**Minutes of Meeting**

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| **Date and Time** | 20 August 2025<br>09:00 PST | **Meeting type** | Zoom |
| **Organiser** | Mr. Rupesh | **Client** | Citywide |

| **Attendees (Internal)** |
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| • Rupesh<br>• Kuldeep<br>• Jaspreet<br>• Sangita<br>• Vishesh<br>• Akash<br>• Ravinder<br>• Amit<br>• Gurpreet<br>• Ajay |
| **Attendees (Client Side )** |
| • Tom, Teresa, Matt |

| **Agenda** |
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| • **Discussions on the following:**<br>◦ Training & Video Upload Functionality<br>◦ Employee Help & Support Requests<br>◦ Mapping Calls to Forms<br>◦ Scheduler – Color Settings<br>◦ Scheduling Analytics:<br>◦ Role Auto-Switch & Vehicle Alignment<br>◦ Training Module Ticket (#687)<br>◦ Feature Deployment & Release Management<br>◦ QA Environment Setup<br>◦ Next Meeting Preparation |

**The following things are discussed:**

1. **Training & Video Upload Functionality**
    a. **Randy** confirmed the training module is working fine on staging and production.
    b. Video upload issue identified (codec issue with Vector Solution videos) but resolved.
    c. Now able to upload & use training introduction videos smoothly.
    d. Tom confirmed video upload works fine for longer durations (5–10 mins).
2. **Employee Help & Support Requests**
    i. **New Requests:**
    ii. Users can create requests, select sites, choose anonymity option, and add a message.
    iii. Anonymous submissions currently do not allow admin replies.
    b. **Incident Explanation Field:**
        i. **Tom** asked if there's a character limit → Jaspreet clarified there is none.
        ii. Discussion on making input fields expandable/resizable for better user experience.
    c. **Request Lifecycle & Closure**
        i. **Statuses:** Requests can be **Active, Closed, Withdrawn**.
        ii. **Closure Responsibility:**
            1. Officers can only withdraw or provide feedback (Satisfied / Dissatisfied).
            2. Only **Admin** should close requests.
        iii. **Closing Workflow:**
            1. Before closure, the admin should add a **final disposition/report**.
            2. Employees receive a final message with **3 options** → Satisfied / Dissatisfied / Withdraw.
            3. Once chosen → Request is fully closed & locked.
            4. If dissatisfied → A new complaint can be raised, linked to the previous one.
    d. **Handling of Ongoing / Linked Requests**
        i. Reopening old requests repeatedly makes analytics inaccurate.
        ii. Agreement: Instead of reopening, create a **new linked request** with reference to the old one.
        iii. Option: Dropdown for "Is this a new request or ongoing?"
            1. If ongoing → link to previous ticket.
    e. **Client vs Employee Requests**
        i. Currently, all requests (employee + client) appear together.
        ii. Decision: Separate into **Team Member Help & Support** and **Client Help & Support** categories.
    f. **Anonymous Requests Handling**
        i. **Current behavior:** Anonymous request cannot be replied to.
        ii. **Decision:**
            1. Keep it one-way only (like a tip line).
            2. Admin must still record **internal disposition notes** for record

keeping & liability purposes.
3. Anonymous reporters will not receive feedback.

g. **Admin/Internal Notes**
   i. Requirement for **internal-only notes** (not visible to reporting employees).
   ii. Rationale:
      1. For sensitive cases (e.g., harassment, disciplinary actions).
      2. Record investigations & decisions internally without disclosing to the complainant.
   iii. Decision: Add **Admin-only reporting field/section** where multiple notes can be stored.

h. **Notes & Documentation in Incident Reports**
   i. **Jaspreet** suggested that a note be mandatory whenever a report is closed, capturing incident details, steps taken, and resolution.
   ii. **Teresa** clarified:
      1. Notes should not be limited to closure.
      2. Multi-step investigations require documentation at each step (timestamped, logged, shareable with supervisors).
   iii. **Decision:**
      1. Notes must be supported **throughout the lifecycle of an incident/request**, not only at closure.

