

Minutes of Meeting

Date and Time	6 August 2025 09:00 PST	Meeting type	Zoom
Organiser	Mr. Rupesh	Client	Citywide

Attendees (Internal)

- Kuldeep
- Jaspreet
- Sangita
- Vishesh
- Akash
- Ravinder
- Amit

Attendees (Client Side)

- Tom, Teresa, Matt, Randy

Agenda

- **Discussions on the following:**
 - Employee Help and support Demo
 - Report Approval Process Demo
 - Leave Request History Enhancements
 - UI/UX Feedback
 - PTO (Paid Time Off) & Sick Pay (Sick Leave) Feature Requirements
 - Mass Email “Reply-To” Field Issue
 - Mobile App Build Update (TestFlight)
 - Training Module Testing

The following things are discussed:

1. Employee Help and support Demo:

a. Editability of Complaints:

- i. **Initial Functionality:** Employees could edit submitted complaints.
- ii. **Decision:**
 1. **Editing original complaints will be disabled.**
 2. **Users can add follow-up comments/notes** post-submission for clarification.
 3. Complaints **cannot be deleted.**
 4. **Withdrawal of complaint** will be allowed, but it must be recorded. Upon withdrawal:
 - a. The system should log the action.
 - b. A comment can optionally be added by the employee.
 - c. Complaint remains visible as “Withdrawn,” not removed from system.

b. Admin Permissions:

- i. **Admin Role Clarified:**
 1. Admins can **reassign complaints** or investigations.
 2. Admins **cannot edit** the original complaint content or submitter’s details.

c. Complaint Filtering and UI Changes

- i. Current filters (e.g., All Requests, My Requests, Assigned Requests) were reviewed.
- ii. **Decision:**
 1. Filters should remain on the current page.
 2. Option to **move filters to the sidebar** or position **above table columns** will be explored with the UI designer.
 3. **Naming Update:** Rename “**Help and Support**” to “**Team Support**” to avoid conflict with the client-facing section.

d. Complaint Templates / Topics

- i. The original setup used a "Select Template" dropdown.
- ii. **Decision:**
 1. Change label from “**Select Template**” to “**Subject**”.
 2. Dropdown will serve a dual purpose: choosing complaint type and generating relevant forms.
 3. If "Other" is selected, a freeform comment box should appear.

e. Anonymous Complaints

- i. **New Requirement Introduced:**
 1. Allow users to **submit complaints anonymously.**
 2. If anonymous:
 - a. The **admin interface must not reveal identity.**
 - b. **Follow-up response will not be possible;** it’s a one-time submission.
 3. Include an explanatory note: “By submitting anonymously, follow-up communication will be disabled.”
- ii. **Form Field Adjustments**
 1. **First/Last Name:** Not needed on the complaint form as it’s

already associated with the logged-in profile.

f. Site Information in Complaint Requests:

i. Discussion:

1. Jaspreet asked whether a request/complaint can be associated with a site.
2. Teresa confirmed it is useful but should **not be a required field**.
3. Use cases discussed:
 - a. Complaint against a **property manager** or a **vendor** on site.
 - b. Enables **location-based analytics**.

g. Template Behavior in Forms

i. Current Issue:

1. "To" and "CC" fields are appearing **after** selecting the template.

ii. Resolution:

1. Fields can exist as **empty input placeholders** and populate **dynamically** once a template is selected.
2. This logic is preferred since templates define recipient roles and visibility.

h. Handling "Other" Template Selection

i. Kuldeep's Question:

1. What happens if "Other" is selected?

ii. Response:

1. Users can **manually select** recipients from a dropdown list of **potential managers** when "Other" is chosen.

i. Manager List Formatting

i. Tom's Feedback:

1. Manager list should include:
 - a. **Rank** (e.g., "Captain William Drake").
 - b. **First Name and Last Name**.
2. **Badge numbers** are **not necessary**.

ii. Job Titles Clarification:

1. Ranks should reflect role hierarchy, e.g., CEO or Chief depending on the organization.
2. For external clients (civilian companies), rank titles should be **customizable**.

j. Enhancements and Admin View

i. Discussion:

1. Jaspreet asked if any more Employee help and support-related changes were needed.
2. Tom requested to review the **admin side view** when a complaint is submitted:
 - a. How the complaint flows.
 - b. What actions are available to the admin post-submission.
3. Jaspreet to check status and update accordingly (feature still in development).

k. Site Input on Request Forms

- i. **Discussion:** Site information can be added optionally in the complaint/request form.
- ii. **Use Case:** Complaint against property manager or other vendor at a site.
- iii. **Decision:** Site should not be a mandatory field but useful for analytics.

