Minutes of Meeting

Date and Time	19 November 2025 09:00 PST	**Meeting type**	Zoom
Organiser	Mr. Rupesh	**Client**	Citywide

Attendees (Internal)
• Rupesh • Kuldeep • Jaspreet • Vishesh • Ajay • Pankaj • Akash • Kapil • Rahul • Anshul
Attendees (Client Side)
• Teresa, Matt

Agenda
• **Discussions on the following:** ○ KPI Module demo ○ Admin Dispatch Site Updates ○ User Tracking Enhancements (Web + Mobile) ○ Call Module Updates ○ Meeting Scheduling ○ Upcoming Hotfix & Build Plan

The following things are discussed:

1. **KPI Module demo:**
    a. **KPI Module Features Overview :** Pankaj demonstrated the following core components:
        i. KPI Dashboard
        ii. Analytics
        iii. Settings
        iv. KPI Rule Grading
        v. Target Assignment
        vi. KPI Enabling/Disabling
        vii. Score Calculation
        viii. PDF / CSV Export Functionality
    b. **KPI Settings**
        i. **Department-wise Rule Creation**
            1. Each department has its own configurable rule types.
            2. Example rule: "Negative Callout – 5 times per month = Penalty -40".
            3. Rules can be:
                a. **System-defined (ERM auto-generated)**
                b. **Manually created** (Manual Rule 1, 2, 3…).
        ii. **Manual Rule Creation Flow**
            1. Added via **KPI Rule Grading** section.
            2. Once created, rules appear in the department's rule list.
            3. Demonstrated creation of "Manual Rule 3".
        iii. **Target Reflection in Employee Profile**
            1. Example employee "Archie Author" showed:
                a. 8 departmental rules
                b. +1 employee-specific rule
            2. Total visible rules = 9 (correct behavior).
    c. **KPI Rule Grading (Performance Ranges)**
        i. Grades can be created with:
            1. Score range (e.g., 0–59 = Termination)
            2. Grade label
            3. Color coding
            4. Description
        ii. Grade colors will reflect in employee profile analytics.
    d. **KPI Enable/Disable Functionality**
        i. New checkbox added to enable/disable any KPI rule.
        ii. Disabled rules:
            1. Do **not** appear in employee's target list
            2. Cannot be rewarded/penalized
            3. Auto-reduce the total count of rules
        iii. Demonstrated disabling "Negative Callout" rule → count reduced from 9 to 8.
    e. **KPI Score Calculations**
        i. Score logic includes:
            1. Rule hits
            2. Reward

        3. Penalty
        4. Net performance score
    ii. **Correction Identified:**
        1. Teresa instructed that **Net Score = Rewards – Penalties** (NOT Rewards + Penalties).
        2. Pankaj agreed to update this in calculations.

f. **KPI Analytics Demonstration**
    i. **Previous vs Current Period Comparison**
        1. Displayed:
            a. Previous period vs Current period
            b. Performance grid distribution (e.g., 100 club, suspension, termination)
            c. Color-coded KPI grades
            d. Percentage increase/decrease in employee count for each grade
        2. **Example:**
            a. Suspension: Previous = 1, Current = 0 → 100% decrease.
    ii. **Monthly Comparison**
        1. Current month (November) compared with previous month (October).
        2. Demonstrated:
            a. Reward/Penalty averages
            b. Net performance point change
            c. Percentage shifts
        3. **Example:**
            a. Previous avg rewards: 31 → Current: 28
            b. Previous penalties: 3 → Current: 4
            c. Net points dropped by -5.88%.
    iii. **KPI Achievement Breakdown**
        1. Shows how many employees achieved each KPI rule.
        2. Example:
            a. "Positive Outstanding Performance"
                i. Assigned to 3 users
                ii. Achieved by 2 users in October
                iii. Achieved by 0 users in November
        3. Two UI formats discussed:
            a. **Circular visual indicators**
            b. **Tabular format**
        4. **Client feedback:**
            a. Teresa prefers **circular visual UI**, even if rule count grows.
            b. Table view is acceptable as a secondary option.

g. **Client Feedback & UI Corrections**
    i. **Preferred Display Format**
        1. Use the department **filter view first**, then "All" view.
        2. When demonstrating to Tom, always:
            a. Show **Department-wise view first**
            b. Then full "All Departments" view.

ii. **UI Consistency**
    1. Current (left) and Previous (right) must be consistent across all screens.
    2. Developer to update tiles that have reversed order.

iii. **Calculations**
    1. Net Score should use **Rewards – Penalties**.

h. **Discussion on KPI Overview & UI Simplification**

i. **Removal of Excess Information**
    1. Client highlighted that KPI screens currently show **too much detailed information**, similar to listing every rule in ERM.
    2. Request made to **collapse/remove unnecessary sections** to avoid overwhelming officers.