i. **Internal Investigator Notes vs Final Report**
   i. **Tom** explained two perspectives of forms:
      1. **Officer/complainant side:** Initial submission.
      2. **Investigation side:** Notes taken during investigation (witness interviews, evidence, dispatch logs, etc.).
   ii. Requirement:
      1. Investigators must be able to **create multiple notes**, label them, and keep them **invisible to the employee**.
      2. At closure, only the **final summary report** should be visible to the employee.
      3. The system should also allow investigator-to-employee communication separately from internal notes.
   **iii. Outcome:**
      1. Two categories of documentation:
         a. **Private investigator notes** (not visible to employees).
         b. **Final report/communications** (visible to employees at closure).

j. **Forms Creation & Default Templates**
   i. **Teresa** asked how forms (like Use of Force, Harassment, etc.) will be incorporated.
   ii. **Tom's Direction:**
      1. Teresa will send required forms.
      2. **Ditstek team** to create them as **default options** in the system.
      3. Clients can:
         a. Use default forms.
         b. Or build custom forms if needed.
   **iii. Form Requirements:**
      1. Must capture structured details (date, time, location, type,

people involved, response, confirmation, etc.).
        2. Field names must be unique (template names cannot be duplicated).

3. **Mapping Calls to Forms**
    a. **Jaspreet** raised concern: Calls not mapped to forms may keep accumulating in dropdowns.
    b. **Teresa & Tom** clarified:
        i. Every call must eventually map to a **report or form**.
        ii. Once mapped, the call should **disappear from the dropdown**.
        iii. If calls remain, it means officers are not closing them properly.
    c. **Decision:** Only **open/unmapped calls** will appear. Closed/mapped calls will no longer show.
    d. **Linking Multiple Forms in a Single Workflow**
        i. **Tom's Requirement:**
            1. From within an **incident report**, officers should be able to directly generate related forms (trespass notice, FI, parking citation, etc.).
            2. Avoid redundant navigation or double data entry.
            3. Reports should be interconnected (incident ↔ parking citation ↔ trespass, etc.).
        ii. **Jaspreet's Proposal:**
            1. Provide checkboxes within the incident report creation.
            2. Selecting multiple (e.g., Incident + Trespass) will automatically open relevant forms sequentially.
            3. All forms will be **linked and viewable together** with attachments.
        iii. **Tom:** Agreed with this approach.
    e. **Report Page Enhancement**
        i. **Discussion:**
            1. Tom suggested that when creating a new report, users should be able to do everything directly from the **report page**, including selecting multiple forms.
            2. This avoids navigation between pages, making the process simpler and "dummy-proof."
            3. Jaspreet confirmed this approach aligns with their plan.
        ii. **Decision:**
            1. Enhancement to be implemented: **New Report creation within the same page**, with ability to add multiple forms.

4. **Scheduler – Color Settings**
    a. **Background:**
        i. Current default color codes:
            1. **Open Shift → Yellow**
            2. **Scheduled → Blue**
            3. **Completed → Green**
        ii. Client request (PSSP): Ability to **customize colors** (both background and text) for different shift statuses.
    b. **Proposed Solution:**
        i. Add a **Shift Color Rules tab** under **HR Configuration → Company Settings**.

ii. Allow configuration of both **background color** and **text color** for shift cards (Scheduled, Open, Missed, Overtime, Double Time, Completed).
iii. Example: Scheduled shift card → Red background + Black text (customizable by company).

c. **Clarification Points Raised:**
   i. Teresa mentioned client emails might have referred more to **border colors** (for sites, beats, days) rather than shift card background colors.
   ii. Jaspreet reviewed the client's request:
      1. Second point in the ticket – "Ability to change shift colors or border lines between sites, beats, days, as the schedule becomes visually overwhelming when full."
   iii. The team acknowledged possible confusion: **borders vs. shift card colors.**

d. **Action Items:**
   i. **Check client communication** again to clarify if they meant:
      1. Shift card colors (status-based), OR
      2. Borderline enhancements for schedule readability.
   ii. As an interim improvement, Tom suggested: **Darken border lines** for better block separation.
   iii. Maintain flexibility: Provide options for companies to set their own shift color combinations regardless.

