Minutes of Meeting

Date and Time	26 November 2025 09:00 PST	**Meeting type**	Zoom
Organiser	Mr. Rupesh	**Client**	Citywide

Attendees (Internal)

- Kuldeep
- Jaspreet
- Rahul
- Pankaj
- Ajay
- Anshul
- Babita
- Vishesh
- Ravinder

Attendees (Client Side)

- Teresa, Matt

Agenda

- **Discussions on the following:**
  - Update on Analytics Module
  - User Tracking Module – Demo & Feedback
  - KPI Module Demonstration
  - PSSP Discussion & Prioritization
  - Sprint, Priority & Ticket Management

The following things are discussed:

1. **Update on Analytics Module:**
    a. **Status**
        i. Analytics is already deployed on production.
        ii. The team verified data and reviewed screens.
        iii. QA shared initial feedback; fixes have been taken care of and an updated build will be posted by tomorrow.
    b. **Issues Reported**
        i. Teresa reported significant data inconsistencies.
            1. Example: Site coverage showing only **4 sites**, though more sites have valid service assigned.
            2. Multiple values not correlating accurately across tabs.
    c. **Ticketing Approach**
        i. Tom asked Teresa to log issues ticket-by-ticket.
        ii. Kuldeep recommended tab-wise ticketing:
            1. Company
            2. Client
            3. Employee
        iii. Teresa agreed to this approach.
2. **User Tracking Module – Demo & Feedback**
    a. **Demo Highlights**
        i. Ability to select a user and visualize:
            1. Movement path with play animation
            2. Speed options (1x, 2x, 3x, 4x)
            3. Activity markers and logs
            4. Idle status indicator
        ii. Option available for screen recording of the playback.
    b. **Speed Enhancement Requirement**
        i. Tom requested:
            1. Entire shift playback should ideally be reviewed in 60 seconds.
            2. Need faster speed options (8x, 10x) if possible
        ii. Team to perform R&D based on current library capabilities.
    c. **Idle Tracking Logic**
        i. Existing Logic
            1. Idle is currently marked when:
                a. No reports/actions performed within a radius.
                b. System logs repeated "ping" points.
        ii. Updated Logic (Decision Points)
            1. Idle Radius Standardization
                a. Teresa initially suggested different radii for standing vs patrol officers.
                b. Tom finalized:
                    i. **200 feet radius** for *all* officers.
                    ii. If within 200 ft: marked idle
                    iii. If beyond 200 ft: marked active/moved
            2. Idle vs Active Naming
                a. The current "idle" label is misleading because it marks

no-action instead of no-movement.

b. New requirement:

i. "Idle" = no movement within 200 ft

ii. "Active" = moving but not performing actions

3. Idle Time Tracking

a. System must show:

i. "Idle from 9:13 AM – 10:13 AM (60 minutes) at this location"

b. Idle periods should be represented using a grey balloon on the timeline/map.

4. Configurable Idle Threshold

a. Organizations should be able to define:

i. **Idle threshold duration** (e.g., 10/15/20 minutes)

b. New setting required under User Tracking Settings.

d. Pin & Movement Display Improvements

i. Tom wants to remove the grey pins (2–20 pings) from the map.

ii. Keep only:

1. The movement **trajectory line**
2. Activity markers (1, 2, 3…)

iii. This reduces clutter and improves readability.

e. Playback Controls

i. Enhancements requested:

1. Stop button
2. Pause button
3. Ability to scrub/seek through the playback timeline
   a. Drag-select specific time positions like a video timeline
4. Jaspreet to explore feasibility with current libraries.

3. KPI Module Demonstration

a. Overview of KPI Concept

i. KPI (Key Performance Indicator) settings are department-based.

ii. Departments are listed under the **Settings** section.

iii. Users can:

1. View assigned KPIs per department.
2. Add or adjust KPIs and rules.

b. Rule Types: There are two categories of rules:

i. System-Generated / Automatic Rules

1. Pulled from ERM (Employee Remark Module).
2. Automatically appear in the KPI rule list.
3. Cannot be deleted.
4. Reward/Penalty configuration is system-driven and appears enabled.

ii. Manual Rules

1. Created manually via Add KPI Rule.
2. Displayed with rule type = Manual.
3. Users can delete these rules.
4. Reward/Penalty fields are disabled during creation.
   a. These are added only when the rule is achieved (from employee performance screen).
5. Example: Body Camera Usage.

c. **KPI Duration Types**
    i. Daily
    ii. Weekly
    iii. Monthly
    iv. Custom (varies per rule)

d. **Viewing KPI Rule Assignments**
    i. On the Employee KPI section:
        1. Users can see both manual and automatic rules.
        2. Targets are displayed (e.g., Manual Rule – Target 3).
        3. Manual KPIs show rule type as **Manual**.
        4. Automatically sourced ERM rules show rule type as **Automatic**.