ii. **Key Focus Areas for KPI Status**
    1. KPI Status should clearly display:
        a. **Current Score**
        b. **Current Category (100 Club, Suspension, Termination, etc.)**

i. **Terminology Changes & Better Labeling**

i. **"Target Assigned" Needs Renaming**
    1. Client clarified:
        a. Not all rules are "targets".
        b. Negative KPIs (e.g., late check-in, complaints) should not be labeled as targets.
        c. Targets should relate to expected performance or positive KPIs.

ii. **Suggested Renaming**
    1. Rename "Target Assigned" to something more generic like:
        a. **Points Assigned**
        b. **KPIs Assigned**
        c. **Total KPIs Being Graded On**
    2. The screen should display **how many KPIs employees are graded on**, not "targets".

j. **What Should Be Visible to Employees**

i. **Only Relevant Performance Metrics Should Show**
    1. Client clarified:
        a. Employees should only see:
            i. **Current Score**
            ii. **Current Category**
        b. Daily KPI view should show **previous day's closed KPIs**, not same-day running KPIs.
            i. This avoids confusion (e.g., showing zero points early morning leading to "termination" status).

ii. **Showing Daily Checklist (Optional Future Improvement)**
    1. System can later introduce department-wise daily checklists such as:
        a. Arrive on time
        b. Conduct patrol
        c. Complete daily highlight
        d. Use body camera

        2. These would represent **base points** for the day — not deductions.

k. **KPI Breakdown Table**
    i. A structured **table view** is required to show:
        1. KPIs achieved
        2. KPIs assigned
        3. Points received

l. **Multi-Role Officer KPI Behavior**
    i. **Clarification Requested by Client**
        1. Client asked:
            a. If an officer has **multiple service types** (patrol + standing), how will KPIs behave?
            b. Will they see KPIs for both roles or only the current active role?
    ii. **System Behavior (As Explained by Kuldeep)**
        1. KPI rules are **department-based**, not role-based.
        2. Example:
            a. If a user is in the **Admin department**, they will always see KPIs for Admin, regardless of whether they log in as patrol, standing, or field agent.
        3. This needs to be clearly explained to users.

m. **Feedback Acceptance & UI Rework**
    i. Client agreed to UI rework and simplification.
    ii. Developer (Pankaj) confirmed understanding and will modify the design accordingly.

n. **Deployment & Release Timeline Discussion**
    i. **QA Status**
        1. The current build is on a staging **server**.
        2. Pending feedback includes:
            a. Dark mode issues
            b. Recent KPI corrections from this call
        3. QA requires **1–2 days** to validate the point system and calculations.
    ii. **Production Deployment Feasibility**
        1. Client requested KPI module on production before upcoming demo with **Brandon's team** next week.
        2. Kuldeep clarified:
            a. KPI module requires **filtered and prepared data** to be meaningful.
            b. Staging is better for KPI demo due to existing sample data.
            c. Analytics is already on production and can be demonstrated.
    iii. **Final Position**
        1. No commitment on pushing KPI to production due to pending QA.
        2. Development team will try to improve readiness in the next **1–2 days** and update client.

o. **Upcoming External Demo**

i. Tom informed the client that:
   1. Next week there will be a demo with **Brandon and his training corporation team**.
   2. Their goal is to evaluate CommandHub for recommendation to other clients.
   3. **Analytics and KPI modules** will be the key focus areas.

ii. Client emphasized:
   1. Having KPI visible with meaningful data (staging acceptable if better).

2. **Admin Dispatch Site Updates**
   a. **New Service Type**
      i. A new service type **"Admin Dispatch Site"** has been added.
      ii. Sidebar menu and functionalities will now render based on the selected service type.
   b. **Admin Coverage**
      i. Admin coverage will show:
         1. Coverage Name
         2. Service dropdown (services configured under company settings)
      ii. **Coverage End Date** and **Rate (Base Price / Holiday Rates)** are **not required** for admin dispatch services.
   c. **Scheduler Enhancements**
      i. A new scheduler option added for:
         1. Stationary
         2. Mobile
         3. **Admin Dispatch Site**
      ii. Any agent can currently be selected for scheduling under Admin Dispatch.
      iii. **Restrictions to ensure only Admin/Dispatch role users are assignable will be added later.**
   d. **Billing & Payroll Settings**
      i. **Billing report option will be hidden** for Admin Dispatch since no rate structure exists.
      ii. Only:
         1. **Payroll Report**
         2. **Shift-based Reports**

         will remain accessible.
   e. **Inclusion in Global Reports**
      i. Admin dispatch shifts WILL appear in the **main payroll report** when no department filter is applied.

