

Minutes of Meeting

Date and Time	06 November 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:**
 - Discussion on Analytics Design Changes;
 - Discussion on Labor Law Settings and Overtime Logic
 - Onboarding Flow Testing and Issues Identified
 - Upcoming Sprint Implementation
 - Scheduler Enhancements for Admin and Dispatch
 - Sprint Prioritization & Upcoming Tasks
 - Backend Admin Panel & Pending Items
 - Bulk Update Functionality
 - Build Deployment Confirmation

The following things are discussed:

1. Discussion on Analytics Design Changes;

- a. **Presented by:** Jaspreet Kaur
- b. Updated **Analytics UI** to show:
 - i. Current value
 - ii. Previous value
 - iii. Difference
 - iv. Percentage change
- c. Design consistency across all graphs for clarity and performance.
- d. Handling datasets with >10 records: confirmed only key data to be displayed.
- e. **Filter Enhancements:**
 - i. Weekly, Bi-weekly, and Quarterly filters added.
 - ii. Weekly & Bi-weekly filters select one reference date → auto-calculates range.
 - iii. The quarterly filter allows selecting Q1–Q4 per year.
- f. Tom confirmed the design changes and agreed with proceeding to final implementation.
- g. Pending addition of “**Total Balance**,” “**Paid**,” and “**Pass-through Amount**” in next phase (API-level update pending).
- h. **Decision:**
 - i. Analytics design finalized with proposed filter logic and visual changes.
 - ii. API enhancement for billing summary to be included in **next phase**.

2. Discussion on Labor Law Settings and Overtime Logic

- a. **Topic:** Implementation of consecutive days & weekly overtime rules.
- b. **Discussion Points:**
 - i. Consecutive shifts logic to trigger overtime after 4 consecutive days of work in a week.
 - ii. The work week is considered **Monday–Sunday**.
 - iii. Overtime (OT) and double-time (DT) rules to work **independently** unless configured together.
 - iv. If “Double Time after 60 hours/week” is set, system will calculate DT beyond that threshold.
 - v. The rules must **interact but not overlap** (avoid double counting both daily & weekly triggers simultaneously).
 - vi. CommandHub clarified OT rules should reset each week.
- c. **Decision:**
 - i. Adopt **weekly reset logic** (Monday–Sunday).
 - ii. System to support flexible OT/DT combinations as per configuration.
 - iii. Document to be updated confirming agreed rule structure.

3. Onboarding Flow Testing and Issues Identified

- a. **Reported by:** Ravinder Singh
- b. Completed testing for new instance onboarding.
- c. Observed:
 - i. Missing configuration dependencies (e.g., activity codes, service types, assignment templates).
 - ii. Branch switching issues — incorrect or duplicate branch listings.

- iii. Visibility issues between Organizer and Admin roles.
- d. Created a **Branch-Level Testing Checklist** identifying all issues and working components.
- e. Shared report internally; developer alignment planned by tomorrow.
- f. **Decision:**
 - i. One developer to be assigned for **branch switching issue** fixes by **tomorrow**.
 - ii. Checklist to be shared with CommandHub for visibility.
- g. **Proposed Improvements to Instance Setup Workflow**
 - i. **Proposal A (by Jaspreet):**
 1. During first login, show a **setup completion screen** (similar to LinkedIn profile setup progress).
 2. Display all required setup items (Activity Codes, Services, Templates, etc.) on one page.
 3. System allows saving all configurations in one go before first use.
 - ii. **Proposal B (by Tom):**
 1. Include **default “Example” entries** (employee, client, activity code, etc.) in every new instance for guidance and testing.
 - iii. **Decision:**
 1. Combine both approaches:
 - a. Guided setup screen for mandatory configurations.
 - b. Default example data for reference and initial functionality.
 - i. Implemented in **next sprint cycle**.
- h. **Development Plan and Timelines**
 - i. **Discussion:**
 1. Flow change implementation to be handled post current sprint.
 2. Current sprint work already completed; next sprint starts **10th November**.
 3. Next build planned by **20th November** with:
 - a. Branch issue fixes
 - b. Onboarding flow adjustments
 - c. Partial implementation of guided setup
 4. Tom emphasized the need for **clear and direct timelines**.
 - i. **Instance Availability & Onboarding Time**
 - i. Currently, **5 ready-to-use trial instances** are available for new client onboarding.
 - ii. For a **new instance setup**:
 1. 4 days if building from scratch.
 2. 2 days if using pre-tested existing trial instances (after domain & configuration update).
 - iii. Tom stressed the importance of having a fixed onboarding SLA.
 - iv. **Decision:**
 1. **Standard Onboarding Timeline:**
 - a. 2 Days → Using ready instances
 - b. 4 Days → For new instance setup
 - c. QA verification mandatory before handover to client.

