Minutes of Meeting

Date and Time	30 October 2025 09:00 PST	**Meeting type**	Zoom
Organiser	Mr. Rupesh	**Client**	Citywide

Attendees (Internal)
• Rupesh • Kuldeep • Jaspreet • Ravinder • Ajay • Gurpreet • Pankaj • Akash • Rahul
Attendees (Client Side)
• Tom, Teresa, Matt, Randy

Agenda
• **Discussions on the following:** ○ Scheduling Module Updates ○ Instance Setup Delays ○ Analytics Demo(Client/Company/Employee Tabs) ○ User Tracking Feedback

The following things are discussed:

1. **Scheduling Module Updates**
    a. **Discussion Points:**
        i. **Copy-Paste Functionality:**
            1. Currently, when copying and pasting a schedule, both the *person and times* are being copied.
            2. The expected behavior is to copy **only the person**, not the scheduled time.
            3. Jaspreet confirmed that the **developer is already working on this issue** in conjunction with drag-and-drop enhancements.
        ii. **Drag & Drop + Site Assignment:**
            1. A confirmation notification will appear before assigning a site to an officer.
            2. Once confirmed, the site will automatically assign to the officer.
    b. **Action Items:**
        i. Developer to fix copy-paste logic to exclude time slots.
        ii. Confirmation popup implementation for site assignment to be finalized and tested
2. **Instance Setup Delays**
    a. **Discussion Points:**
        i. Tom raised a concern that **a new client instance setup** has been pending for over a week.
        ii. He reiterated that there should always be **five instances pre-created and ready** for onboarding.
        iii. Organizer confirmed:
            1. **Five trial instances are ready** and verified.
            2. **Data cleanup** is the only pending step before handing over to the client.
            3. A **QA verification sheet** was shared by Ravinder identifying issues that are now being fixed to avoid recurrence.
    b. **Action Items:**
        i. Data cleanup of the new instance to be completed **today**.
        ii. QA to re-verify instance functionality post-cleanup.
        iii. Maintain 5 pre-created, verified instances available for quick onboarding.
3. **Analytics Demo(Client/Company/Employee Tabs)**
    a. **Invoice Analytics**
        i. **Discussion:**
            1. Added a **monthly filter** to show current and previous month summaries for *paid, unpaid, and total* invoice amounts.
            2. Clicking on **paid** redirects to invoice listings filtered by payment status.
            3. **PDF and Excel export** functionalities are now working with relevant columns.
        ii. **Feedback from Tom:**
            1. Include additional metric: **Past Due Amount**.

2. In future updates, add breakdown by:
    a. Less than 30 days past due
    b. 30–60 days
    c. 60–90 days
    d. Over 90 days past due

iii. **Action Items:**
1. Add “Past Due” and overdue duration buckets in the analytics view.
2. Keep export features aligned with visible data.

b. Service Revenue Comparison

i. **Discussion:**
1. Comparison between **stationary and mobile revenue** for current and previous months.
2. Graph and Excel export reflect identical data sets.

ii. **Feedback from Tom:**
1. Logged hours should not appear in revenue reports; revenue should be calculated only from:
    a. **Scheduled/Billable hours** on the client profile.
    b. **Projected or actual billing** based on schedule, not log-ins or log-outs.
2. Patrol (mobile) billing to be derived from:
    a. Projected hits × price per hit (if projected).
    b. Report log entries (if actual).

iii. **Action Items:**
1. Remove logged hour metrics from the revenue comparison report.
2. Link revenue calculations directly with scheduled/billable hours or patrol projections.
3. Deploy to Citywide instance for live validation against QuickBooks data.

c. Call Analytics

i. **Discussion:**
1. **Total Calls, Past Calls, Open Calls** now viewable and exportable.
2. Filtering works for specific call statuses.

ii. **Feedback from Tom:**
1. The **Call Response Time Chart** needs improvement:
    a. Display **average, earliest, and latest response times**.
    b. Include **comparison with previous period** showing percentage change or time improvement.
    c. Simplify chart by removing unnecessary bottom site listings.
    d. Ability to filter and compare multiple sites together, showing cumulative metrics.

iii. **Action Items:**
1. Update chart visualization for call response times.
2. Include summary stats (average, earliest, latest, % change).
3. Support multi-site aggregation in filters.

