

## Minutes of Meeting

Date and Time	6 August 2025 09:00 PST	Meeting type	Zoom
Organiser	Mr. Rupesh	Client	Citywide

### Attendees (Internal)

- Kuldeep
- Jaspreet
- Sangita
- Vishesh
- Akash
- Ravinder
- Amit

### Attendees (Client Side )

- Tom, Teresa, Matt, Randy

### Agenda

- **Discussions on the following:**
  - Employee Help and support Demo
  - Report Approval Process Demo
  - Leave Request History Enhancements
  - UI/UX Feedback
  - PTO (Paid Time Off) & Sick Pay (Sick Leave) Feature Requirements
  - Mass Email “Reply-To” Field Issue
  - Mobile App Build Update (TestFlight)
  - Training Module Testing

The following things are discussed:

**1. Employee Help and support Demo:**

**a. Editability of Complaints:**

- i. **Initial Functionality:** Employees could edit submitted complaints.
- ii. **Decision:**
  - 1. **Editing original complaints will be disabled.**
  - 2. **Users can add follow-up comments/notes** post-submission for clarification.
  - 3. Complaints **cannot be deleted.**
  - 4. **Withdrawal of complaint** will be allowed, but it must be recorded. Upon withdrawal:
    - a. The system should log the action.
    - b. A comment can optionally be added by the employee.
    - c. Complaint remains visible as "Withdrawn," not removed from system.

**b. Admin Permissions:**

**i. Admin Role Clarified:**

- 1. Admins can **reassign complaints** or investigations.
- 2. Admins **cannot edit** the original complaint content or submitter's details.

**c. Complaint Filtering and UI Changes**

- i. Current filters (e.g., All Requests, My Requests, Assigned Requests) were reviewed.

**ii. Decision:**

- 1. Filters should remain on the current page.
- 2. Option to **move filters to the sidebar** or position **above table columns** will be explored with the UI designer.
- 3. **Naming Update:** Rename "**Help and Support**" to "**Team Support**" to avoid conflict with the client-facing section.

**d. Complaint Templates / Topics**

- i. The original setup used a "Select Template" dropdown.

**ii. Decision:**

- 1. Change label from "**Select Template**" to "**Subject**".
- 2. Dropdown will serve a dual purpose: choosing complaint type and generating relevant forms.
- 3. If "Other" is selected, a freeform comment box should appear.

**e. Anonymous Complaints**

**i. New Requirement Introduced:**

- 1. Allow users to **submit complaints anonymously**.
- 2. If anonymous:
  - a. The **admin interface must not reveal identity**.
  - b. **Follow-up response will not be possible**; it's a one-time submission.
- 3. Include an explanatory note: "By submitting anonymously, follow-up communication will be disabled."

**ii. Form Field Adjustments**

- 1. **First/Last Name:** Not needed on the complaint form as it's

already associated with the logged-in profile.

**f. Site Information in Complaint Requests:**

i. **Discussion:**

1. Jaspreet asked whether a request/complaint can be associated with a site.
2. Teresa confirmed it is useful but should **not be a required field**.
3. Use cases discussed:
  - a. Complaint against a **property manager** or a **vendor** on site.
  - b. Enables **location-based analytics**.

**g. Template Behavior in Forms**

i. **Current Issue:**

1. "To" and "CC" fields are appearing **after** selecting the template.

ii. **Resolution:**

1. Fields can exist as **empty input placeholders** and populate **dynamically** once a template is selected.
2. This logic is preferred since templates define recipient roles and visibility.

**h. Handling "Other" Template Selection**

i. **Kuldeep's Question:**

1. What happens if "Other" is selected?

ii. **Response:**

1. Users can **manually select** recipients from a dropdown list of **potential managers** when "Other" is chosen.

**i. Manager List Formatting**

i. **Tom's Feedback:**

1. Manager list should include:
  - a. **Rank** (e.g., "Captain William Drake").
  - b. **First Name and Last Name**.
2. **Badge numbers are not necessary.**

ii. **Job Titles Clarification:**

1. Ranks should reflect role hierarchy, e.g., CEO or Chief depending on the organization.
2. For external clients (civilian companies), rank titles should be **customizable**.

**j. Enhancements and Admin View**

i. **Discussion:**

1. Jaspreet asked if any more Employee help and support-related changes were needed.
2. Tom requested to review the **admin side view** when a complaint is submitted:
  - a. How the complaint flows.
  - b. What actions are available to the admin post-submission.
3. Jaspreet to check status and update accordingly (feature still in development).