l. Template Handling in Forms

- i. **Issue:** To & CC fields appear only after selecting templates.
- ii. **Suggestion:** Inputs can be empty until the template is selected.
- iii. **Decision:** Keep it as-is; templates trigger relevant recipient options.

m. Email Field Behavior (To/CC)

- i. **Scenario:** When "Other" is selected in template, users should be able to choose from all potential managers.
- ii. **Additional Requirement:** Manager names should display rank/title (e.g., Captain William Drake).
- iii. **Conclusion:** No need for badge numbers—rank, first name, and last name are sufficient.

n. Notifications

- i. **Requirement:** Any update to a complaint/request should trigger notifications to all involved parties.
- ii. **Improvement Needed:** Notifications for new messages in active chats to avoid manual checking.
- iii. **Suggested Wording Change:** Replace "New request assigned" with "Team support has been assigned to you."

2. Report Approval Process Demo

a. Report Approval Setting:

- i. **Decision:**
 - 1. Add a company-level global setting for report approval.
 - 2. If selected, all site reports require approval.
 - 3. Option to override per site remains.
- ii. **UI Placement:** Checkbox will be added under **HR Configurations** in company settings.

b. Report Status & Actions

- i. **Statuses Available:** Submitted, Approved, Rejected, Resubmitted.
- ii. **Admin View:** Ability to filter and bulk approve/reject reports.
- iii. **Requirement:**
 - 1. Provide **Approve/Reject/Edit** options directly from the main report list view.
 - 2. Avoid extra clicks—enable in-place approval actions.
- iv. **Officer Flow:** Rejected reports show rejection reason; officer can revise and resubmit.

c. Report Approval/Reject Functionality

- i. **Current Capability:** Admin can view, approve, or reject reports.
- ii. **Enhancement:** Add **approve/reject** buttons inside the **viewer mode** for easier access.
- iii. **Prompt Requirement:** On rejection, a reason must be entered; this message should be visible to employees.
- iv. **Approval Path:**
 - 1. Approved reports are finalized.

2. Rejected reports move to the employee's **"My Reports"** section with a "Rejected" status.

d. Admin Editing Rights

- i. **Confirmed:** Admins can **edit** reports even if approval is required.
- ii. **Logging:** All admin edits must be logged for audit purposes with timestamps.

e. Employee View After Rejection

- i. **Rejected Report Visibility:** Rejected reports are visible under the employee's **"My Reports"** with a "Rejected" tag.
- ii. **Enhancement Required:**
 1. Always display the **Status** column in the reports list.
 2. Show rejection message, date/time, and the person who rejected.
 3. Add **edit button** within the viewer mode for easier employee access.

f. Report Resubmission Flow

- i. **Process:**
 1. Employee views rejection message.
 2. Edits the report using the **Edit** button (preferably in viewer).
 3. After editing, click **"Save and Resubmit"**.
- ii. **Clarification:**
 1. Simply editing is **not enough**—must explicitly press **resubmit**.
 2. After resubmission, report status changes to "Resubmitted".
- iii. **Confirmation:** No need for an extra prompt to confirm resubmission—it should be handled by the **"Save and Resubmit"** action.

g. Admin Handling of Resubmitted Reports

- i. **Admin View:** Resubmitted reports are flagged for re-approval.
- ii. **Action:** Admin reviews, approves or rejects again. Once approved, it gets included in the final PDF report.

h. Audit Log / Activity History

- i. **Enhancement:** Under viewer, show logs with:
 1. Status history (Submitted → Rejected → Resubmitted, etc.)
 2. Messages entered during rejection
 3. Date/time stamps
 4. Responsible person (who rejected/approved)

3. Leave Request History Enhancements

a. Leave Approval History:

- i. Officers can edit their leave after approval.
- ii. Full history is maintained showing the sequence: applied → approved → updated → re-approved.

b. Display Requirements:

- i. Approval/decline status to be shown along with the name of the admin performing the action.
- ii. Additional column to be added for *total days off requested*.
- iii. Fields finalized: Officer Name, Badge Number, From Date, To Date, Total Days, Leave Type, Status (Approved/Declined), Approved/Rejected By, Description.

c. Handling Long Leave Messages:

- i. Messages submitted by officers as part of leave request will be hidden in the main view.
- ii. Each leave request row will be clickable (hyperlink) to open full details including the long message.
- iii. This avoids clutter and maintains a clean UI.

d. Historical Trail:

- i. Snapshot view will show relevant history events only (e.g., "Leave message updated by Admin Tom").
- ii. Full detail accessible via drill-down view.