d. Incident Frequency Comparison

i. **Discussion:**
   1. Comparison of incidents by **Activity Code** with a limit of **five codes per selection**.
   2. Provides visibility into trends between current and previous periods.

ii. **Tom's Clarification:**
   1. Confirmed that overtime/double-time breakdowns belong to **activity tracking**, not this module.

iii. **Action Items:**
   1. Retain current incident comparison logic.
   2. Ensure activity tracking enhancements (regular/OT/double-time) remain separate.

e. **Dashboard Columns and Design Adjustments**

i. **Discussion:**
   1. Tom requested that all column headers (like *Total Hours*) appear as **single-line text** for visual consistency.
   2. Jaspreet confirmed the current layout might look stretched due to a smaller screen but agreed to refine the design for clarity and uniformity.
   3. Tom also noticed a misaligned **dark blue graphic** in one of the charts. Jaspreet clarified that it's related to **pending design updates for dark mode**, which will be corrected in the next revision.
   4. Tom requested **percentage representation** alongside the numeric values for service hours comparison. Jaspreet confirmed that feedback for percentage inclusion has already been passed to the developer.

ii. **Action Items:**
   1. Standardize column header layout to single-line text.
   2. Fix dark mode graphic alignment.
   3. Add percentage display for service hours comparison chart.

f. **Weekly, Bi-weekly, and Quarterly Filter Enhancements**

i. **Discussion:**
   1. Jaspreet explained that **monthly and yearly filters** are already implemented; **weekly, bi-weekly, and quarterly filters** are still pending as they require complex logic for date range calculation.
   2. Tom suggested a **simplified workaround**:
      a. When a user selects a date, the system automatically defines the week as that date plus the next 6 days (7-day range).
      b. For bi-weekly, the system should capture 14 days from the selected date and compare with the previous 14 days.
      c. For quarterly, users can directly pick from **four fixed quarters** (Q1, Q2, Q3, Q4) starting from January, April, July, or October.
   3. Jaspreet mentioned that the logic is more complex if users need to view past data (e.g., weekly details from June 2024),

as it requires both **month and year** selection.

4. Tom emphasized that the logic should focus on **dynamic date range selection** rather than pre-fixed intervals to improve usability.

ii. **Action Items:**
   1. Review Tom's proposed date selection logic with the development team.
   2. Estimate implementation timeline for weekly, bi-weekly, and quarterly filters.
   3. Provide updated ETA in the next call.

g. **Site Distribution Analytics (Service Type Breakdown)**

i. **Discussion:**
   1. The existing chart is titled **"Service Type Base Site Distribution"**, which Tom found confusing.
   2. After discussion, the group agreed on renaming it to **"Number of Sites Based on Service"** for better clarity.
   3. Breakdown logic:
      a. **Mobile Sites** – Sites with only mobile service.
      b. **Stationary Sites** – Sites with only stationary service.
      c. **Hybrid Sites** – Sites offering both mobile and stationary services.
      d. **Total Sites** – Unique count of all sites, regardless of service type.
   4. Tom and Teresa clarified that a **hybrid site** should count once under both service types but still be treated as **a single entity** in the total count.
   5. Example shared:
      a. If there are 10 total sites — 4 stationary, 4 mobile, and 2 hybrid — the analytics should display:
         i. **Standing Sites:** 6 (4 stationary + 2 hybrid)
         ii. **Mobile Sites:** 6 (4 mobile + 2 hybrid)
         iii. **Hybrid Sites:** 2
         iv. **Total Sites:** 10
   6. Jaspreet confirmed the understanding and mentioned that the dashboard allows filtering **enabled/disabled sites**, which will dynamically adjust the counts.

ii. **Action Items:**
   1. Rename chart to *Number of Sites Based on Service*.
   2. Implement the agreed breakdown logic (including hybrid overlap).
   3. Include enable/disable site filters in the report view.
   4. Ensure Excel export reflects accurate totals and structure.

h. **OPS Reports Overview**

i. **Discussion:**
   1. Jaspreet presented the *OPS Reports Graph*, explaining that it currently shows the number of hours worked per department.

ii. **Clarification:**
   1. Tom inquired whether the displayed data represented *hours worked* or *hours billed*.

a. Jaspreet and Akash confirmed that the data shows **hours worked**.

