Minutes of Meeting

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

Attendees (Internal)
• Kuldeep • Jaspreet • Ravinder • Ajay • Kapil • Akash • Babita • Pankaj
Attendees (Client Side)
• Teresa • Tom • Matt

Agenda

• **Discussions on the following:**
    ○ Lock/Unlock Shift Functionality
    ○ Change of Approach: Move Locking to Attendance/Payroll Section
    ○ Payroll Locking Requirements
    ○ Locking Flexibility Requirements
    ○ Reporting Requirements
    ○ Notifications
    ○ Scheduling – Copy/Paste Shifts
    ○ Availability Tab Enhancements
    ○ New Call Screen – Officer Pre-Selection
    ○ Threshold Settings – Standing & Patrol Officer
    ○ Threshold Type Label (User Tracking Idle Range)
    ○ Beat Settings – Threshold Handling
    ○ Call Module – Duplicate Call Functionality
    ○ KPI Display for Officers vs Admin
    ○ KPI Rule Setup – Allow Selecting Reward, Penalty, or Both
    ○ Rule Types – Positive vs Negative as Separate Rule Types
    ○ ERM Integration – KPI Points Trigger
    ○ KPI Trigger Conditions – Quantity vs Monetary Value

- Targets – Defining Target vs Extras
- KPI Analytics – Graphing Requirements
- Graph Standardization & Chart-Type Selection
- Future Enhancement – User-Selectable Chart Type
- Technical Discussion & Workload Estimation
- KPI Analytics Integration
- PSSP Module – Status Update
- Priority Planning
- Analytics Discussions

The following things are discussed:

1. **Lock/Unlock Shift Functionality:**
    a. **Initial Presentation (Scheduler View)**
        i. Kuldeep showcased the **lock/unlock feature on the scheduler**:
            1. Locked shifts show a **lock icon**.
            2. Locked shifts **cannot be dragged, edited, or deleted**.
            3. Unlocked shifts remain fully editable.
            4. Mass lock/unlock option available via filters.
    b. **Clarification on Open Shifts**
        i. Kuldeep asked whether **open shifts** should also be lockable.
        ii. **Teresa confirmed:** No, locking will only apply to **scheduled shifts**, not open shifts.
2. **Change of Approach: Move Locking to Attendance/Payroll Section**
    a. **Tom's Requirement**
        i. Lock/unlock should **NOT** be done from the scheduler page.
        ii. Locking must be a **high-level admin (corporate)** function, accessible via:
            1. **Attendance** section, or
            2. **Payroll** section
        iii. Corporate will lock the **entire time period** after reconciliation.
        iv. Locking is **not permanent**; an authorized admin must always be able to **unlock for corrections**.
    b. **Final Functional Decision**
        i. Implement **lock/unlock** in:
            1. **Attendance** (daily / weekly / date-range locking)
            2. **Payroll** (period locking)
        ii. Scheduler will **only display lock icons** but will **not control locking**.
3. **Payroll Locking Requirements**
    a. **Hard Requirement: Payroll Must Be Locked Before Running Payroll**
        i. Tom insisted that:
            1. Payroll **should not run** unless all shifts in the selected period are **locked**.
            2. This is standard for large companies.
        ii. **Teresa disagreed**, but Tom overruled: payroll locking will be a **mandatory requirement** before payroll processing.
    b. **Behavior When Viewing Payroll Report**
        i. If shifts for the selected period are **not fully locked**:
            1. The payroll report **should not display any data**.
            2. System must show a **popup/warning**:
                a. "This period is not locked. Please lock payroll hours in Attendance to view payroll report."
        ii. If even one officer's shift is unlocked:
            1. Only that specific user's record should be **hidden**, OR
            2. Preferably (per Tom), **hide the entire payroll report** until fully locked.
    c. **Unlocking and Regeneration**
        i. If admin **unlocks** a shift:

        1. Payroll report should **immediately disappear**.
        2. After corrections are made & shifts are **relocked**, the report should regenerate.