4. Upcoming Sprint Implementation

- a. Jaspreet shared the **tentative list of items** planned for the next sprint starting Monday:
 - i. **Admin Panel Phase 2** – continuation of previous sprint.
 - ii. **Analytics (Enhanced Version)** – includes ATS, Training, KPI dashboards integrated into the main analytics module.
 - iii. **Primary vs Backup Units in Calls** – enhancement for call handling.
 - iv. **Primary and Secondary Activity Codes** – addition within call records.
 - v. **System Enhancements for Instance Onboarding** – checklist to be shared by Ravinder.
 - vi. **Admin and Dispatch Service in Site Module** – new scheduling component.
- b. Feedback and approval awaited for **P2 and PSL** before including them in the sprint.

5. Scheduler Enhancements for Admin and Dispatch

- a. Tom confirmed the need for a **new service type “Admin”** within the scheduler, similar to *Stationary* and *Mobile*.
- b. The new **Admin selector** should appear on the scheduler and site notes screens, linked with the **service type**.
- c. Functionality of the Admin site will **mirror Stationary** (same scheduling behavior).
- d. Admin and Dispatch roles need to be visible in scheduling with appropriate permission mapping.
- e. **Role-based Access and Site Assignment Logic**
 - i. **Field Officers** → Identified by *Change Site Permission*.
 - ii. **Dispatch Officers** → Identified by *Status Tab Permission*.
 - iii. **Admin Users** → Identified by access to *Company Settings* and *Employee Management*.
 - iv. Jaspreet highlighted that assigning admins to sites requires workflow changes in employee role handling.
 - v. Tom clarified that:
 - 1. The **Admin service type** should represent *company-level admin* (not site-specific).
 - 2. Admins may be assigned to a *default “Office” site* that is **non-billable**.
 - 3. Hours logged under “Office” sites are for *operational tracking only* and not billed to clients.

f. Dispatch Scheduling & Permission Handling

- i. CommandHub raised concerns on adding **dispatchers** to schedules:
 - 1. Current logic blocks them since dispatchers have higher-level permissions.
 - 2. They can't be assigned as *Stationary* or *Patrol Officers* due to permission restrictions.
- ii. The dev team proposed:
 - 1. A **global-level permission override** for dispatchers and admins, allowing them to appear in all site schedules.
 - 2. Dispatch and Admin personnel can be given **universal scheduler visibility** without explicit site assignment.

g. Workaround for Current Scheduling Limitation

- i. Tom proposed a **temporary solution**:
 - 1. Create a **non-billable “Office” site** in each branch.
 - 2. Schedule dispatchers/admins under this site for shift tracking and payroll purposes.
 - 3. Add a **checkbox “Non-Billable”** in the site configuration.
 - 4. This ensures these shifts don’t count toward contracted/billable hours.
- ii. Admins/Dispatchers can:
 - 1. Log in as **Field Agent** to check in/out.
 - 2. Switch to **Admin access** for operational tasks.
 - 3. This dual-role approach allows check-in tracking and scheduling visibility.

h. Implementation Notes

- i. Teresa suggested making **billing type optional** – if left blank, the site is treated as non-billable.
- ii. Tom emphasized:
 - 1. Each **branch should have one “Office” site** marked as non-billable.
 - 2. Any shifts under that site should automatically exclude from contracted hours.
- iii. Kuldeep added that instead of creating multiple service types, a **single checkbox (“Admin Site”)** would suffice for identification.
- iv. Jaspreet suggested adding **Admin** as a third service type alongside Stationary and Mobile:
 - 1. Admin coverages would not count toward available or billable hours.
 - 2. The UI will reflect this distinction in the scheduler.

i. Decisions Made

- i. **A new service type: “Admin”** will be added in the scheduler.
- ii. **Non-billable flag (checkbox)** to be implemented in site creation for office/admin sites.
- iii. **One default “Office” site per branch**, to track admin/dispatch shifts.
- iv. **Dispatchers and Admins** to have **global scheduling access** (not site-specific).
- v. **Temporary workaround** (dual-role login) approved until final workflow is developed.
- vi. Billing logic:
 - 1. *Blank billing type → Non-billable*
 - 2. *Defined billing type → Billable*

j. Site and Admin Setup Discussion

- i. **Discussion:**
 - 1. The “Admin” type of site will function the same as other service sites but will not be billable.
 - 2. Both parties agreed this setup aligns with the original intention.
- ii. **Outcome:**
 - 1. Admin sites to remain non-billable while retaining all other functionalities.

k. Permission Level Reassessment

- i. **Topic:** Admin and Field Officer Permissions

1. Discussion

- a. Current permission levels are restricted between “Admin” and “Field Officer.”
- b. A workaround for smoother permission handling will be explored.
- c. Question raised on whether an Admin can access other admin functionalities without switching interfaces.
- d. Tom mentioned interface switching is acceptable given the dispatch workflow involves multiple screens.

