Minutes of Meeting

Date and Time	31 July 2025 09:00 PST	**Meeting type**	Zoom
Organiser	Mr. Rupesh	**Client**	Citywide

Attendees (Internal)
● Rupesh ● Kuldeep ● Jaspreet ● Sangita ● Vishesh ● Akash ● Ravinder ● Rahul ● Akash ● Amit ● Gurpreet
Attendees (Client Side)
● Tom, Teresa, Randy, Matt

Agenda
● **Discussions on the following:** ○ Server Upgrade and OS Issue ○ Impact During Upgrade ○ Current Build Status ○ Summary of Feature Updates (Release Notes) ○ Email Delivery Issues ○ Client Communication ○ Other Discussions ○ Analytics Demo ○ User Tracking Module ○ Shift to Leave Module Discussion ○ Twilio SMS Notification Planning

The following things are discussed:

1. **Server Upgrade and OS Issue:**
    a. **Kuldeep** reported a version issue with the Ubuntu OS (v23.x) on the production server, which was causing high CPU usage and timeouts during deployments.
    b. A temporary fix was applied via server restarts, but a permanent solution required an OS upgrade.
    c. Server was upgraded to **Ubuntu 24.x (LTS)** for long-term stability (5 years).
    d. A **snapshot backup** was taken before the upgrade for rollback safety.
    e. Post-upgrade, system performance has significantly improved.
    f. **Teresa** confirmed that after the switch, the system became the fastest she has experienced.
2. **Impact During Upgrade:**
    a. The **Citywide** client was most affected due to high data and user volume.
    b. Other clients also experienced issues (e.g., photo uploads, clock-out failures), but to a lesser extent.
    c. **Maintenance window emails** were sent to notify clients in advance. No negative client feedback was received.
3. **Current Build Status:**
    a. The system is running on the **latest build**; no reversion was done.
    b. Performance improvements are especially notable in:
        i. Report creation
        ii. Photo uploads
        iii. Sidebar responsiveness
4. **Summary of Feature Updates (Release Notes):**
    a. **QuickBooks integration**
    b. **Schedule Confirmation** by employees
    c. **Field Interview CRUD capability**
    d. **Geocode updates** on checkpoints
    e. **Call enhancements:** Suspect descriptions and call notes appear in reports
    f. **Incident reports:** Address and vehicle info added
    g. **Sidebar collapse and UI fixes**
    h. **Responding agency validations**
    i. **Character limits** and shift handling post-termination
    j. **Payroll, MAS emails & Invoice class codes**
    k. **Site qualifications** structure added
    l. **Scheduling & Shift Management:**
        i. OpenShift request and acceptance flow
        ii. Admin shift approval
        iii. Experience & qualification filters (site-based only in this release)
        iv. Overtime/Double-time control
        v. No-show and leave handling
        vi. Dispatcher dashboard visibility
        vii. Shift overlap rules & history tracking
    m. **Other Enhancements:**
        i. **Crime potential CRUD** added in company settings
        ii. **Call PDF logic update**

iii. **Training course changes**
iv. **Email routing issues** (esp. with Citywide) are under investigation.

