Minutes of Meeting

Date and Time	03 September 2025 09:00 PST	Meeting type	Zoom
Organiser	Mr. Rupesh	**Client**	Citywide

Attendees (Internal)
• Rupesh • Kuldeep • Jaspreet • Sangita • Vishesh • Ravinder • Rahul • Sai • Ajay • Gurpreet • Amit
Attendees (Client Side)
• Tom, Teresa, Matt

Agenda
• **Discussions on the following:** ○ Training Module Issue and Discussion ○ Call History Demonstration ○ Multiple Activity Codes on a Call ○ Call Priority Levels ○ Handling Spam or Unverified Caller Information ○ Priority Level Display in Reports ○ UI & Color Implementation ○ Reports & Forms Integration Scenarios ○ Multiple Activity Codes & Forms ○ Forms Linked to Activity Codes ○ Dispatcher Permissions ○ Call Dropdown in Forms ○ Flexibility in Forms ○ Edge Case Handling ○ Callouts in Scheduling ○ Holiday Hours in Contracted vs Operating Hours ○ Geofencing in Calls

- Primary vs Backup Units in Calls
- Multiple Activity Codes per Call
- Dispatcher Edit Permissions
- Bug – Duplicate Reports (Matthew Queen)
- QuickBooks Integration Keys
- Fleet Management & KPI
- Payroll Report Issue (Urgent)
- Build Release Timing

The following things are discussed:

1. **Training Module Issue and Discussion:**
    a. **Problem:** Teresa (while creating a course under regular admin role) could not assign herself as an instructor.
    b. **Cause:** Role permissions conflict – company admin/super admin roles were excluded from the instructor dropdown.
    c. **Fix:**
        i. Update: Company Admins and Super Admins will now appear in the dropdown after the next release.
        ii. Default instructor logic clarified:
            1. Whoever creates the course should be assigned as the default instructor.
            2. They should still be able to change it to someone else later.
        iii. Agreed that making "Company Admin" the default instructor for all courses is not practical.
    d. **Decision:** Course creator = Default instructor. Admins will appear in the dropdown but not forced as default.
    e. **Use Case:** Delegated Course Creation
        i. **Scenario Raised by Randy:**
            1. Example: Teresa may ask Randy to create a draft course, but she remains the final instructor.
            2. Also possible for CEOs or department heads to be the course owners while staff set them up.
        ii. **Decision:** System must allow delegation where one person creates the course but another is set as instructor.
    f. **Training Test Results (Officer 1972 Case)**
        i. **Issue:** Officer's test showed failure despite correct answers.
        ii. **Findings:**
            1. One answer was actually wrong; screenshot verified.
            2. Passing criteria set at 200 points = 100% required.
        iii. **Resolution:** Criteria clarified and updated. No further issue.
    g. **Evaluator Role Visibility Issue**
        i. **Problem:** Teresa, assigned as an evaluator, could not see courses in Training even though she was marked as evaluator.
        ii. **System Behavior Explained by Sangita:**
            1. Currently, only instructors (or course creators) can view their assigned courses.
            2. Evaluators do not automatically get course visibility.
        iii. **Action:** Sangita to re-verify evaluator role visibility logic. If missing, a trial ticket will be created.
    h. **Training Module Release Status**
        i. **Question (Tom):** Has the Training module been released to all users?
        ii. **Update (Jaspreet):** Not yet. Planned for the upcoming push.
2. **Call History Demonstration:**
    a. **Call History Trigger & Logic**
        i. Call history should be displayed once a phone number is entered.
        ii. An icon (or indicator) will show if there's any prior history for that

number.

iii. Clicking the indicator should open the call history.

iv. **History linkage:** Based **only** on phone numbers (not site).

v. Site filter option will also be included in the final version.

b. Filtering and Display Requirements

i. Filters:

1. Users must be able to filter by site, number, and date.
2. Current dev version doesn't support site filtering yet → to be added.

ii. Columns Required:

1. Assigned user
2. Date/time of call
3. Activity codes
4. Reporting party name
5. Call description

iii. Customization:

1. Users should be able to add/remove columns per preference.
2. Supports both HOA-style clients (multiple addresses per site) and single-building clients.

c. Call Location vs Site

i. **Site:** Name of the property.

ii. **Call Location:** Specific address where the incident occurred.

iii. Decision: Keep both but allow users to deselect columns to avoid clutter.

d. Number Updates & History

i. Scenario: If a dispatcher edits a call and changes the phone number → history should now attach only to the updated number.

ii. Decision: History is tied to the *current* phone number only. Past associations will not carry forward.

e. History View & User Experience

i. Instead of just an "i" icon, show a **summary (e.g., "4 entries found – View More")**.

ii. Clicking "View More" should open additional details:

1. Must not replace the main working tab.
2. Should open in a secondary tab or window (non-primary) to prevent timeouts.

f. History in Different Views

i. History should be visible in:

1. **Edit Call screen**
2. **View Call screen** (so dispatchers can identify frequent callers without editing).

g. Labeling of Call Sites

i. **Issue:** "Patrol Site" wording still appears in call sheet when adding a call.

ii. **Feedback:** Tom requested that the system should dynamically reflect the site type:

1. Patrol Site → "Patrol"
2. Standing Site → "Standing"

iii. **Decision:** Remove "Patrol Site/Patrol Log" references. Use simplified terminology (“Site” with context-specific type).

    iv. **Action:** Jaspreet’s team to update UI and ensure previous references are cleaned up.

