Created a **Branch-Level Testing Checklist** identifying all issues and working components.
- e. Shared report internally; developer alignment planned by tomorrow.
- f. **Decision:**
 - i. One developer to be assigned for **branch switching issue** fixes by **tomorrow**.
 - ii. Checklist to be shared with CommandHub for visibility.
- g. **Proposed Improvements to Instance Setup Workflow**
 - i. **Proposal A (by Jaspreet):**
 - 1. During first login, show a **setup completion screen** (similar to LinkedIn profile setup progress).
 - 2. Display all required setup items (Activity Codes, Services, Templates, etc.) on one page.
 - 3. System allows saving all configurations in one go before first use.
 - ii. **Proposal B (by Tom):**
 - 1. Include **default “Example” entries** (employee, client, activity code, etc.) in every new instance for guidance and testing.
 - iii. **Decision:**
 - 1. Combine both approaches:
 - a. Guided setup screen for mandatory configurations.
 - b. Default example data for reference and initial functionality.
 - i. Implemented in **next sprint cycle**.
- h. **Development Plan and Timelines**
 - i. **Discussion:**
 - 1. Flow change implementation to be handled post current sprint.
 - 2. Current sprint work already completed; next sprint starts **10th November**.
 - 3. Next build planned by **20th November** with:
 - a. Branch issue fixes
 - b. Onboarding flow adjustments
 - c. Partial implementation of guided setup
 - 4. Tom emphasized the need for **clear and direct timelines**.
- i. **Instance Availability & Onboarding Time**
 - i. Currently, **5 ready-to-use trial instances** are available for new client onboarding.
 - ii. For a **new instance setup**:
 - 1. 4 days if building from scratch.
 - 2. 2 days if using pre-tested existing trial instances (after domain & configuration update).
 - iii. Tom stressed the importance of having a fixed onboarding SLA.
 - iv. **Decision:**
 - 1. **Standard Onboarding Timeline:**
 - a. 2 Days → Using ready instances
 - b. 4 Days → For new instance setup
 - c. QA verification mandatory before handover to client.

4. Upcoming Sprint Implementation

- a. Jaspreet shared the **tentative list of items** planned for the next sprint starting Monday:
 - i. **Admin Panel Phase 2** – continuation of previous sprint.
 - ii. **Analytics (Enhanced Version)** – includes ATS, Training, KPI dashboards integrated into the main analytics module.
 - iii. **Primary vs Backup Units in Calls** – enhancement for call handling.
 - iv. **Primary and Secondary Activity Codes** – addition within call records.
 - v. **System Enhancements for Instance Onboarding** – checklist to be shared by Ravinder.
 - vi. **Admin and Dispatch Service in Site Module** – new scheduling component.
- b. Feedback and approval awaited for **P2 and PSL** before including them in the sprint.

5. Scheduler Enhancements for Admin and Dispatch

- a. Tom confirmed the need for a **new service type “Admin”** within the scheduler, similar to *Stationary* and *Mobile*.
- b. The new **Admin selector** should appear on the scheduler and site notes screens, linked with the **service type**.
- c. Functionality of the Admin site will **mirror Stationary** (same scheduling behavior).
- d. Admin and Dispatch roles need to be visible in scheduling with appropriate permission mapping.
- e. **Role-based Access and Site Assignment Logic**
 - i. **Field Officers** → Identified by *Change Site Permission*.
 - ii. **Dispatch Officers** → Identified by *Status Tab Permission*.
 - iii. **Admin Users** → Identified by access to *Company Settings* and *Employee Management*.
 - iv. Jaspreet highlighted that assigning admins to sites requires workflow changes in employee role handling.
 - v. Tom clarified that:
 - 1. The **Admin service type** should represent *company-level admin* (not site-specific).
 - 2. Admins may be assigned to a *default “Office” site* that is **non-billable**.
 - 3. Hours logged under “Office” sites are for *operational tracking only* and not billed to clients.
- f. **Dispatch Scheduling & Permission Handling**
 - i. CommandHub raised concerns on adding **dispatchers** to schedules:
 - 1. Current logic blocks them since dispatchers have higher-level permissions.
 - 2. They can’t be assigned as *Stationary* or *Patrol Officers* due to permission restrictions.
 - ii. The dev team proposed:
 - 1. A **global-level permission override** for dispatchers and admins, allowing them to appear in all site schedules.
 - 2. Dispatch and Admin personnel can be given **universal scheduler visibility** without explicit site assignment.
- g. **Workaround for Current Scheduling Limitation**

- i. Tom proposed a **temporary solution**:
 1. Create a **non-billable “Office” site** in each branch.
 2. Schedule dispatchers/admins under this site for shift tracking and payroll purposes.
 3. Add a **checkbox “Non-Billable”** in the site configuration.
 4. This ensures these shifts don’t count toward contracted/billable hours.
 - ii. Admins/Dispatchers can:
 1. Log in as **Field Agent** to check in/out.
 2. Switch to **Admin access** for operational tasks.
 3. This dual-role approach allows check-in tracking and scheduling visibility.
- h. Implementation Notes**
- i. Teresa suggested making **billing type optional** – if left blank, the site is treated as non-billable.
 - ii. Tom emphasized:
 1. Each **branch should have one “Office” site** marked as non-billable.
 2. Any shifts under that site should automatically exclude from contracted hours.
 - iii. Kuldeep added that instead of creating multiple service types, a **single checkbox (“Admin Site”)** would suffice for identification.
 - iv. Jaspreet suggested adding **Admin** as a third service type alongside Stationary and Mobile:
 1. Admin coverages would not count toward available or billable hours.
 2. The UI will reflect this distinction in the scheduler.
- i. Decisions Made**
- i. A new **service type: “Admin”** will be added in the scheduler.
 - ii. **Non-billable flag (checkbox)** to be implemented in site creation for office/admin sites.
 - iii. **One default “Office” site per branch**, to track admin/dispatch shifts.
 - iv. **Dispatchers and Admins** to have **global scheduling access** (not site-specific).
 - v. **Temporary workaround** (dual-role login) approved until final workflow is developed.
 - vi. Billing logic:
 1. *Blank billing type → Non-billable*
 2. *Defined billing type → Billable*
- j. Site and Admin Setup Discussion**
- i. **Discussion:**
 1. The “Admin” type of site will function the same as other service sites but will not be billable.
 2. Both parties agreed this setup aligns with the original intention.
 - ii. **Outcome:**
 1. Admin sites to remain non-billable while retaining all other functionalities.
- k. Permission Level Reassessment**
- i. **Topic:** Admin and Field Officer Permissions