4. **Locking Flexibility Requirements**
    a. **Teresa's Requirements**
        i. The system must support locking:
            1. Daily
            2. Weekly
            3. Custom date range
            4. Full pay-period
    b. **Attendance Page Behavior**
        i. Filters must allow:
            1. Selecting any date range
            2. Applying a **mass lock** for that range
            3. Filter to view **locked** vs **unlocked**
    c. **Scheduler Display**
        i. Scheduler will:
            1. Show lock icons for locked shifts
            2. Allow unlocked shifts to be edited
            3. Locked shifts remain read-only
5. **Reporting Requirements**
    a. **Columns in Timesheets**
        i. The earlier **locked/unlocked** column removed from timesheets needs to be **added back**, so users can see the shift status directly in the report.
    b. **Running Reports from Scheduler**
        i. Even if shifts are locked/unlocked:
            1. Desired behavior: reports must still be runnable, but status should be visible.
        ii. For payroll reports:
            1. Reports cannot run unless **all shifts are locked**.
6. **Notifications**
    a. **Notification Rules**
        i. System will send notifications to authorized admins:
            1. When a payroll period is approaching
            2. To remind them to **lock attendance** before payroll is run
        ii. However:
            1. Locking must happen **on the last day / day of payroll**, not 2 days prior (per Teresa).
7. **Scheduling – Copy/Paste Shifts**
    a. **Discussion**
        i. Clarification requested regarding how shifts behave when copied from one week to another.
        ii. Teresa confirmed:
            1. A copied shift pastes exactly as selected, including the same day, time, and assigned officer.
            2. If Monday–Saturday shifts are copied, they will paste only on the selected day (e.g., Monday → next Monday).
        iii. Repeat Functionality:
            1. User must select sites and date range for "Repeat to Next

Week.”
            2. Pasting should respect the selected days (e.g., selecting two days should paste only for those two days).
    - **b. Outcome / Action**
        - i. Maintain **date-range based paste logic**.
        - ii. Shift pasting should mirror **original selection duration and days**.

8. **Availability Tab Enhancements**
    - **a. Discussion**
        - i. The Availability tab now supports adding notes similar to call notes.
        - ii. Changes based on user actions must be saved as:
            1. “Monday availability disabled”
            2. “Tuesday availability updated”
        - iii. The description will be displayed under the table.
        - iv. Teresa approved the proposed behavior.
    - **b. Outcome / Action**
        - i. Implement save logs for:
            1. On/Off toggle of availability
            2. Time modifications
        - ii. Display notes under the table.
9. **New Call Screen – Officer Pre-Selection**
    - **a. Discussion**
        - i. When a radio call is selected and an officer is chosen, that officer should appear pre-selected for the new call.
        - ii. Users must be able to unselect or assign them as a backup.
    - **b. Outcome / Action**
        - i. Pre-selection logic approved.
        - ii. Allow unselecting or changing the officer role (primary/backup).
10. **Threshold Settings – Standing & Patrol Officer**
    - **a. Discussion**
        - i. Standing officers can have threshold units (miles/feet).
        - ii. Patrol officer thresholds are set within the Beat settings.
        - iii. Clarification: If creating a shift for a patrol officer on a site → threshold defaults to standing threshold.
        - iv. Teresa reiterated earlier decision:
            1. **Unified threshold** (e.g., 200 ft) preferred
            2. No need for separate officer-level thresholds.
        - v. Early and Late check-in settings:
            1. Will only accept values in minutes.
            2. Implementation is ongoing and will be ready in the next few days.
    - **b. Outcome / Action**
        - i. Maintain default global threshold unless overridden by beat settings.
        - ii. Early/Late check-in logic to be completed.
11. **Threshold Type Label (User Tracking Idle Range)**
    - **a. Discussion**
        - i. “Threshold Type” label is unclear; needs more descriptive naming.
        - ii. Proposal:
            1. Add an explanation text (e.g., “Officer will be marked idle if there is no movement within this range.”)

        2. Consider renaming to User Tracking Idle Range or similar.
    b. **Outcome / Action**
        i. Add descriptive helper text.
        ii. Team will finalize a better label name and share on Slack.