4. UI/UX Feedback

a. Listing and Filters

- i. Breadcrumbs, notification icons, and filters to be consolidated at the top for cleaner layout.
- ii. Filters will be hidden by default and shown on click.
- iii. New listing view to reduce dead space and improve usability.
- iv. Teresa raised a concern that the UI appears zoomed-in and cramped — needs adjustment for better visibility (especially on 75% zoom screens).

b. Route Separation(open calls/past calls)

- i. Proposal: Split “Open Calls” and “Past Calls” into separate sections under a new main menu “Operation Hubs”.
- ii. Purpose:
 - 1. Improve navigation clarity.
 - 2. Avoid loading all data at once, which delays page load.
- iii. Clarified by Jaspreet: This change won't impact load time directly but will visually and structurally simplify the UI.
- iv. Teresa inquired about speed improvement; Jaspreet confirmed backend optimizations are in progress to enhance performance.

c. Site Update Performance Issue

- i. Major concern raised by **Tom** about the long **delay** in updating a site during live demos.
- ii. Demonstrated poor response time during site update, causing awkward pauses mid-demo.
- iii. **Kuldeep** explained:
 - 1. The site module is partly migrated; remaining issues are related to field mapping (e.g., responding agency).
 - 2. Old Laravel-based pages are the root cause of current slowness.
- iv. **Rupesh's** Input:
 - 1. Emphasized urgency of fixing the slowness.
 - 2. Team instructed to:
 - a. Investigate the performance bottlenecks.
 - b. Prioritize conversion and optimization of the site update page.
 - c. Provide clear timeline for full migration and resolution.

5. PTO (Paid Time Off) & Sick Pay (Sick Leave) Feature Requirements

- a. **Objective:** To build a system to manage and track PTO and Sick Pay

balances for employees.

b. Key Requirements:

- i. PTO and Sick Pay accrual should be based on hours worked (e.g., 1 hour of PTO earned for every 8 hours worked).
- ii. There should be caps on accruals (monthly/yearly), but these limits should be optional (i.e., not mandatory fields).
- iii. The accrued balances should reflect live updates (real-time tracking).
- iv. Employees should be able to:
 1. View their current PTO and Sick Pay balances on their profiles.
 2. Submit requests for time off directly from their profiles.
 3. Withdraw or request usage of the hours accrued.
- v. **Approval Workflow:**
 1. Approvers with the correct access level will receive a notification for each request.
 2. Once approved, the amount should be added automatically to the employee's next payroll.

c. Settings & Configurations:

- i. PTO/Sick Pay rules should be configurable at:
 1. **Company Level**
 2. **Branch Level** (to accommodate state-wise labor laws)
 3. **Employment Type Level** (e.g., full-time, part-time, union employees)
- ii. The system should support multiple time-off types (e.g., PTO, Sick Leave, Vacation, Holiday), and naming should be customizable.
- iii. Accrual calculations must map against employee schedules and logged hours.

6. Mass Email "Reply-To" Field Issue

- a. **Issue:** Emails were being sent without a "reply-to" address, causing them to default to CommandHub's email address.
- b. **Cause:** The mass email feature did not require a reply-to field, unlike the report emailing system.
- c. **Fixes Implemented:**
 - i. "Reply-To" is now a **mandatory field** for mass emails.
 - ii. If not filled, **email will not be sent**.
 - iii. Email logs are now being managed for mass emails.
- d. **Clarification:**
 - i. **Mass Email "Reply-To" and Company Config Email for Reports** are two separate configurations.
 - ii. "From" email will still originate from the company configuration, but the "Reply-To" will depend on the client's mass email settings.
- e. **Next Steps:**
 - i. Prevent **any email** from being sent if the company email configuration is missing.
 - ii. Ensure all clients' emails originate from their respective accounts, not CommandHub's server.
 - iii. Apply the **same compliance checks** for mass emails as with report emails.
 - iv. Enforce reply-to as a required field across **all client accounts**.

f. Bug Resolution Timeline

- i. This email-related issue is one of the **critical bugs** to be completed **by Saturday**.
- ii. Kuldeep confirmed the bug has already been fixed.
- iii. Final build release will include this fix and will be shared for QA/testing.

7. Mobile App Build Update (TestFlight)

- a. A new build (v36) is available for testing on TestFlight.
- b. Teresa confirmed receipt of version 35; team clarified she needs to install **version 36**.
- c. Release email with **release notes** to be sent by Jaspreet.
- d. Build includes:
 - i. Updated forms and reports
 - ii. Red mode
- e. Planned Delivery:
 - i. Final mobile build targeted for **10th August (morning)** to align with the client's launch schedule.
 - ii. Alternate delivery by **late night on 9th August** if required.

8. Training Module Testing

- a. **Pending Update from:** Randy Nunez
- b. Randy confirmed he will complete testing today.
- c. The previous delay was due to Wi-Fi issues while moving.