1. Discussion

- a. Current permission levels are restricted between “Admin” and “Field Officer.”
- b. A workaround for smoother permission handling will be explored.
- c. Question raised on whether an Admin can access other admin functionalities without switching interfaces.
- d. Tom mentioned interface switching is acceptable given the dispatch workflow involves multiple screens.

2. Decision:

- a. Switching interfaces is acceptable for dispatchers.
- b. The dev team to explore simplifying permission transitions where possible.

l. Dispatch Workflow Clarification

- i. **Topic:** Implementation for Dispatch Coverage
- ii. **Discussion:**
 - 1. Dispatchers to be treated as stationary officers for coverage and scheduling.
 - 2. When dispatchers clock in via mobile app (as field officers), they will leave their desktop active for dispatch operations.
- iii. **Action:**
 - 1. Tanya to create a “Dispatch” site and configure coverage and schedules for dispatchers following this workflow.

m. End Coverage Date for Admin/Dispatch Sites

- i. **Discussion:**
 - 1. Organizer queried if end coverage dates are required for admin/dispatch sites.
 - 2. Decision made to maintain consistency with other site types by keeping end coverage fields active.
 - 3. This ensures continuity and ease of copying or duplicating coverage configurations.

n. Coverage End and Schedule Handling

- i. **Topic:** Managing Coverage End Dates and Scheduler Visibility
- ii. **Discussion:**
 - 1. When coverage ends or is canceled, existing schedules were being removed from view.
 - 2. Clarified that:
 - a. End date triggers a 7-day grace period before removal from the scheduler.
 - b. Past coverage can still be viewed via “Active/Inactive” filters or archives.
 - c. Deleting records removes them from both active and archive views.
- iii. **Decision:**
 - 1. End coverage dates will continue to be used for better historical visibility.
 - 2. A new **Active/Inactive filter** to be added to differentiate ongoing and completed coverage.

o. Schedule Sorting Improvements

- i. **Topic:** Sorting and Readability for Coverage and Shifts
- ii. **Discussion:**
 - 1. Teresa requested sorting improvements to display shifts in order of start times.
 - 2. The current system sorts by creation date (latest first), causing confusion in reading coverage order.
 - 3. Tom emphasized schedules should be sorted chronologically within each site — from earliest to latest shift start time.
- iii. **Decision:**
 - 1. Sort order within each site to be changed to “Start Shift Time (Earliest to Latest).”
- iv. **Action:**
 - 1. The dev team updated sort logic accordingly.

6. Sprint Prioritization & Upcoming Tasks

- a. **Topic:** Next Sprint Planning
- b. **Discussion:**
 - i. The current sprint has 6–7 prioritized tasks; post that, priorities for remaining tickets are pending.
 - ii. Teresa has not yet updated the trailer sheet with upcoming priorities.
- c. **Action Items:**
 - i. Jaspreet to follow up with Teresa early next week to finalize and update the priority list.
 - ii. Ravinder to coordinate one-on-one if required.

7. Backend Admin Panel & Pending Items

- a. **Discussion:**
 - i. Tom emphasized the need to complete core functionality, bug fixes, and critical feature enhancements before focusing on UI improvements.
 - ii. Once stabilization is done, backend admin module should be finalized.
 - iii. Jaspreet confirmed **two dedicated resources** are working on Admin Panel Phase 2, and development is ongoing.
- iv. **Action:**
 - 1. The dev team to resend the list of pending items to Tom and Teresa for review.

8. Bulk Update Functionality

- a. **Topic:** Attendance Check-In and Check-Out Logic
- b. **Issue:**
 - i. Bulk check-ins for multiple past dates cause multiple pop-ups for unclosed shifts when the officer logs in next time.
- c. **Discussion:**
 - i. Tom clarified it’s logical for the system to prompt users to close past shifts individually since one cannot be at multiple locations simultaneously.
 - ii. Each pop-up ensures the user properly closes all pending shifts.
 - iii. To prevent confusion, system should enforce mandatory closure before new shift starts.
- d. **Decisions & Actions:**
 - i. Retain the pop-up warnings for each unclosed shift.
 - ii. Add a **mandatory response** (no “X” close option) before the user can proceed.

- iii. Dispatch retains the ability to manually force logouts if required.
- iv. Status tab and dispatch views will reflect these unclosed shifts accurately.

9. Build Deployment Confirmation

a. Discussion:

- i. Jaspreet mentioned that the planned build deployment for today was on hold as there was no confirmation from Teresa's end.
- ii. Tom stated that Teresa might have been preparing for it and requested the dev team to stay on standby for a few minutes.
- iii. Ravinder and Organizer discussed the timing, confirming that this period falls under peak working hours.
- iv. It was mutually agreed that the build update will be rescheduled.

b. Decision:

- i. The **build deployment will be moved to tomorrow** after receiving confirmation from Teresa.
- ii. Team to remain on standby for further instructions from CommandHub.