iii. **Feedback by Tom:**
   1. The title “Company Operations Records” is **too broad**.
   2. It should be renamed to **“Operational Hours per Department”** or **“Company Operational Hours by Department.”**

i. **Report Enhancement Requests**
   i. **Tom’s Feedback:**
      1. The graph should clearly distinguish between:
         a. **Hours Worked**
         b. **Hours Billed**
      2. Both values should be displayed **side by side per department**.
      3. Include **total hours**, **percentages**, and **comparisons to the previous period**.
   ii. **Jaspreet’s Response:**
      1. Confirmed that feedback for “percentage and comparison” has already been given to the developers.
      2. The report will be designed to match other graphs with numeric and visual representation.

j. **Display and Export Format**
   i. **Tom’s Suggestion:**
      1. The OPS Report should not only be visual (graph-based) but also contain **tabular numeric data**.
      2. A **pie chart** representation could be used to show total operational hours per department.
      3. Upon clicking the pie chart, users should be able to **export detailed Excel reports**.
   ii. **Teresa’s Confirmation:**
      1. This functionality should appear when users click “Export.”
      2. Both Tom and CommandHub expressed satisfaction if data populates automatically during export.
   iii. **Timeline Commitment:**
      1. Jaspreet confirmed efforts to optimize this and provide results by **next week**.

k. **PDF Export Issue**
   i. **Observation:**
      1. Jaspreet raised a concern about **data truncation during PDF export** due to scrollable content.
      2. Only visible (on-screen) data is exported, while scrolled data is not included.
   ii. **Tom’s Feedback:**
      1. The issue is related to **layout and graphic sizing**.
      2. The report section should be **expanded to fit all data**, avoiding vertical scrolling.
      3. Emphasized a “**common-sense design fix**” — ensure all visible data fits without scroll bars.

l. **Employee Comparison Section**

i. **Overview:**
    1. Jaspreet demonstrated an employee comparison chart showing:
        a. **Current vs. Previous period** data
        b. **Clickable redirection** to employee listings (active, inactive, terminated)

ii. **Tom's Feedback:**
    1. Requested inclusion of:
        a. **Numeric differences**
        b. **Percentage change**
    2. Emphasized that analytics should primarily display **numbers and trends**, with graphs being supplementary.

iii. **Action Items:**
    1. Jaspreet confirmed future graphs will follow this numeric + visual comparative model.

m. **Beat Revenue Comparison**

i. **Overview:**
    1. The section currently displays:
        a. Revenue per month
        b. Properties on route
        c. Hits per route
        d. Average cost per hit
        e. Budget deficit (to be renamed)

ii. **Tom's Feedback:**
    1. Rename **"Budget Deficit"** to **"Target Revenue"** or **"Target Deficit."**
    2. The term *budget* should be replaced with *target revenue* to better reflect its intent.
    3. System should allow **manual entry** of a *target revenue* value per beat, against which performance is compared.

iii. **Action Item:**
    1. **Kuldeep** confirmed that an **input field** will be added next to *Beat Revenue Comparison* to enter the target revenue per beat.
    2. The **target deficit** will be automatically calculated based on the difference between actual and target revenues.

n. **Activities Comparison (Analytics Section)**

i. **Discussion:**
    1. The *Activities Comparison* section currently shows total activities categorized as Regular, Priority, and High, along with their respective percentages.
    2. Tom emphasized that **scrolling should be eliminated** — all data must be visible on one screen for proper display and printing (as scrolled content won't appear in PDF exports).
    3. Jaspreet confirmed that current details appear on-click but will be redesigned to show **all data simultaneously** without requiring interaction.
    4. Tom insisted that **numbers must be visible across all columns**, as the data should be comprehensive at first glance.

ii. **Action Items:**
   1. The dev team will update the design to show all categories (Regular, Priority, High) and their data without needing clicks or scrolling.
   2. Ensure print/PDF exports display complete data.

o. **Hotspot Incidents by Site and Property**

i. **Discussion:**
   1. Current module shows low, medium, and high priority incidents, redirecting to full reports when clicked.
   2. Tom approved the redirect behavior but requested a **pie chart representation** for incident data.
   3. Each incident category (low, medium, high) should include **actual counts, comparisons, and percentage changes** over time.
   4. Jaspreet agreed to implement this change.

ii. **Action Items:**
   1. The dev team will add a pie chart summarizing total incidents by type (low, medium, high).
   2. Include numerical data, comparisons, and percentage change metrics.