3. **Multiple Activity Codes on a Call**
    a. **Request:** Ability to add a second or third activity code per call.
    b. **Status:** Ticket already raised by Teresa.
    c. **Follow-up:** Needs prioritization in development.
4. **Call Priority Levels**
    a. **Proposed Priorities:** Low, Medium, High, Hot.
    b. **Issues Identified:**
        i. Display order was incorrect (alphabetical instead of logical).
        ii. Placement needed to be **next to Activity Code** at the top of call form (not lower down).
    c. **Decisions:**
        i. Final order: **Low → Medium → High → Hot**.
        ii. Priority field to appear immediately under Activity Code.
        iii. Color coding to be applied (consistent with demeanor-style UI).
        iv. Calls logged from client side will retain **pink highlight**.
    d. **Clarifications:**
        i. High Priority = escalated/manager request.
        ii. Hot Call = in-progress emergency (burglary, domestic violence, etc.).
        iii. These labels replace numeric priority codes (1/2/3) for clarity.
5. **Handling Spam or Unverified Caller Information**
    a. **Concern:** How to manage cases when random/spam numbers report incidents.
    b. **Resolution:** Spam calls will not be logged; system only tracks legitimate, logged calls.
6. **Priority Level Display in Reports**
    a. **Discussion:**
        i. Dispatch view: Open/Active calls show priority with colors.
        ii. Reports: Priority not displayed; activity code priorities remain.
    b. **Decision:**
        i. Priority colors apply **only in Dispatch (Open/Passed Calls)**.
        ii. Reports will continue to reflect activity code highlights (yellow for property, etc.), not dynamic priority colors.
7. **UI & Color Implementation**
    a. **Current:** Test code pushed to staging shows incorrect order & placements.
    b. **Decision:**
        i. Finalize static color scheme for priorities.
        ii. No need for customizable settings (like scheduling).
        iii. Officer view: Open calls will display colors; Reports remain unaffected.
8. **Reports & Forms Integration Scenarios**
    a. **Scenario 1:**
        i. Provide a dropdown in Reports → option to create either a **General Report** (direct to form) or select specific forms.
    b. **Scenario 2:**
        i. When a call is created and officers are assigned, the **primary officer** should be able to create reports/forms linked to that call.

c. **Scenario 3:**
    i. Clarification requested on **who is primary**.
    ii. **Decision:** Arrival time determines primary officer (not selection order). First officer on scene = primary.
    iii. Other officers can file **supplemental/additional reports**.

9. **Multiple Activity Codes & Forms**
    a. Calls may escalate or downgrade (e.g., trespassing → robbery → murder, or robbery → disturbance of peace).
    b. The system must support **multiple activity codes** per call to capture evolution.
    c. Highest charge (e.g., murder) becomes the **primary code**; other codes provide context.

10. **Forms Linked to Activity Codes**
    a. **Proposal:** Each activity code can have forms mapped (e.g., "Murder" requires Incident Report).
    b. **Clarification:**
        i. When an officer selects an activity code, a **pop-up note/link** should appear: *"This requires an Incident Report – click to open form."*
        ii. **Forms are NOT mandatory.** The officer may bypass and continue with report entry.
        iii. Works similar to adding photos (optional, not blocking).

11. **Dispatcher Permissions:**
    a. **Discussion:** Should dispatchers be able to complete incident reports on behalf of officers?
    b. **Decision:**
        i. Dispatchers may log reports but **should not complete incident reports** on behalf of officers due to complexity and accuracy requirements.
        ii. If an incident report is required, the dispatcher must notify the officer to complete it.
        iii. Dispatcher log entry may include note: *"Incident report pending from officer."*

12. **Call Dropdown in Forms:**
    a. Officers need a dropdown of assigned calls when filling forms.
    b. **Concerns:** Dropdown may get cluttered with too many calls (100+).
    c. **Decision:**
        i. Dropdown will only show **open calls assigned to that officer**.
        ii. Once a report is completed for a call, that call number **disappears** from the dropdown for that officer.
        iii. If multiple officers are assigned, each officer's dropdown updates independently after they complete their report.

13. **Flexibility in Forms**
    a. Officers should be able to:
        i. Use suggested form (from activity code mapping).
        ii. OR select additional forms manually from dropdown.
    b. Ensures adaptability for varying incident complexities.