e. **Clarification on Descriptions and Naming**
    i. **Tom** sought clarity on the meaning of "manual rule."
    ii. **Summary of Responses:**
        1. "Manual rule" refers to the **rule type**, not the description.
        2. **Teresa** clarified:
            a. Example names: *Call-Out*, *Body Camera Usage*.
            b. Example descriptions: *Unexcused Call-Out*, *Excused Call-Out*.
        3. Dropdowns in the KPI module should align with **ERM categories** for consistency.

f. **Automatic vs Manual Mapping Logic**
    i. Automatic Mapping (From ERM)
        1. Any ERM remark added automatically appears under KPI rules as an "Automatic Rule."
        2. The system checks ERM entries and matches them with configured KPIs.
        3. If a KPI exists for that ERM type, the system applies reward/penalty automatically.
    ii. Manual Mapping
        1. Users create a KPI manually using **Add KPI Rule → Manual**.
        2. Manual rules serve as placeholders.
        3. Points for manual rules are assigned only after the KPI is achieved.
    iii. Request for Clarification
        1. **Tom** repeatedly requested clarity on:
            a. How automatic vs manual classification is assigned.
            b. How ERM remarks map to KPI rules.
        2. **Kuldeep** clarified:
            a. Any rule created inside the KPI module = **manual**.
            b. Any rule originating from ERM = **automatic**.

g. **Conversation Around ERM–KPI Complexity**
    i. **Teresa** raised concerns about:
        1. The large volume of ERM remark types.
        2. Multiple variations of similar remark types (e.g., Call-Out types: excused, unexcused, medical, neutral, last-minute).
        3. The operational overhead of mapping each ERM type individually inside KPI.

ii. **Kuldeep** confirmed:
    1. Currently **every ERM type is available for KPI mapping**.
    2. No checkbox exists in ERM to selectively map remarks to KPIs (all are included by default).

iii. **Potential Improvement Requested**
    1. Teresa requested consideration for:
        a. A higher-level grouping (e.g., Positive / Negative categories).
        b. Ability to assign KPI points at category level rather than individual ERM type level.

h. Use Case Discussion: Account Manager KPIs

i. **Tom** discussed KPI tracking for Account Managers (e.g., acquiring new accounts).

ii. **Teresa** suggested:
    1. Temporary manual KPIs could be used.
    2. For automation:
        a. Need mapping from ERM or system-generated events (e.g., new site assignments).

iii. **Kuldeep** explained:
    1. Automatic detection is possible:
        a. Create an ERM remark type such as *New Account Onboarding*.
        b. The system can track the number of accounts created within a period.
    2. This will allow auto-assigning KPIs based on account manager activity.

i. Demonstration of ERM → KPI Rule Mapping

i. Kuldeep demonstrated:
    1. Creating new ERM remarks (e.g., “positive” remark category).
    2. How newly created ERM remark types appear under KPI rule creation.
    3. Ability to set KPI targets based on remark entries for agents.

j. Discussion on Automatic KPI Tracking

i. Tom’s Concern
    1. Tom questioned the logic of automatic KPI calculation when a new account is created.
    2. Clarified that the system should not require manual ERM entry every time a new account or activity occurs.

ii. Teresa’s Clarification
    1. Currently, automatic tracking works only when:
        a. There is a predefined trigger event.
        b. Examples: employee termination → automatic ERM entry → KPI tracking.
    2. For new account creation:
        a. The system can only track automatically if ERM entries are created through backend triggers.
        b. Otherwise, manual ERM entries are required.

iii. Kuldeep’s Explanation
    1. System creates automatic ERM entries when:

        a. A termination occurs.
        b. A call-out is executed.
        c. A highlight entry is made for activity codes.
    2. Similar logic can be extended for account creation:
        a. A backend trigger can be added for "new site onboarding."
        b. Mapped to the assigned account manager.

k. **Need for Event-Based Interface for KPI/ERM Mapping**
    i. **Current Condition**
        1. Many mappings (e.g., highlight-based KPIs) are manually configured in the backend.
    ii. **Tom's Requirement**
        1. System should provide:
            a. A configurable interface for mapping KPI rules to **events/activities**.
            b. Admin should not need to contact developers for adding or mapping KPI triggers.
    iii. **Kuldeep's Plan**
        1. Prepare an Excel sheet listing all required events for mapping:
            a. Account creation
            b. Account assignment
            c. Dollar amount added (from invoicing)
            d. Activity code triggers (highlight blue/green/yellow)
            e. Attendance (late, punctual)
        2. After listing events, team will design a unified interface:
            a. Admins can map KPI rules to events on their own.
            b. Reduce backend dependency.

l. **Default ERM & KPI Items Needed in System**
    i. **Teresa's Input**
        1. System must ship with a default set of ERM items:
            a. Call-outs
            b. Excused / Unexcused absences
            c. Complaints
            d. Terminations
            e. Attendance-based items
        2. These must be pre-mapped to KPI categories where applicable.

m. **KPI Mappings Required for Account Managers / Sales**
    i. **Tom's Requirement:** Two KPIs must be created (target: next Tuesday):
        1. **Accounts Added KPI**
            a. Measures number of new accounts (new sites) assigned to an Account Manager / Salesperson.
            b. Must be automatically mapped to new account/site creation.
        2. **Revenue KPI**
            a. Monthly dollar target (e.g., $16,500 per month).
            b. Should map directly to invoicing totals for each account manager.
        3. **Kuldeep confirmed:**
            a. Both KPIs can be created as rules.