**k. Site Input on Request Forms**

- i. **Discussion:** Site information can be added optionally in the complaint/request form.
  - ii. **Use Case:** Complaint against property manager or other vendor at a site.
  - iii. **Decision:** Site should not be a mandatory field but useful for analytics.
- I. Template Handling in Forms**
- i. **Issue:** To & CC fields appear only after selecting templates.
  - ii. **Suggestion:** Inputs can be empty until the template is selected.
  - iii. **Decision:** Keep it as-is; templates trigger relevant recipient options.
- m. Email Field Behavior (To/CC)**
- i. **Scenario:** When "Other" is selected in template, users should be able to choose from all potential managers.
  - ii. **Additional Requirement:** Manager names should display rank/title (e.g., Captain William Drake).
  - iii. **Conclusion:** No need for badge numbers—rank, first name, and last name are sufficient.
- n. Notifications**
- i. **Requirement:** Any update to a complaint/request should trigger notifications to all involved parties.
  - ii. **Improvement Needed:** Notifications for new messages in active chats to avoid manual checking.
  - iii. **Suggested Wording Change:** Replace "New request assigned" with "Team support has been assigned to you."
- 2. Report Approval Process Demo**
- a. Report Approval Setting:**
- i. **Decision:**
    1. Add a company-level global setting for report approval.
    2. If selected, all site reports require approval.
    3. Option to override per site remains.
  - ii. **UI Placement:** Checkbox will be added under **HR Configurations** in company settings.
- b. Report Status & Actions**
- i. **Statuses Available:** Submitted, Approved, Rejected, Resubmitted.
  - ii. **Admin View:** Ability to filter and bulk approve/reject reports.
  - iii. **Requirement:**
    1. Provide **Approve/Reject/Edit** options directly from the main report list view.
    2. Avoid extra clicks—enable in-place approval actions.
  - iv. **Officer Flow:** Rejected reports show rejection reason; officer can revise and resubmit.
- c. Report Approval/Reject Functionality**
- i. **Current Capability:** Admin can view, approve, or reject reports.
  - ii. **Enhancement:** Add **approve/reject** buttons inside the **viewer mode** for easier access.
  - iii. **Prompt Requirement:** On rejection, a reason must be entered; this message should be visible to employees.
  - iv. **Approval Path:**
    1. Approved reports are finalized.

2. Rejected reports move to the employee's "**My Reports**" section with a "Rejected" status.

**d. Admin Editing Rights**

- i. **Confirmed:** Admins can **edit** reports even if approval is required.
- ii. **Logging:** All admin edits must be logged for audit purposes with timestamps.

**e. Employee View After Rejection**

- i. **Rejected Report Visibility:** Rejected reports are visible under the employee's "**My Reports**" with a "Rejected" tag.
- ii. **Enhancement Required:**
  1. Always display the **Status** column in the reports list.
  2. Show rejection message, date/time, and the person who rejected.
  3. Add **edit button** within the viewer mode for easier employee access.

**f. Report Resubmission Flow**

- i. **Process:**
  1. Employee views rejection message.
  2. Edits the report using the **Edit** button (preferably in viewer).
  3. After editing, click "**Save and Resubmit**".
- ii. **Clarification:**
  1. Simply editing is **not enough**—must explicitly press **resubmit**.
  2. After resubmission, report status changes to "Resubmitted".
- iii. **Confirmation:** No need for an extra prompt to confirm resubmission—it should be handled by the "**Save and Resubmit**" action.

**g. Admin Handling of Resubmitted Reports**

- i. **Admin View:** Resubmitted reports are flagged for re-approval.
- ii. **Action:** Admin reviews, approves or rejects again. Once approved, it gets included in the final PDF report.

**h. Audit Log / Activity History**

- i. **Enhancement:** Under viewer, show logs with:
  1. Status history (Submitted → Rejected → Resubmitted, etc.)
  2. Messages entered during rejection
  3. Date/time stamps
  4. Responsible person (who rejected/approved)

### 3. Leave Request History Enhancements

**a. Leave Approval History:**

- i. Officers can edit their leave after approval.
- ii. Full history is maintained showing the sequence: applied → approved → updated → re-approved.

**b. Display Requirements:**

- i. Approval/decline status to be shown along with the name of the admin performing the action.
- ii. Additional column to be added for *total days off requested*.
- iii. Fields finalized: Officer Name, Badge Number, From Date, To Date, Total Days, Leave Type, Status (Approved/Declined), Approved/Rejected By, Description.

- c. **Handling Long Leave Messages:**
  - i. Messages submitted by officers as part of leave request will be hidden in the main view.
  - ii. Each leave request row will be clickable (hyperlink) to open full details including the long message.
  - iii. This avoids clutter and maintains a clean UI.
- d. **Historical Trail:**
  - i. Snapshot view will show relevant history events only (e.g., "Leave message updated by Admin Tom").
  - ii. Full detail accessible via drill-down view.