5. **Email Delivery Issues:**
    a. Teresa noted that **email issues** from the Citywide site were observed and are being addressed by **Aryan**.
    b. Previous issues with **SendGrid** and ongoing issues with **Brevo** due to spam classification and strict opt-in policies were discussed.
    c. There's a need for **better email service validation** and possibly switching to more compliant providers.
6. **Client Communication:**
    a. A detailed **Release Notes document** was shared with the internal team and is intended for client sharing.
    b. Tom emphasized the importance of translating technical updates into **client-understandable language**.
    c. Feedback from Randy (representing Citywide) confirmed the clarity and value of the format used in the release notes.
7. **Other Discussions:**
    a. **Tom** asked for a demo and testing of the updated **employee tracking interface** (geocode on checkpoints).
    b. Further testing and feedback were planned post-demo with Teresa.
    c. Discussions closed with humor and team appreciation.
8. **Analytics Demo:**
    a. Updated Company Analytics Overview:
        i. Jaspreet presented updates on company analytics, including:
            1. Service-wise site comparisons (total sites, service types, period-based changes).
            2. Breakdown of service types (mobile, stationary).
        ii. **Action:** Update placeholders like "no data" to explicitly state "No Service" or "Zero Service" for clarity and reliability in interpretation.
    b. Departmental and Activity Code Tracking:
        i. Display for current vs. previous time period comparisons is in place.
        ii. Activity Code filtering now allows multi-code selection.
        iii. **Observation:** When no data exists for selected periods or codes, indicate this with a value (e.g., 0), not "NA" or "NAN".
    c. Employee and OT/DOT Time Verification:
        i. Activity tracking tiles now display OT/DOT breakdowns on hover.
        ii. Request to limit visible activity codes to simplify visuals (e.g., show only 1019/Return to Station when needed).
    d. Time Period Filter Enhancements:
        i. Selections range from year-to-date, monthly, or weekly.
        ii. Proposal: Add a dedicated "Search" button below filters to improve UX by avoiding accidental filter closures when clicking outside.
    e. Report Export Options:
        i. Teresa requested export support in **PDF** and **Excel** formats.
        ii. Kuldeep confirmed ApexChart supports **PNG**, **SVG**, and **CSV** exports, and PDF can be added with custom integration.
        iii. **Requirement:** Hover-based data must be shown in static form on export outputs.
    f. Summary View for Charts:

i. Tom emphasized:
    1. Summary data should be displayed without needing hover (for readability, printing, and PowerPoint presentations).
    2. Each graph must include visible totals and breakdowns.
    3. Remove "NA" values—replace with “0” or appropriate labels.

g. Dual View Suggestions:
    i. Jaspreet proposed:
        1. **Two views:** Graphical (candles/pie) + Layman Summary view.
        2. Tom approved but requested that summary still be visually close to charts.
    ii. Summary per candle and overall totals must be clearly visible and exportable.

h. Custom Summary Controls:
    i. Suggested implementation of toggle:
        1. **"Show Total"** – aggregate all selected codes into a single summary.
        2. **"Breakdown per Code"** – individual summaries per code.
    ii. Comparison made to QuickBooks-like logic for contextual summaries.

i. Employee Role Comparison:
    i. Comparison of employee counts by roles between periods (e.g., 346 employees across both periods).
    ii. Shift status breakdown: scheduled, open, completed.

j. BEAT Revenue Comparison & Teresa's Template:
    i. Jaspreet presented BEAT revenue comparisons.
    ii. Teresa to share updated BEAT tracking spreadsheet (includes: hits per beat, price per hit, monthly revenue, revenue goal per beat).
    iii. Tom emphasized:
        1. Need for more actionable financial insights (goal vs. actual, delta per beat).
        2. View must include average hits per beat and summary at the bottom.
        3. Graphs feel crowded—listing/table view is preferable for large datasets.
    iv. **Action:** Implement toggle between graphical and listing/table view for better scalability and clarity.

k. Activity and Incident Comparisons:
    i. Dashboard now includes regular, high-priority, and incident activity comparisons across periods.
    ii. Filters should support shorter periods (e.g., 10-15 days) for more relevant snapshots.

l. UI/UX Suggestions:
    i. Improve map and time period picker behavior:
        1. Add a **“Search”** button post-filter selection to confirm and apply filters, preventing accidental map closures or confusion.

m. Current View Explanation:

i. Jaspreet walked Tom through the analytics dashboard showing:
    1. Regular activities: 12
    2. Prior activities: 14
    3. High-priority activities: 25
ii. No such activities were reported for the comparison (previous) period.
iii. Current visualizations reflect a summary of the top three priority categories combined.

n. Requirement to Make Data Points Clickable:
    i. Tom emphasized the need for **interactivity**:
        1. He wants to **click on the red (high priority), yellow (prior), and green (regular)** report totals shown in the dashboard.
        2. Clicking on these should show a **list of detailed reports** (e.g., the 25 high-priority reports) with the same structure as the search result pages.
        3. This would allow leadership roles (like CEO/Chief) to **drill down** and take action based on insights.
        4. Analytics should support **decision-making**, not just highlight problems.
    ii. Functionality Expectations:
        1. System already calculates and displays the report counts by priority level.
        2. The requirement is to **auto-filter and display the underlying report data** when a user clicks a category (Red/Yellow/Green).
        3. Time period should be pre-selected based on the existing dashboard filter, and results should reflect that context.
        4. Output format should match the report search results for ease of use.
    iii. Next Steps:
        1. Make the **priority bars (Red, Yellow, Green)** on the dashboard **clickable**.
        2. Clicking should **redirect or open a detailed report view** with results filtered for that priority type and selected time frame.
        3. Implement backend logic to fetch and display the matching entries as per existing filter and priority.

