

## Minutes of Meeting

<b>Date and Time</b>	05 June 2025 09:00 PST	<b>Meeting type</b>	Zoom
<b>Organiser</b>	Mr. Rupesh	<b>Client</b>	Citywide

### Attendees (Internal)

- Rupesh
- Kuldeep
- Jaspreet
- Gurpreet
- Sangita
- Vishesh
- Avinash
- Akash
- Ajay
- Amit

### Attendees (Client Side )

- Tom, Teresa, Randy, Matt

### Agenda

- **Discussions on the following:**
  - Payroll Discussions
  - Closed Server Discussion
  - Command Hub Admin Panel for Billing & Usage
  - ERM Enhancements
  - Form Builder & Use of Force Report
  - Mobile App Status
  - Backlog & Feature Prioritization
  - Priority Feature Updates

### The following things are discussed:

#### 1. Payroll Discussions

##### a. Payroll Report Demonstration

- i. Kuldeep shared a demo of the payroll reporting feature under the scheduling tab.

- ii. The current implementation allows generation of **PDF and CSV reports** from the scheduler based on sample formats provided by Teresa.
- b. Confusion Around Payroll Report Location**
  - i. **Concern raised by Teresa:** It's counterintuitive to generate payroll reports from the scheduling tab.
  - ii. **Suggestion:** Payroll reports should be accessible directly from the payroll module, not scheduling.
  - iii. **Action:** Organizer acknowledged and agreed to **move the CSV export functionality to the payroll section.**
- c. Current Limitations Identified**
  - i. Teresa could not test the payroll system as **auto-generated reports are not yet appearing.**
  - ii. Inability to select **multiple departments** when generating payroll reports.
  - iii. The existing system only allows generating reports one department at a time.
  - iv. Payroll reports should be usable for:
    - 1. Full cycle exports (after payroll closes).
    - 2. Manual off-cycle calculations (e.g., for terminations).
- d. Required Changes and Improvements**
  - i. Move CSV export from scheduling to payroll tab.
  - ii. Maintain **PDF reports** for ad-hoc or off-cycle use within the scheduling tab.
  - iii. Enable **multi-department report generation.**
  - iv. Allow **post rate mapping** and implement visibility/access restrictions to sensitive payroll data.
- e. Auto-generation and Scheduling**
  - i. Payroll is currently auto-generated based on a fixed **pay date (e.g., 25th of the month).**
  - ii. **Issue:** This timing is too late for payroll processing needs.
  - iii. **Decision:** Kuldeep will modify the cron job so payroll is generated the day **after the pay period ends** (e.g., 16th and 1st of the month).
- f. Immediate Tasks and Timeline**
  - i. **By Tomorrow (June 7):** Manually run payroll for May 16–31 via API to allow testing and comparison with existing systems.
  - ii. **By June 16:** System should auto-generate payroll for June 1–15.
  - iii. **Weekend Build:** Move necessary changes (filters, CSV export, date range selection) to production.
- g. Data and Privacy Concerns**
  - i. Payroll data (including pay rates) needs to be entered for each employee profile.
  - ii. Access to payroll data should be limited to specific roles (e.g., Teresa and Tom).
- h. Client Matching**
  - i. Client names/numbers in the system should match exactly with **QuickBooks.**
  - ii. Need to cross-verify client info and ensure service rates (post rate) are configured correctly.

## 2. Closed Server Discussion

### a. Closed Server Setup for security sensitive client

- i. **Client Requirement:** Some clients (e.g., law enforcement, casinos) require closed/on-premise servers for data privacy/security.
- ii. **Concerns:** How to support, update, and bill these clients while respecting their restrictions.
- iii. **Feasibility:**
  1. Possible to deploy Command Hub codebase on client's internal servers.
  2. Remote setup possible if one-time access is provided.
  3. If remote access is denied, physical deployment will be necessary.
  4. Future support/update can be requested with access temporarily reinstated.
- iv. **Conclusion:** Technically feasible. Requires clear documentation and environment compatibility. Organizer to send Teresa and Tom a questionnaire/form for assessing infrastructure.

### b. Billing for Closed Server Clients

- i. **Billing Structure:** Only charge for software license, code, and support.
- ii. No server/cloud hosting costs to be included.
- iii. **Matt's input:** Not available in the call. Further discussion may be required.
- iv. **Action:** Research reduced billing model and document approach.

## 3. Command Hub Admin Panel for Billing & Usage

### a. Teresa's Requirement:

Ability to view all clients, user types (admin/dispatcher), scheduled hours to ease billing.

### b. Current Status:

- i. Admin Panel feature discussed before but not yet implemented.
- ii. The dev team confirmed it is planned, and a dedicated team will be assigned.

### c. Timeline:

Planning and timeline to be shared in next Tuesday's follow-up meeting.

## 4. ERM Enhancements

### a. Current Status:

In staging environment, pending testing by Teresa.

### b. Planned Go-Live:

Can move to production after validation.

### c. New Feature Request:

Internal complaint system for employees.

- i. Employees should be able to submit complaints (e.g., harassment, hostile work environment).
- ii. Assigned HR investigator, investigation flow, result logging required.

### d. Discussion:

May be added **post-ERM release** as an additional feature.

### e. Action:

Ticket to be created under "New Features."

Teresa and Tom to finalize complaint types and workflow.

## 5. Form Builder & Use of Force Report

### a. Client Request:

Some clients asked for a **Use of Force Report** form.

### b. Proposed Solution:

Use existing **assignment template builder** as a form builder.

- i. Users can create their own forms (e.g., harassment, use of force, incident).

- ii. Ability to print/view report formats remains a consideration.

**c. Action Items:**

- i. Teresa to **compile form content** from prior submissions (e.g., Randy's and ESF's versions).
- ii. Team to **replicate form builder UI** under "Forms" section.
- iii. Teresa and Tom to work on final mockup/design and send to the dev team.

**6. Mobile App Status**

**a. Update:**

- i. The app is **approved on both Play Store and App Store**.
- ii. Awaiting final production testing and some approvals from Tom's end.

**b. Action Item:**

- i. Final testing and production push to be completed after approval.

**7. Backlog & Feature Prioritization**

**a. Agreement:**

- i. A **new tab** will be added to the existing Excel file listing:
  - 1. Backlog items
  - 2. In-progress features
  - 3. New feature requests
- ii. Shared prior to next meeting for **priority sorting**.

**b. Action Items:**

- i. DITSTEK to share updated Excel.
- ii. Tom and team to review and assign priorities.

**8. Priority Feature Updates**

**a. Top Priorities Identified:**

- i. **Payroll Module** – Priority 1, due to high monthly costs and operational need.
- ii. **Scheduling Enhancements** – Including filters and open shift requests.
- iii. **Report Approval Workflow**
- iv. **Shift Acknowledgement by Agents**
- v. **Split Beat Feature** – Development completed; currently in testing.