b. Targets can be assigned at department or individual employee level.
c. Different employees can have different target values (e.g., 3 accounts vs. 5 accounts).

n. **KPI Assignment – Department & Employee Level**
   i. **System already supports:**
      1. Assigning KPI rules to departments.
      2. Assigning KPI rules directly to specific agents via their profile.
   ii. **Example:**
      1. KPI Rule A → 3 accounts/month
      2. KPI Rule B → 5 accounts/month
      3. Assigned individually based on role requirement.

o. **KPI Trigger Frequency Enhancements**
   i. **Current Options**
      1. Daily, Weekly, Monthly, Yearly
   ii. **Requirements Discussed:**
      1. Add additional intervals:
         a. Shift-based
         b. Bi-weekly
         c. Bi-monthly
         d. Quarterly
         e. Semi-annually
         f. Annually
      2. KPI frequency must be **uniform across reporting and analytics**.
   iii. **Notes:**
      1. "Daily" currently means midnight-to-midnight.
      2. "Shift-based" will correctly capture activities happening across shift boundaries (before/after midnight).
      3. Kuldeep confirmed they will update the system accordingly.

p. **KPI Analytics Review & Feedback**
   i. **Overview Presented**
      1. Pankaj demonstrated the KPI Analytics module for the Admin department.
      2. Comparison shown between current date (26th) and previous date (25th).
      3. KPI categories displayed using:
         a. Pie charts
         b. Performance-over-time graphs
         c. KPI achievement breakdown tables
   ii. **Key Issues Identified by Tom**
      1. Pie Charts Have No Meaning Without Totals
         a. Example: “7” shown in a full red circle, same display as “1” in a different chart.
         b. **Fix required:** Show *7 out of 17* or *1 out of total* — must clearly reflect proportion.
      2. Percentage Calculation Issues
         a. Termination % increase: previous = 1, current = 7
            i. Tom flagged incorrect representation.

b. Penalty percentage calculation wrong:
    i. Previous penalties = 0
    ii. Current penalties = -2.1
    iii. System showing **0%** incorrectly.
c. **Fix required:** Correct positive/negative percentage change formulas.

3. **Graph Bugs**
    a. Certain graphs are not loading despite backend data being present.
    b. Some daily filters do not pull earlier period data.
    c. Tom confirmed the backend is working since tables show correct numbers.
    d. **Fix required:** Resolve graph rendering bugs.
4. **Department Performance Over Time**
    a. Some filters show data only for one side (previous/current) due to missing or bugged graph rendering.
    b. **Fix required:** Ensure both periods always load when data exists.
5. **Export (PDF)**
    a. Kuldeep confirmed PDF export will match the layout used in Site Analytics.
    b. **Action:** Clone and implement the same PDF export logic.

iii. Deadline Commitment
1. **The team committed to fixing all KPI-related issues by Tuesday next week.**
2. Tom agreed with the timeline.

4. **PSSP Discussion & Prioritization**
    a. **2.1 Meeting Scheduling**
        i. No meeting on Thanksgiving (Thursday).
        ii. Teresa is open to meeting Friday.
        iii. Jaspreet informed Friday is not possible as the whole team will be unavailable.
        iv. Tom allowed Teresa to meet the team tomorrow(Thursday) for PSSP-only discussion.
5. **Sprint, Priority & Ticket Management**
    a. **Current Status**
        i. Jaspreet updated Tom that:
            1. Sprint sheets for November–December created.
            2. Ticket priorities already applied using Priority 1, 2, 3, 4 hierarchy.
            3. Total 88 tickets currently tracked.
    b. **PSSP Ticket Classification**
        i. Teresa shared:
            1. Issues are already listed.
            2. Change requests not yet assigned priorities.
        ii. Tom's direction:
            1. All PSSP issues must be resolved immediately

a. These go in **Priority 1**.
b. They must be fixed before client escalations or cancellation risks.

2. Change Requests
    a. Split into **minor** and **major**:
        i. **Minor change requests (< 2 hours)** → Can be completed immediately.
        ii. **Major change requests (> 2 hours)** → Put on hold until Tom reviews.
    b. Teresa will approve or escalate if needed.

c. Examples Discussed

i. Minor Changes

1. Add column “Received By”
2. Auto-attach responding officer in calls (1–2 hours approx.)
3. Default dropdown values
4. Lock approved punches (schedule-related)

ii. Major Change Example

1. Send all reports immediately after ALL reports for a time period are accepted
    a. Identified as a *larger development task*
    b. Needs separate review and may require client billing if custom.

d. Billing & Customization Policy

i. Tom clarified:

1. **Issues (system faults)** → Must be fixed immediately at no cost.
2. **Change requests**:
    a. Minor → absorb in sprint if quick.
    b. Major/custom → Client must **pay for customization** OR wait until it naturally comes up in CHS roadmap.