#### **4. UI/UX Feedback**

- a. **Listing and Filters**
  - i. Breadcrumbs, notification icons, and filters to be consolidated at the top for cleaner layout.
  - ii. Filters will be hidden by default and shown on click.
  - iii. New listing view to reduce dead space and improve usability.
  - iv. Teresa raised a concern that the UI appears zoomed-in and cramped — needs adjustment for better visibility (especially on 75% zoom screens).
- b. **Route Separation(open calls/past calls)**
  - i. Proposal: Split “Open Calls” and “Past Calls” into separate sections under a new main menu “Operation Hubs”.
  - ii. Purpose:
    - 1. Improve navigation clarity.
    - 2. Avoid loading all data at once, which delays page load.
  - iii. Clarified by Jaspreet: This change won't impact load time directly but will visually and structurally simplify the UI.
  - iv. Teresa inquired about speed improvement; Jaspreet confirmed backend optimizations are in progress to enhance performance.
- c. **Site Update Performance Issue**
  - i. Major concern raised by **Tom** about the long **delay** in updating a site during live demos.
  - ii. Demonstrated poor response time during site update, causing awkward pauses mid-demo.
  - iii. **Kuldeep** explained:
    - 1. The site module is partly migrated; remaining issues are related to field mapping (e.g., responding agency).
    - 2. Old Laravel-based pages are the root cause of current slowness.
  - iv. **Rupesh's** Input:
    - 1. Emphasized urgency of fixing the slowness.
    - 2. Team instructed to:
      - a. Investigate the performance bottlenecks.
      - b. Prioritize conversion and optimization of the site update page.
      - c. Provide clear timeline for full migration and resolution.

#### **5. PTO (Paid Time Off) & Sick Pay (Sick Leave) Feature Requirements**

- a. **Objective:** To build a system to manage and track PTO and Sick Pay

balances for employees.

**b. Key Requirements:**

- i. PTO and Sick Pay accrual should be based on hours worked (e.g., 1 hour of PTO earned for every 8 hours worked).
- ii. There should be caps on accruals (monthly/yearly), but these limits should be optional (i.e., not mandatory fields).
- iii. The accrued balances should reflect live updates (real-time tracking).
- iv. Employees should be able to:
  1. View their current PTO and Sick Pay balances on their profiles.
  2. Submit requests for time off directly from their profiles.
  3. Withdraw or request usage of the hours accrued.

**v. Approval Workflow:**

1. Approvers with the correct access level will receive a notification for each request.
2. Once approved, the amount should be added automatically to the employee's next payroll.

**c. Settings & Configurations:**

- i. PTO/Sick Pay rules should be configurable at:
  1. **Company Level**
  2. **Branch Level** (to accommodate state-wise labor laws)
  3. **Employment Type Level** (e.g., full-time, part-time, union employees)
- ii. The system should support multiple time-off types (e.g., PTO, Sick Leave, Vacation, Holiday), and naming should be customizable.
- iii. Accrual calculations must map against employee schedules and logged hours.

**6. Mass Email "Reply-To" Field Issue**

- a. **Issue:** Emails were being sent without a "reply-to" address, causing them to default to CommandHub's email address.
- b. **Cause:** The mass email feature did not require a reply-to field, unlike the report emailing system.
- c. **Fixes Implemented:**
  - i. "Reply-To" is now a **mandatory field** for mass emails.
  - ii. If not filled, **email will not be sent**.
  - iii. Email logs are now being managed for mass emails.
- d. **Clarification:**
  - i. **Mass Email "Reply-To" and Company Config Email for Reports** are two separate configurations.
  - ii. "From" email will still originate from the company configuration, but the "Reply-To" will depend on the client's mass email settings.
- e. **Next Steps:**
  - i. Prevent **any email** from being sent if the company email configuration is missing.
  - ii. Ensure all clients' emails originate from their respective accounts, not CommandHub's server.
  - iii. Apply the **same compliance checks** for mass emails as with report emails.
  - iv. Enforce reply-to as a required field across **all client accounts**.

**f. Bug Resolution Timeline**

- i. This email-related issue is one of the **critical bugs** to be completed **by Saturday**.
- ii. Kuldeep confirmed the bug has already been fixed.
- iii. Final build release will include this fix and will be shared for QA/testing.

**7. Mobile App Build Update (TestFlight)**

- a. A new build (v36) is available for testing on TestFlight.
- b. Teresa confirmed receipt of version 35; team clarified she needs to install **version 36**.
- c. Release email with **release notes** to be sent by Jaspreet.
- d. Build includes:
  - i. Updated forms and reports
  - ii. Red mode
- e. Planned Delivery:
  - i. Final mobile build targeted for **10th August (morning)** to align with the client's launch schedule.
  - ii. Alternate delivery by **late night on 9th August** if required.

**8. Training Module Testing**

- a. **Pending Update from:** Randy Nunez
- b. Randy confirmed he will complete testing today.
- c. The previous delay was due to Wi-Fi issues while moving.

