Minutes of Meeting

Date and Time	01 April 2025 09:00 PST	**Meeting type**	Zoom
Organiser	Ms. Shruti	**Client**	Citywide

Attendees (Internal)
• Shruti • Kuldeep • Jaspreet • Gurpreet • Sangita • Vishesh • Akash
Attendees (Client Side)
• Tom, Teresa, Matt, Randy

Agenda
• **Discussions on the following:** ○ Build Update and issue on production ○ PDF Report(#606) ○ Login Page Message ○ Employee schedule Notifications ○ Shift Assignment Rules & Overtime Considerations ○ Filtering Available Employees ○ Access Control for Scheduling ○ System Updates & Improvements ○ Scheduler Access Levels ○ Break Access on Scheduler ○ Reports and Permissions ○ Analytics and Company Settings ○ Invoicing and Reporting ○ Support Ticket System ○ Client Management and Conversion ○ Partnership with Coastal Payroll ○ Prioritization and Sprint Planning

Summary

The following things were discussed in the demo:

1) **Build Update and issue on production:**
   a) **Teressa approval Required:**
      i) No updates on production until approved by Teresa, even if there is a deadline set for any specific task.
      ii) Any new module build updated into the system should be pushed to the citywide production instance first then should be moved to other instances.
   b) **Update before the build:**
      i) Once approval is given by Teresa, there will be prior approval taken from Teresa's End to update the build.
   c) **Build on weekends:**
      i) On Saturdays and Sundays there will be no demo planned with the commandhubs' future prospects, so the dev team will plan the build on weekends.
   d) **Sprint set up:**
      i) There will be well planned priorities that need to be set based on business level needs.
      ii) Jaspreet will be coordinated with Teresa to get an approval of what needs to be delivered based on priorities.
      iii) The sprint needs to be set up for two weeks.
      iv) Instance set up will be the part which will be handled quickly.
   e) **Avoid builds on specific dates:**
      i) The builds should not be updated on 1st of the month and 30th or 31st of the month
   f) **Configuration settings:** There should be configuration settings for every dropdown in the system which is coming from the backend which will be separate for every instance.
2) **PDF Report(#606):** In the PDF report it was requested to remove the full column if there is no data instead of 'N/A', but as it will not look good so there will be no 'N/A' instead of that there will be only Label.
3) **Login Page Message:** For now instead of 'CWPS', 'Employer's' computer systems will be used.
   a) **Client Management:**
      i) A platform is needed for managing clients effectively, tracking which modules they use, and monitoring their usage and employee numbers.
   b) **CommandHub Admin Panel:**
      i) Work is ongoing to finalize the design for the CommandHub admin panel, which will allow the CommandHub owner to manage clients and associated data.
   c) **Conversion to Node:**
      i) The conversion to Node is still in progress. A dedicated resource has been allocated to avoid impacting current workflows.
4) **Employee schedule Notifications:**
   a) **Employee Schedule Confirmation & Acknowledgement**
      i) Action: Employees will receive a notification for their schedule. Once a schedule is confirmed, the employee acknowledges it, but

rejection is not allowed.

   ii) Notification Method: Flash/Push notifications for mobile and simple notifications for web that redirect to the "My Schedule" section.
   iii) Additional Requirement: Email notification to confirm schedule updates, redirecting employees to log in and confirm their schedule.

b) **Open Shift Assignment Process**
   i) Action: Open shifts need to be sent to specific employees, not to everyone.
   ii) Functionality: The admin should be able to select the specific employees for whom the open shift is relevant (for example, only patrol or only field employees for certain types of shifts).
   iii) Assignment Flow: Once an open shift is sent, employees can either accept or leave it. However, employees cannot reject shifts, only leave them unaccepted.
   iv) First-Come, First-Serve: The system will assign the shift to the first employee who accepts it.
   v) Tracking: A double checkmark or visual indicator will confirm that the shift has been acknowledged by the employee.

