Minutes of Meeting

Date and Time	25 June 2025 09:00 PST	Meeting type	Zoom
Organiser	Mr. Rupesh	**Client**	Citywide

Attendees (Internal)
- Rupesh   - Kuldeep   - Jaspreet   - Jatin   - Sangita   - Vishesh
Attendees (Client Side)
Tom, Teresa, Randy, Matt

Agenda
Discussions on the following: - Supervisor Role & Workflow Implementation   - Employee Login Credentials & Password Setup   - Mobile Officer / Patrol Officer Permissions Separation   - Project Timelines and Prioritization   - Clarification on OPS Metrics

The following things are discussed:

1. **Supervisor Role & Workflow Implementation**
   a. **Discussion:**
      i. Teresa proposed a permission model for supervisors linked to employees, similar to how sites are assigned.
      ii. Supervisors should have visibility over specific employees without full admin access.
      iii. The notification system should route time-off requests and support tickets to designated supervisors.
      iv. A tiered supervisor hierarchy was also discussed (e.g., Rudy reports to another supervisor).
   b. **Action Item:**

   i. Teresa to draft a detailed workflow plan.

   ii. The dev team may create an initial document for validation.

2. **Employee Login Credentials & Password Setup**

  a. **Discussion:**

   i. Teresa requested the ability to send usernames/passwords when adding employees.

   ii. Preference for system-generated one-time passwords.

   iii. The dev team clarified:

    1. A password setup link will be sent by default unless a manual password is set.

    2. Forgot password functionality is already available.

    3. Onboarding flow: an invite link can be triggered from an employee profile.

  b. **Action Items:**

   i. The dev team will implement a checkbox option ("Send Email Invite to Set Password") in the onboarding process.

3. ***Mobile Officer / Patrol Officer Permissions Separation***

  a. **Discussion:**

   i. The current system links "Vehicle Inspection" permission to patrol officers.

   ii. Teresa and Tom expressed the need for separate permissions for:

    1. Vehicle Inspection

    2. Patrol Officer (without mandatory inspection)

   iii. **Real-world example:** HOA sites with no vehicles should not prompt inspections.

   iv. **Suggestion:** patrol access should not be determined by vehicle inspection.

  b. **Proposed Solutions:**

   i. Separate Mobile Officer or Patrol Officer role with full patrol access.

   ii. Vehicle Inspection permission to be **optional and separate**.

   iii. Patrol officer should be able to operate across multiple sites without being tied to a car.

  c. **Clarifications:**

   i. If both Vehicle Inspection and Mobile Officer permissions exist:

    1. **Mobile Officer** access takes precedence.

    2. Vehicle inspection is required only if the permission is explicitly granted.

  d. **Action Items:**

   i. The dev team to implement separate roles:

    1. Mobile Officer

    2. Vehicle Inspection

   ii. Update permission model to allow flexible combinations.

   iii. Avoid assigning "Vehicle Inspection" permission to users where not applicable.

4. **Project Timelines and Prioritization**

  a. Tom raised concerns about project timelines and lack of updates.

     b. Rupesh shared that Nidhi will send the draft report within 30 minutes and proposed a follow-up call with all stakeholders for tomorrow.

     c. Tom agreed to the call but expressed frustration about recurring delays.

5. **Clarification on OPS Metrics:**
   a. **AOT (Authorized Overtime):**
      i. Defined as billable overtime approved by the client.
      ii. A new service label, e.g., *Extra Coverage Overtime*, will be created in the system for clarity and mapping.
   b. **DP (Dark Post):**
      i. Refers to completely unscheduled but required shifts (gray blocks).
      ii. These are not billed to the client and should be tracked to assess loss in revenue.
   c. **AC (Alternative Coverage):**
      i. Refers to shifts marked "open" (yellow) but not covered by standing guards.
      ii. These are billed to clients due to being covered by other services like patrol.
   d. Differentiation:
      i. **DP** affects work hours (loss in revenue).
      ii. **AC** reduces cost but still generates revenue. For every 1 hour of AC, deduct 0.5 hour from overtime.

   e. **Data Source and Calculation Clarifications:**
      i. **Standing Hours:**
         1. Pulled from timesheets (actual check-in/check-out).
         2. Includes all hours worked (regular, OT, DOT).
         3. Should exclude DP (gray) and unfilled open (AC) hours for specific metrics.
      ii. **OT & DOT Calculations:**
         1. OT = 1.5x, DOT = 2x.
         2. A new line in reports should calculate **total OT** as:
            Total OT = OT Hours + (DOT Hours * 2)
      iii. **Adjustments:**
         1. AOT and AC need to be subtracted from total OT:
            a. 1 hour of AOT = full OT reduction.
            b. 1 hour of AC = 0.5 OT reduction.
   f. **Mapping in the System:**
      i. AOT to be identified using a unique service type (e.g., *Extra Coverage OT*).
      ii. Mapping to be handled via scheduling modules tied to client profiles.
      iii. Permissions to update services lie with Account Managers/Admins.
      iv. Service naming conventions to be standardized (e.g., OT in service title).
   g. **Department Hours Organization:**
      i. Each department (e.g., Admin, Dispatch, Patrol) should report:
         1. Total Hours
         2. Hours Worked
         3. OT, DOT, AOT, AC, DP
         4. Percentages and other key metrics

ii. Avoid repetition of "Standing" in every row; instead, group by department.