o. Current Activity Display in the Map:
    i. The existing map displays site names, addresses, and activity code frequency.
    ii. Site colors change based on average priority:
        1. Green for normal activity levels.
        2. Red for high-priority activity concentrations.

p. Need for Enhanced Data Visibility:
    i. **Tom** requested more contextual data:
        1. Site name.
        2. Beat assignment.
        3. Total number of activities.
        4. Breakdown of those activities (not just total).

ii. **Teresa** emphasized the importance of seeing exact activity codes, not just their priority categories (e.g., 415s vs. 602s).
iii. Priority classification alone is insufficient for actionable insights.

q. Activity Code Breakdown:
   i. Jaspreet confirmed it is possible to allow users to click a site and view:
      1. Time period.
      2. Priority breakdown.
      3. Detailed reports showing exact activity codes.

r. Clarity in Use of Priorities vs. Activity Types:
   i. Teresa and Tom highlighted:
      1. Having only "high" and "low" priority is vague.
      2. There's a risk of misinterpreting the map if breakdowns aren't shown.
      3. Need to know not just that a site is "red" but *why* (e.g., 20 shootings vs. 20 trespasses).

s. Purpose of the Crime Map:
   i. **Tom** explained that the heat map is meant to quickly help decision-makers:
      1. Identify problem areas.
      2. Understand the cause (specific type of activity).
      3. Formulate action based on activity type and time.
   ii. The map should show:
      1. Type of high-priority activity.
      2. Volume of incidents.
      3. Time patterns (e.g., if they occur between 2–5 p.m. or at night).

t. Design Decision: Transition to Heat Map:
   i. **Kuldeep** suggested and team agreed to fully switch from current map to a **heat map** format.
   ii. This would allow more granular controls:
      1. Time and date filters.
      2. More dynamic visual representation.
      3. Optional drill-down on individual data points.

u. Reference: Miami-Dade Crime Map:
   i. **Randy** demonstrated the Miami-Dade Police Department's crime map.
      1. Highlights include multiple filters (type, time, area).
      2. Ability to focus only on relevant crimes (e.g., exclude fraud/miscommunication cases).
      3. Clean layout with incident-specific insights.

v. Filtering and Noise Reduction:
   i. **Tom** raised concern over clutter due to low-priority entries (e.g., 1153 – Security Check).
      1. Suggested the heat map should **exclude low-priority/no-impact** entries.
      2. Only **medium and high-priority** incidents should be represented.
      3. High volume + high severity incidents should visibly

dominate the map.

w. Icon and Visual Enhancements:
    i. Teresa & Randy proposed:
        1. Assigning **icons to activity codes** during creation (e.g., gun for shooting, fist for assault).
        2. Possibly allow users to select from a widget/dropdown of icons.
        3. Create a **customizable legend** based on activity categories and visuals.

x. Final Consensus:
    i. Move forward with the **heat map approach**.
    ii. Ensure breakdown per site includes:
        1. Activity types (with counts).
        2. Time of occurrence (with range).
        3. Beat assignment.
    iii. Focus map on **medium and high-priority** incidents.
    iv. Icons and additional visuals to be considered post core implementation.