3. **User Tracking Enhancements (Web + Mobile)**
   a. **Tracking Activation Logic**
      i. Tracking will:
         1. Start automatically when the shift starts.
         2. Stop automatically when the shift ends.
      ii. This will apply to both **Web** and **Mobile**.
   b. **General Tracking Display Enhancements**
      i. When viewing user tracks:
         1. Green → Shift Start
         2. Red → Shift End

3. Counters → Activities performed
ii. **Idle spots** can be optionally toggled on/off to avoid clutter.
iii. Clicking any point will show:
1. Activity Type
2. Agent Name
3. Timestamp

c. **"Play Route Activity" Feature**
i. A play button will replay the agent's movement with markers.
ii. A **recording option** will allow users to:
1. Record the route playback
2. Download & share the video

d. **Speed Control Requirement**
i. CommandHub requested **speed playback controls** such as:
1. 1x
2. 2x
3. Fast-forward
ii. The team will implement a speed control option during route replay.

e. **Idle Status Logic – Distance Threshold Adjustment**
i. Current Behaviour
1. Idle activity triggers when movement exceeds **~200 meters (approx. 600 feet)**.
ii. Issues Identified
1. The current distance is too large for practical analysis.
2. For patrol officers 200 meters covers a large area (roughly a football field).
iii. Change Request
1. Idle detection threshold to be reduced to:
a. **100–150 feet**
2. Rupesh to verify current configuration with Kuldeep.
3. Jaspreet to note down this requirement.

f. **Map Scaling, Visibility & Real-Time Playback Improvements**
i. Current Concern
1. For large patrol routes (e.g., 50-mile routes across San Diego), the existing map area is too small.
ii. Requested Enhancements
1. Ability to view FULL patrol routes on a larger map.
2. Options discussed:
a. **Collapse sections** to maximize map display.
b. Map should **auto-move with the agent** during playback.
c. Zoom-out capability for **city-level visibility**.
3. The Kuldeep will generate **real patrol route mock data** to test display behavior.
4. Team will attempt first implementation approach:
a. Keep the map centered and zoom-adjusted as the vehicle moves.

4. Call Module Updates

a. **Primary & Backup Unit Functionality**
i. System now supports:
1. Selecting a **Primary Unit** (only one can be primary).

        2. Selecting **multiple Backup Units**.
        3. To change the primary unit, the current primary must first be removed.
    ii. Activity code selection updated:
        1. Selecting an activity code disables the option in the list.
        2. Multiple secondary activity codes can be selected.

b. **Call View After Creation**
    i. In the open call view:
        1. Users can see **who is primary** and **who are the backup units**.
        2. All activity codes are visible: **main activity code + secondary activity codes**.
    ii. CommandHub confirmed:
        1. This structure is correct and acceptable.

c. **Officer View & Access Rules**
    i. **Viewing Activity Codes**
        1. Officers **do not need to see secondary activity codes** during report creation.
        2. Officers **should see the primary activity code**.
        3. When viewing call details:
            a. Officers **should see all activity codes**, including secondary.
    ii. **Viewing Call Description**
        1. Call description auto-loads based on call selection.
        2. Officers **do not need to see secondary codes** within the report creation section.

d. **Access to Calls Assigned Accidentally**
    i. **Officers Should Always See Calls Assigned to Them**
        1. Even if:
            a. The officer is **not assigned to that site** in their employee profile, or
            b. The officer is **on a different shift**, or
            c. The officer has **no access to the site**
                i. —they still **must be able to see the call details** if it is assigned to them.
            d. **Reason:** So the officer can contact dispatch and notify them the call was assigned incorrectly.
    ii. **Viewing Site Notes / Previous Reports**
        1. Officers **must NOT** be able to:
            a. View site notes
            b. View previous reports
                i. if they do not have access to the site.
            c. They should only be able to see:
                i. The call,
                ii. Activity codes,
                iii. Assigned units,
                iv. Call description.

e. **Handling Blacklisted Sites**
    i. **Assigning a Call to a Blacklisted Officer**
        1. If an officer is blacklisted from a site but receives a call:

a. It is acceptable for them to **see the call**.

2. Reasoning from CommandHub:
    a. Blacklisting means they should not be assigned to work there.
    b. If they accidentally receive a call, they should still be able to:
        i. View the call,
        ii. Identify it is incorrect,
        iii. Contact dispatch.

f. Additional Discussion Points

i. Historical Clarification

1. Previous restrictions (from old discussions) about officers not seeing calls for sites they don't have access to are no longer applicable.
2. That was part of an old "designated reporting" workaround that is no longer in use.

5. Meeting Scheduling

a. Teresa will **not be available the following morning** due to a court appointment.
b. The next discussion (related to Trello tickets and priority items) will be **moved to Friday**.

6. Upcoming Hotfix & Build Plan

a. Team will push:
    i. 1–2 hotfixes (e.g., **break option for past scheduled shifts**).
    ii. A small build related to **analytics**.
b. The team will:
    i. Plan the build **tomorrow**.
    ii. **Ping Teresa** once the build process starts.