p. **Employee Analytics Section**

i. **User Tracking**
   1. The section showing logged-in employees currently has a **bug** and will be fixed.
   2. Tom requested **removal of the section** entirely from the analytics page; users can directly navigate to the status tab.

ii. **Schedule Overview**
   1. Displays created, missed, and scheduled shifts.
   2. Tom approved the visual layout.

iii. **Payroll Summary**
   1. Shows regular, OT, DT, paid/unpaid amounts.
   2. Tom confirmed no need for clickability; visual graph is sufficient.

iv. **Call and Incident Analytics**
   1. Displays total assigned calls, average call response time, and report types.
   2. Tom questioned if this pertains to the company or employees.
   3. Jaspreet clarified: it is per-employee, showing the number of calls, reports, and response times for each officer.

v. **Attendance Analytics**
   1. Displays total shifts, on-time, late check-ins, and missed shifts.
   2. Can also be filtered by employee.
   3. Tom confirmed this is acceptable.

vi. **Training & Certification**
   1. Shows total courses, completed, assigned, attempted, expired, and failed.
   2. Tom approved.

vii. **Work History & Remarks**

1. Displays latest five remarks submitted to officers, with redirect to detailed view.
2. Feedback to developer: **open details in a new tab**.
3. Tom suggested turning this into a **pie chart** representing remark reasons (promotion, attendance, etc.) with totals, percentage changes, and category comparisons.

viii. **Action Items:**
1. Remove User Tracking widget from analytics.
2. Create a pie chart for remarks categorized by reason.
3. Add direct filters for all analytics to allow user-wise visibility.

q. **Training and ERM Analytics Placement**

i. **Discussion Points:**
1. Teresa and Tom discussed redundancy of analytics under both the *main analytics page* and their respective modules (Training & ERM).
2. Consensus:
   a. Training and ERM analytics will remain under their dedicated modules **and** will also show **summarized pie charts or top 10 overviews** in the company analytics page.
3. Tom emphasized this duplication ensures a **quick "board meeting-style overview"** without navigating multiple sections.

ii. **Access-Level Note:**
1. Analytics visibility should depend on **user access roles**:
   a. *Directors* or *Admins* → See all analytics (company-wide).
   b. *Module-specific roles* → See only relevant analytics (e.g., ATS, Training).

iii. **Action Items:**
1. Duplicate summarized analytics for ERM and Training modules into Company Analytics.
2. Configure visibility by access level:
   a. Directors see all analytics.
   b. Role-based users see only module-specific analytics.

r. **Data Comparison & Visualization Standards**

i. **Discussion:**
1. Tom reinforced two key rules for analytics:
   a. Always present **accurate numbers**.
   b. Always include **comparisons and percentage changes**.
2. Jaspreet confirmed that all copied graphs (from module to analytics) will include comparative data (previous vs current period).

ii. **Action Items:**
1. [Ditstek] Apply comparison metrics and percentage change display to all analytical charts and tables.
2. Ensure data accuracy before release.

s. **Data Export and Printing**

i. **Discussion:**
   1. Tom requested a single-click **“Export All as PDF”** feature for analytics.
   2. Jaspreet confirmed that **PDF export functionality already exists**, which captures the entire analytics page.
   3. The system scans and exports all visible sections.

ii. **Action Items:**
   1. Optimize the export process for speed and ensure all visual elements and data tables are captured fully in the PDF.

t. **Release and Verification Timeline**

i. **Discussion:**
   1. Ravinder confirmed that all discussed changes and fixes will be included in the **next release**.
   2. Jaspreet added that **data verification** will also be required before release.
   3. Tom cautioned the team to **commit realistic timelines** — avoid overpromising.

ii. **Action Items:**
   1. Share a **timeline and task breakdown** for implementing discussed feedback.
   2. Verify data accuracy prior to build submission.
   3. Await delivery and validation in the next release.