9. User Tracking Module:

a. Overview & Demonstration:
    i. Jaspreet showcased the updated user tracking functionality. The map now visually represents:
        1. User movement from one location to another.
        2. Logs showing when shifts started and reports were created.
        3. Different types of logs with counts based on location activity.

b. Tom's Feedback:
    i. Confirmed that the updates now show the required officer activity details.
    ii. Appreciated the clarity when clicking a location and understanding what an officer did at each point.
    iii. Emphasized that this is what he was expecting from the feature.

c. Landing Page & Logged-in Users Display
    i. Kuldeep explained:
        1. On opening the User Tracking menu, the system displays a list of all logged-in users.
        2. Details shown include:
            a. Site name
            b. Agent name
            c. Last known location timestamp (e.g., "1 hour ago", "5 minutes ago")
            d. Current/last site of the agent
        3. Clarified terminology: this is referred to as "Last Known Location".
    ii. Tom's Suggestion:
        1. Suggested using the term "Last Known Location" with associated "Activity Code" for clarity.

d. Map Behavior for Stationary vs. Moving Guards:
    i. Jaspreet explained how the system displays location points:
        1. For stationary guards (e.g., standing posts), map shows points

where reports were submitted.
2. Multiple sequential reports are numbered and shown on the map.

ii. Kuldeep added:
1. If the agent did not travel much, routes (arrows/lines) may not be displayed.
2. If they moved significantly (e.g., around a city), directional paths would be shown.

iii. Teresa's Feedback:
1. Preferred the pin-point view over connecting lines.
2. Found it clearer to see individual stops.

e. Location Tracking without Report Submissions:
i. Question by Teresa:
1. How will location be shown if the user doesn't submit a report but is still moving?

ii. Kuldeep Response:
1. System will display location dispersions.
2. Custom markers or indicators for idle status can be introduced if needed.

f. Competitor Comparison & Playback Feature
i. Tom's Input:
1. Recalled a feature in a competitor app (TrackTech) which:
a. Allowed playback of officer movements during a selected time period.
b. Showed movement visually on a map with a timeline ("playback mode").
c. Enabled hover to view activities done at each point.
2. Reiterated that:
a. This functionality helps **prove accountability** in cases where clients question an officer's presence or activity.
b. This playback would allow presenting a timeline of what the officer did during a shift (e.g., "Watch this video – Kuldeep was at A, B, C...").
c. There's also value in seeing a **real-time summary of current assets** in the field (who is working, where they are, and what they're doing).

ii. Purpose Clarified:
1. **Tracking Mode:** To verify and prove officer movement and duty.
2. **Overview Mode:** To visualize all on-duty agents and their current positions for operational oversight.

g. Development Roadmap & Commitment:
i. Kuldeep acknowledged:
1. TrackTech reference video had been reviewed.
2. Their team is working toward incorporating similar playback features.
3. Goal is to integrate this into the user tracking module soon.

10. Shift to Leave Module Discussion

a. Agenda item was to begin reviewing the **Leave Approval Module** under the

RS-247 officer login.

b. Leave Request & Edit Workflow:
    i. Discussion Points:
        1. Concern raised by a client regarding the inability to edit a leave request post-approval.
        2. Requirement: An employee should be able to either delete an approved leave or edit it and reinitiate the approval process.
        3. Suggested Workflow:
            a. If a leave request is edited after being approved, a warning should appear:
                i. "Your leave has already been approved. If you modify it, it will require approval again and cancel the previous request."
            b. Upon confirming, the system will reset the leave status to “Pending” for reapproval.
            c. Editing should be allowed even during the leave period.

c. Leave History Log:
    i. Discussion Points:
        1. Need to maintain a history log showing:
            a. Who created, approved, or edited the leave.
            b. When actions were taken.
            c. Similar to call log updates (Assigned → Updated → Approved, etc.).
        2. Two display options discussed:
            a. Modal window showing full history.
            b. Redirecting to a new history page.
    ii. Decision:
        1. Use a modal view for displaying leave history logs.
        2. Include all actions with timestamps and users involved.
    iii. Action Items:
        1. Add “View History” button on leave listing.
        2. Design modal to display leave log with proper formatting.

11. Twilio SMS Notification Planning:

a. Discussion Points:
    i. Aryan has created the Twilio account and is in the process of document verification.
    ii. Goal: Define where and when SMS notifications should be triggered within the system.

b. **Initial Agreement:**
    i. SMS should **not** be used for every notification.
    ii. SMS usage should be **limited to critical events**, such as:
        1. New shift assignments.
        2. Schedule publication.
        3. Time-off request approvals.
    iii. Push notifications from the app will still handle most in-app events.

c. Future Scope:
    i. Need to finalize:
        1. Tax implications.

2. Billing automation.
3. Interface for client-side upgrade requests.