5. **Scheduling Analytics:**
   a. **Clarification on Terminology for Hours**
      i. **Current Issue:** The term *"Staffing Hours Needed"* is confusing.
      ii. **Discussion & Alignment:**
         1. Rename to **Operating Hours / Total Operating Hours**.
         2. Distinguish between different types of hours to avoid misinterpretation.
   b. **Finalized Definitions & Categorization of Hours**
      **i.** **Contracted Hours (Projected Hours):**
         1. Hours required as per **client agreement/site notes**.
         2. Represents *"what should have happened"* (baseline for comparison).
      **ii.** **Operating Hours (Actual Scheduled Hours):**
         1. All hours scheduled on the system (across all colors, except blank/white blocks).
         2. Reflects "what actually happened."
      **iii.** **Staffed Hours (Worked Hours):**
         1. Hours covered by actual staff members.
         2. Subset of Operating Hours, but specifically tied to assigned officers.
      **iv.** **Open Hours (Yellow):**
         1. Hours available but not yet staffed.
         2. May indicate coverage gaps.
      **v.** **Unscheduled Hours (Gray with timestamp):**
         1. Required hours where no shift was scheduled.
         2. Represents unmet contracted coverage.

vi. **Overtime Hours (Red):**
    1. All scheduled overtime shifts.

vii. **Double Time Hours (Purple):**
    1. All scheduled double-time shifts.

c. **Handling Over-Scheduling / Extra Coverage**
   i. **Challenge Raised by Jaspreet:**
      1. How to identify if a site is *over-scheduled* or *under-scheduled*.
   ii. **Tom's Clarification:**
      1. Over-scheduling should be allowed in emergencies (e.g., adding extra coverage beyond contracted hours).
      2. System should:
         a. **Prompt user**: "Are you creating extra coverage outside contracted hours?"
         b. If yes, allow it and mark the shift as **Extra Coverage**.
         c. On invoices, extra coverage should appear as a **separate line item**, ensuring transparency with clients.

d. **Analytics Dashboard Enhancements**
   i. Add a **new metric box for Contracted Hours (Projected Hours)**.
   ii. Display clear breakdown for each site:
      1. Contracted Hours (What should happen)
      2. Operating Hours (What actually happened)
      3. Staffed Hours (Hours covered by staff)
      4. Open Hours (Yellow)
      5. Unscheduled Hours (Gray with timestamp)
      6. Overtime (Red)
      7. Double Time (Purple)
   iii. Filtering at the **site level** must work correctly (noted API already implemented, needs verification).

e. **Key Takeaways**
   i. **Terminology standardized** → reduces confusion in reporting.
   ii. **Contracted vs Operating Hours** distinction critical for measuring under/over staffing.
   iii. **System enhancement required** → new Contracted Hours box, emergency coverage handling, proper site filters.

f. **Scheduling Filters**
   i. **Discussion:**
      1. Current filters only allow viewing *Accepted* and *Rejected* shifts.
      2. Proposal to add more status-based filters: **Missed, Open, Overtime (OT), Double-time (DT), Completed, Pending**.
   ii. **Resolution:**
      1. Two separate filters will be implemented:
         a. **Acceptance Filter:** Accepted / Rejected.
         b. **Status Filter:** Scheduled, Pending, Open, Missed, Overtime, Double-time.
      2. Avoid mixing both filters as it could override results.
      3. **UI Adjustment:** Filter boxes should be resized to fit only the

            status text (per Teresa's request).
    iii. **Action:** Jaspreet & Kuldeep to implement separate filters and adjust UI (linked to Trello card **#952**).

g. **Analytics – Published vs Actual Hours**
    i. **Discussion:**
        1. Clarification needed on how overtime and hours update in analytics view.
        2. Teresa asked whether displayed data shows projected or actual.
    ii. **Tom's Clarification:**
        1. **Published Hours** = baseline (scheduled hours).
        2. As shifts close: system updates with **Actual Hours worked**.
        3. Overtime updates dynamically:
            a. Example: 10 OT hours published, +2 actual OT worked → dashboard shows 12.
            b. If later adjustments reduce published OT, totals reconcile accordingly.
    iii. **Resolution:**
        1. Analytics to be understood as: **Published Hours + Actual Hours completed (reconciled in timesheet)**.
        2. This ensures clarity when explaining to clients.

h. **UI Text Update**
    i. **Request (Teresa):** Change label "Site" in analytics to **Stationary and Mobile**, to avoid confusion.
    ii. **Resolution:** Kuldeep to update text accordingly.