14. **Edge Case Handling**
    a. Example: Multiple officers arrest different suspects in the same robbery.
        i. The lead/primary officer writes the main incident report.

    ii. Supporting officers write supplemental reports & arrest-specific documentation.
  b. The system should not block officers from writing incident reports even if they're not primary, to allow flexibility for rare/complex cases.

15. **Callouts in Scheduling**
  a. **Discussion:**
    i. Query raised on whether **callout stats** (counts) should be included in scheduling summary.
    ii. Hours are not reliable (can be manually filled), but **counts** provide better visibility.
  b. **Decision:**
    i. Show **callout count**, not hours.

16. **Holiday Hours in Contracted vs Operating Hours**
  a. **Clarification:**
    i. Contracted hours = baseline requirement.
    ii. Operating hours = scheduled hours.
    iii. Holidays reduce operating hours but are tracked separately.
  b. **Formula Confirmed:**
    i. Contracted Hours ≈ Operating Hours
    ii. Where Operating Hours = Staffed + Open + Unscheduled + Overtime + Double Time + Extra Coverage + Holiday.
  c. **UI Suggestion:**
    i. Show contracted and operating hours on **top line (highlighted)**.
    ii. Subcategories (staffed, open, overtime, holiday, etc.) listed below.
    iii. Add **hover-over tooltips** or descriptions to clarify formulas.
  d. **Decision:**
    i. Proceed with these changes now; add tooltips/descriptions in the upcoming build.

17. **Geofencing in Calls**
  a. **Status:**
    i. Feature to be implemented **later** after the geofencing system is updated (drawing geofence per site).
    ii. Current ticket pushed to **bottom of backlog**.

18. **Primary vs Backup Units in Calls**
  a. **Requirement:**
    i. Ability to mark officers as **Primary (P)** or **Backup (B)** when assigning to a call.
    ii. Selection needed for **seniority/qualification reasons**, not just arrival order.
  b. **UI Suggestion:**
    i. Two radio buttons or checkboxes (P and B).
    ii. Default all to Backup; manually select Primary.
  c. **Decision:**
    i. Feature approved, but internal discussion needed before finalizing.

19. **Multiple Activity Codes per Call**
  a. **Requirement:**
    i. Calls may involve **multiple activity codes** (e.g., disturbance + intoxicated + weapon).
    ii. Primary = main code (used for report template population).

        iii. Secondary codes = visible internally in call details but **not used for report templates**.
    b. **Decision:**
        i. Reports → only primary code.
        ii. Calls view → show all codes (primary + secondary).
        iii. PDFs for managers → only primary code.

20. Dispatcher Edit Permissions
- **a. Issue:**
    - i. Once a call is marked as cleared, there's no way to update if entry was wrong.
- **b. Decision:**
    - i. Add an option for **dispatchers only** (not officers) to edit call time entries.

21. Bug – Duplicate Reports (Matthew Queen)
- **a. Issue:**
    - i. User **Matthew Queen** is receiving duplicate reports.
    - ii. Attendance logs not visible under his account.
- **b. Action:**
    - i. Jaspreet to check **database records** for this officer specifically to trace the cause.

22. QuickBooks Integration Keys
- **a. Issue:**
    - i. Keys generated were linking to a **new/random QuickBooks account** instead of a sandbox or production instance.
- **b. Action:**
    - i. Jaspreet to check with **Kuldeep** (who has access) and share correct procedure/video.

23. Fleet Management & KPI
- **a. Discussion:**
    - i. KPI items were already clarified in earlier sessions.
    - ii. Fleet Management discussion is pending, but today's call was interrupted by urgent payroll issues.
    - iii. Fleet management scope is limited to **vehicle health monitoring** and possible **future integration with devices/dashcams** via API.
- b. **Status:** Postponed until payroll issue is resolved.

24. Payroll Report Issue (Urgent)
- **a. Problem Identified:**
    - i. Client unable to run payroll because employee rates are missing.
    - ii. Requirement: Payroll report should allow **zero rates but still display hours worked**.
    - iii. Current issue: Payroll report is showing **404 not found** error.
    - iv. Confusion noted between **QuickBooks API for invoicing vs payroll** – client expected one integration but discovered two separate APIs are required.
- **b. Actions & Responses:**
    - i. **Akash (Ditstek):** Fix requires development and testing → will take time.
    - ii. **Jaspreet (Ditstek):**
        1. Committed to implementing a solution by **tomorrow's call**.

2. Will immediately check the **404 error** after the call.
3. Will prioritize a fix so payroll can be run.

c. **Client Concern:**
   i. Payroll is **due today**, client extremely upset as they have been unable to process payroll for two weeks.
   ii. Requested immediate resolution or temporary workaround.

25. Build Release Timing

a. **Discussion:**
   i. Tomorrow's build update needs to be scheduled within a limited testing window.
   ii. Client suggested **6:00 AM (client's local time)** as the best release time due to low system usage.

b. **Decision:**
   i. Build update to be scheduled at **6:00 AM PST time**.
   ii. The Ditstek team will attempt to complete testing within **1–2 hours**.