4. **User Tracking Feedback**

a. **Officer Status Page – UI and Functionality**

i. **Discussion Summary:**
   1. Tom expressed **strong dissatisfaction** with the current *Status Page* design and behavior, calling it unprofessional and confusing.
   2. The current process requires clicking outside the active window for entries to save — this needs correction.
   3. The color indicators (green/red) and the “14 activities” display were unclear to users, with Tom questioning their meaning and utility.
   4. Tom emphasized that as a **manager**, he expects to see a clear and detailed **activity log** — what the officer did, when, and in what sequence — not just a numerical activity count.

ii. **Feedback:**
   1. The “14 activities” currently represent tracking points/locations captured during a specific period but **lack contextual clarity** (no event detail, sequence, or meaning).
   2. Tom labeled the data as **“useless and misleading”**, emphasizing the need for meaningful, action-based tracking.

iii. **Action Items:**
   1. Redesign the *Status Page*:
      a. Include **clear event descriptions** (e.g., movement, report, idle, etc.).
      b. Add **sequence numbering or timeline visualization** (1st, 2nd, 3rd activity, etc.).
      c. Fix the **submission behavior** — form should save on

click, not on outside click.

d. Clarify color indicators with a legend (e.g., green = active/on duty, red = inactive/off duty).

b. **Data Accuracy & Excessive Tracking**

i. **Discussion Summary:**

1. Tom and the CommandHub team identified **false activity tracking** — an officer who was *off duty* showed 1,659 activities overnight.
2. This raised questions about **data validity** and **tracking logic**.
3. Tom described this behavior as "completely inaccurate" and "misleading," stating it damages client credibility during demos.

ii. **Additional Inputs:**

1. Randy noted that tracking appears to occur **every second**, leading to excessive and redundant data.
2. The system was possibly tracking users **even when off duty**, resulting in unnecessary data logs.

iii. **Action Items:**

1. **Investigate and fix data tracking logic** to ensure:
2. QA will verify accuracy by cross-referencing actual shift data with tracking logs.

c. **Legal and Ethical Implications**

i. **Discussion Summary:**

1. Tom stressed that **tracking employees off-duty is a legal violation** and must be stopped immediately.
2. He directed the development team to **disable all off-duty tracking** until the logic is corrected.

ii. **Consensus:**

1. Randy and CommandHub agreed that the system must **only track during scheduled shift times** to comply with labor and privacy laws.
2. Kuldeep confirmed that the tracking logic would be updated accordingly.

iii. **Action Items:**

1. Immediately **disable tracking for off-duty employees**.
2. Implement logic to **automatically restrict tracking to shift hours**.
3. Share a document with Teresa outlining:
   a. New logic design.
   b. Implementation approach.
   c. Timeline for release.

d. **Ideal Tracking Flow and Comparison**

i. **Tom's Recommendations:**

1. Referenced an existing system, **Silvertrack**, as a benchmark for how tracking should function.
2. Desired output:
   a. A **quick visual overview** (10–60 seconds) showing guard movement during a time range.
   b. Sequential markers indicating where the officer

moved, stopped, or performed an action.

c. On click — show **activity type** (e.g., walking, driving, idle, or report submission).

d. Ability to distinguish:

   i. **Active Movement** (walking/driving).

   ii. **Idle State** (stationary, no activity).

   iii. **Action Taken** (report, photo, patrol check, etc.).

e. Include **duration of idle or action periods**.

ii. Tom emphasized:

1. If the current tracking module cannot meet these standards soon, it should be **temporarily disabled** to avoid misleading data and negative client perception.

iii. Action Items:

1. Redesign the *Officer Tracking* feature:
   a. Create a **visual timeline/map** showing movement over time.
   b. Add event layers (movement, stop, report).
   c. Introduce time-based summaries (e.g., “Idle 15 mins”, “Moved 500m”, “Report logged”).
2. Prepare a **demo-ready prototype** reflecting this flow before re-enabling tracking.

e. Temporary Disablement of Tracking Module

i. Discussion:

1. Tom approved **temporary disablement of the current tracking feature** until improvements are implemented.
2. Kuldeep confirmed that the dev team will:
   a. Disable current tracking immediately.
   b. Prepare a revised design document for review.
   c. Re-enable tracking post-approval and QA testing.

ii. Action Items:

1. Disable existing officer tracking feature immediately.
2. Share updated implementation document with Teresa and Tom.
3. Re-enable tracking post-validation only.

f. Summary of Tom’s Final Directive

i. **Disable off-duty tracking immediately** — prevent legal risks.

ii. **Implement new logic** to track only during active shifts.

iii. **Redesign tracking visualization** for clarity, sequence, and meaningful reporting.

iv. **Ensure reduced data frequency** (ping every 1 minute or as appropriate).

v. **Provide accurate, summarized activity overview** (with stop/move/action distinctions).

vi. **Disable misleading tracking modules** until fixes are live.