2. Decision:

- a. Switching interfaces is acceptable for dispatchers.
- b. The dev team to explore simplifying permission transitions where possible.

l. Dispatch Workflow Clarification

- i. **Topic:** Implementation for Dispatch Coverage

- ii. **Discussion:**

- 1. Dispatchers to be treated as stationary officers for coverage and scheduling.
- 2. When dispatchers clock in via mobile app (as field officers), they will leave their desktop active for dispatch operations.

- iii. **Action:**

- 1. Tanya to create a “Dispatch” site and configure coverage and schedules for dispatchers following this workflow.

m. End Coverage Date for Admin/Dispatch Sites

- i. **Discussion:**

- 1. Organizer queried if end coverage dates are required for admin/dispatch sites.
- 2. Decision made to maintain consistency with other site types by keeping end coverage fields active.
- 3. This ensures continuity and ease of copying or duplicating coverage configurations.

n. Coverage End and Schedule Handling

- i. **Topic:** Managing Coverage End Dates and Scheduler Visibility

- ii. **Discussion:**

- 1. When coverage ends or is canceled, existing schedules were being removed from view.
- 2. Clarified that:
 - a. End date triggers a 7-day grace period before removal from the scheduler.
 - b. Past coverage can still be viewed via “Active/Inactive” filters or archives.
 - c. Deleting records removes them from both active and archive views.

- iii. **Decision:**

- 1. End coverage dates will continue to be used for better historical visibility.
- 2. A new **Active/Inactive filter** to be added to differentiate ongoing and completed coverage.

o. Schedule Sorting Improvements

- i. **Topic:** Sorting and Readability for Coverage and Shifts
 - ii. **Discussion:**
 - 1. Teresa requested sorting improvements to display shifts in order of start times.
 - 2. The current system sorts by creation date (latest first), causing confusion in reading coverage order.
 - 3. Tom emphasized schedules should be sorted chronologically within each site — from earliest to latest shift start time.
 - iii. **Decision:**
 - 1. Sort order within each site to be changed to “Start Shift Time (Earliest to Latest).”
 - iv. **Action:**
 - 1. The dev team updated sort logic accordingly.
- 6. Sprint Prioritization & Upcoming Tasks**
- a. **Topic:** Next Sprint Planning
 - b. **Discussion:**
 - i. The current sprint has 6–7 prioritized tasks; post that, priorities for remaining tickets are pending.
 - ii. Teresa has not yet updated the trailer sheet with upcoming priorities.
 - c. **Action Items:**
 - i. Jaspreet to follow up with Teresa early next week to finalize and update the priority list.
 - ii. Ravinder to coordinate one-on-one if required.
- 7. Backend Admin Panel & Pending Items**
- a. **Discussion:**
 - i. Tom emphasized the need to complete core functionality, bug fixes, and critical feature enhancements before focusing on UI improvements.
 - ii. Once stabilization is done, backend admin module should be finalized.
 - iii. Jaspreet confirmed **two dedicated resources** are working on Admin Panel Phase 2, and development is ongoing.
 - iv. **Action:**
 - 1. The dev team to resend the list of pending items to Tom and Teresa for review.
- 8. Bulk Update Functionality**
- a. **Topic:** Attendance Check-In and Check-Out Logic
 - b. **Issue:**
 - i. Bulk check-ins for multiple past dates cause multiple pop-ups for unclosed shifts when the officer logs in next time.
 - c. **Discussion:**
 - i. Tom clarified it’s logical for the system to prompt users to close past shifts individually since one cannot be at multiple locations simultaneously.
 - ii. Each pop-up ensures the user properly closes all pending shifts.
 - iii. To prevent confusion, system should enforce mandatory closure before new shift starts.
 - d. **Decisions & Actions:**
 - i. Retain the pop-up warnings for each unclosed shift.
 - ii. Add a **mandatory response** (no “X” close option) before the user can proceed.

- iii. Dispatch retains the ability to manually force logouts if required.
- iv. Status tab and dispatch views will reflect these unclosed shifts accurately.

9. Build Deployment Confirmation

a. Discussion:

- i. Jaspreet mentioned that the planned build deployment for today was on hold as there was no confirmation from Teresa's end.
- ii. Tom stated that Teresa might have been preparing for it and requested the dev team to stay on standby for a few minutes.
- iii. Ravinder and Organizer discussed the timing, confirming that this period falls under peak working hours.
- iv. It was mutually agreed that the build update will be rescheduled.

b. Decision:

- i. The **build deployment will be moved to tomorrow** after receiving confirmation from Teresa.
- ii. Team to remain on standby for further instructions from CommandHub.