5) **Shift Assignment Rules & Overtime Considerations**
   a) Action: Employees who accept shifts should be scheduled for only one shift per open shift request. There should not be multiple employees assigned to the same shift.
   b) Overtime Handling: The system should take into account overtime or double overtime. If an employee accepts a shift that results in overtime, a notification should alert the scheduler to ensure proper management.
   c) Scheduler's Role: The scheduler will have the final say on who is assigned to the shift based on availability and overtime considerations.
   d) Overtime Alert: If an employee causes overtime by accepting a shift, the scheduler will be notified and will decide whether to replace the employee with someone who doesn't cause overtime.

6) **Filtering Available Employees:**
   a) Action: There will be a need for a filter to identify employees who are eligible for shifts without causing overtime or exceeding their work hours.
   b) Functionality: The system should allow filtering of employees by their availability and overtime status. Only employees who are eligible (not causing overtime) will be sent shift requests.
   c) Priority: For open shift requests, the scheduler can send shifts to employees who are eligible based on these filters. If multiple employees meet the criteria, the first to accept gets the shift.
   d) Manual Override: If an employee who causes overtime accepts a shift, the scheduler can manually replace them with someone who does not cause overtime if needed.

7) **Access Control for Scheduling:**
   a) Action: Scheduler access control needs to be clarified. Some schedulers may have access to multiple locations (e.g., sites or patrol), while others might be restricted to specific areas.
   b) Functionality: Schedulers will be able to manage shifts based on their access level, either for specific sites or roles. This access control should help ensure that shifts are assigned appropriately.

8) **System Updates & Improvements:**
    a) Priority: Adding the ability to filter and manage overtime qualifications for employees should be made a priority in system updates.
    b) Action: Scheduler must be able to view and select employees based on their overtime status and available hours.
    c) Next Steps: Further discussion on implementing these updates to improve the scheduling process and avoid confusion regarding overtime management.
9) **Scheduler Access Levels:** There was discussion about scheduling permissions and whether individuals can edit schedules. Tom suggests limiting access to specific departments or sites to avoid multiple people altering schedules.
10) **Break Access on Scheduler:** Teresa was unsure about the purpose of a "break" option in the scheduling system. Kuldeep clarified that it may be for allowing breaks during shifts. Which needs to get checked
11) **Reports and Permissions:** Teresa highlighted the need for specific access levels to reports, such as scheduling reports, payroll reports, and analytics. This ensures dispatchers can't access sensitive information like billing or payroll reports.
12) **Analytics and Company Settings:** There was a debate about where to place the analytics tab in the system. Tom and Teresa favored having it easily accessible on the sidebar, similar to training and applicant tracking. Randy suggested placing analytics under the Operations Hub.
13) **System and Data Accuracy:** Tom provided feedback on the analytics, pointing out that the data displayed was inaccurate. He stressed the importance of ensuring the graphs and data reflect real information. Kuldeep acknowledged these issues and mentioned that the graphs would be updated once the real data was available.
14) **Invoicing and Reporting:** Kuldeep confirmed the automatic invoicing feature was set up, but it currently lacks QuickBooks integration. Tom requested that invoices be checked for discrepancies before being sent and that analytics be implemented for invoice tracking (e.g., open invoices, paid, unpaid).
15) **Support Ticket System:** Tom requested a direct integration for employees to open support tickets via Slack rather than just emailing a generic support address. There was a discussion about adding a support system for clients. The idea was to integrate a system where clients can contact the support team via Slack or a similar communication tool. The need was emphasized for a way to distinguish between customer support and IT support, particularly for system failures or bugs. It was mentioned that this would be part of a larger update and that work was already being done on integrating support through Slack messaging.
16) **Client Management and Conversion:** The admin panel would allow the management of clients, including their modules, usage, and employee data, but this would be separate from the app itself. It was confirmed that this work was part of the ongoing conversion update, and the status of the update was discussed.
17) **Partnership with Coastal Payroll:** A potential partnership with Coastal Payroll was discussed, focusing on integrating their systems via an API. The initial step suggested was email communication to gather requirements before scheduling a call to dive deeper into the integration details. The next step is to initiate email communication to introduce the teams, clarify the API requirements, and plan the next steps.
18) **Prioritization and Sprint Planning:** The need to prioritize tasks and finalize the sprint for the upcoming work was mentioned.It was confirmed that the priority

tasks would be finalized in the next meeting, with specific focus on auto-invoicing and analytics.The first priority would be confirmed soon, and other important tasks were also highlighted.