6. **Role Auto-Switch & Vehicle Alignment**
    a. **Observation (Jaspreet & Teresa):**
        i. Role switching to scheduled role works (e.g., Patrol → Standing).
        ii. Issue: Vehicle inspection tab still visible even when role should not allow it.
    b. **Problem:**
        i. No clear way to confirm if a **vehicle is aligned with a site**.
        ii. Currently, fleet management shows all vehicles, but site notes do not indicate site-vehicle assignments.
    c. **Resolution/Next Steps:**
        i. Add ability to **view assigned vehicles at both site-level and vehicle-level**.
        ii. Re-check role-switch functionality for glitches (especially with vehicle permissions).
        iii. Verify whether vehicles are properly assigned to specific sites (e.g., East Lockwood).

7. **Training Module Ticket (#687)**
    a. **Discussion:** Ticket regarding role permissions for instructors in training.
    b. **Resolution:**
        i. Already resolved under role-based access (My Courses = Student).
        ii. No further action required.
    c. **Action:** Archive Trello ticket **#687**.

8. **Feature Deployment & Release Management**
    a. **Teresa's Concern:**

i. Observed that updates are first being deployed to **Citywide** only.
ii. Requested clarity on what is deployed on **Citywide** vs. what is available for **all clients**.
iii. Noted an issue where she shared updates with her client (including a "training module") that was **not available** to them.
iv. Requested a **clear log/report** that differentiates between features on staging, Citywide production, and other instances.
v. Asked if release timelines could be **adjusted (moved earlier)** when the build is stable instead of waiting for the next scheduled update.

**b. Kuldeep's Response:**
   i. Confirmed that a list will be shared showing:
      1. Features/modules live on Citywide.
      2. Features pending deployment on other client instances.
   ii. A **Trello board/ticket** will be maintained for visibility of:
      1. Features ready for deployment.
      2. Pending deployments for other instances.
   iii. Explained that deployment is done **to Citywide first**, then rolled out to others once fully tested/approved.

**c. Tom's Input:**
   i. Emphasized the need for a **proper log sheet** showing:
      1. Feature status (Staging → Citywide Prod → All Instances).
      2. Pending items.
   ii. Deployment is not considered "done" until it is available across all instances.
   iii. Requested that after a feature is live on Citywide, a **2-week reminder** should be flagged to Teresa & Tom for decision-making on rollout to all clients.

**d. Kuldeep's Confirmation:**
   i. Agreed and mentioned that a **reminder ticket** is already being created (within 7–15 days post-launch on Citywide).

**e. Jaspreet's Clarification:**
   i. Differentiated between **new/standalone modules** (follow the above Citywide-first flow) and **enhancements to existing modules** (these are pushed directly to all clients).

**f. Teresa's Understanding:**
   i. Confirmed: **Enhancements → All clients**, **New Modules → Citywide first → Then other clients**.

**g. Analytics Module Update**
   i. **Tom's Query:** Asked about the status of **Analytics**.
   ii. **Kuldeep's Update:**
      1. Development was delayed due to priority work on **PSSP**.
      2. Work on analytics has now resumed this week.

**9. QA Environment Setup**

a. **Kuldeep's Request:**
   i. Proposed creating a **dedicated QA/pre-production environment** for regression testing to ensure more stable builds before release.

**b. Teresa's Response:**
   i. Approved reuse of **unused/deactivated instances** (e.g., Elevated Protection, training instances).

c. **Agreed Action:**
    i. Kuldeep to share a list of training instances.
    ii. One instance to be retained as QA; remaining training instances to be deactivated/removed.

10. **Next Meeting Preparation:**
    a. Jaspreet asked Tom if tomorrow's meeting should focus on **fleet management with Aryan** or **priority planning**.
    b. Tom confirmed priorities discussion should also be included.