12. **Beat Settings – Threshold Handling**
    a. **Discussion**
        i. Threshold settings can be listed under Beats as well.
        ii. Teresa asked whether the global threshold should apply if the beat-level threshold is not defined.
        iii. Team proposed:
            1. Beat-level threshold overrides global.
            2. If beat threshold not added → use global threshold.
    b. **Client Decision**
        i. Teresa prefers keeping the setup as is for now (global settings only).
        ii. No threshold display needed on Beat dashboard as it is internal information.

13. **Call Module – Duplicate Call Functionality**
    a. **Discussion**
        i. Purpose:
            1. Help dispatchers quickly recreate similar past calls without re-entering details.
        ii. Function applicable in:
            1. Past Calls list
            2. Call History popup
            3. New Call Screen
        iii. On duplication, the following should be copied:
            1. Call received source
            2. Site
            3. Activity & Secondary Activity Codes
            4. Call priority
            5. Reporting person details
            6. Demeanor
            7. Call location
            8. Suspect description
            9. Call description
        iv. Assigned officers should NOT be duplicated.
        v. Ravinder suggested auto-populating all details when selecting a record in history.
            1. Not possible due to multiple possible entries per phone number.
            2. Only the selected specific call should be duplicated.
        vi. Teresa suggested (optional, low-priority):
            1. Auto-populate last reporting person based on phone number.
            2. Useful but can be treated as a low-priority enhancement.
    b. **Outcome / Action**
        i. Duplicate Call button to be added in:
            1. Past Calls
            2. Call Details view
            3. Call History popup
        ii. Fields to be duplicated: all call attributes except officer assignment.

    iii. Optional enhancement (lowest priority):
        1. Auto-fill last known reporting-person info for the phone number.

14. **KPI Display for Officers vs Admin**
    a. **Discussion**
        i. Ravinder demonstrated 3 sample shifts with different KPI outcomes:
            1. **Late check-in** → Penalty applied correctly.
            2. **Normal shift with no KPI triggered** → No reward/penalty.
            3. **Positive punctuality KPI** → Reward applied correctly.
        ii. He asked whether KPI results with **no reward/penalty** should appear on an officer-facing view.
    b. **Client Decision**
        i. Teresa confirmed:
            1. **Officers should NOT see KPIs that result in neither reward nor penalty.**
            2. Showing every possible KPI outcome would clutter their view.
            3. Only the KPIs where they **earned** or **lost** points should be visible.
        ii. Administrators, however, **should** see the full history.
    c. **Outcome**
        i. **Officer View:** Show only KPIs with an actual impact (reward/penalty).
        ii. **Admin View:** Show full KPI records, including neutral/no-impact entries.

15. **KPI Rule Setup – Allow Selecting Reward, Penalty, or Both**
    a. **Discussion**
        i. Jaspreet and Ravinder suggested:
            1. Some rule types only need penalty (e.g., late check-in).
            2. Some only need reward (e.g., positive punctuality).
            3. The KPI creation form should allow selecting:
                a. **Reward only**
                b. **Penalty only**
                c. **Reward + Penalty**
        ii. Currently, both fields appear even when not needed.
    b. **Client Response**
        i. Teresa confirmed:
            1. Rules should allow choosing which scoring type applies.
            2. It should be clear based on the rule type.
    c. **Technical Notes**
        i. Pankaj reminded that earlier logic required:
            1. If a rule condition is met → apply penalty.
            2. If rule condition is NOT met → apply reward.
        ii. Team agreed this can still work if both options (reward/penalty) are selectable.
    d. **Outcome**
        i. Add configuration options during KPI rule creation:
            1. **Choose Reward**
            2. **Choose Penalty**
            3. **Choose Both**
        ii. Only selected input fields (reward/penalty) should appear for that rule.

16. **Rule Types – Positive vs Negative as Separate Rule Types**
    a. **Discussion**
        i. Teresa clarified:
            1. Positive and negative KPIs should generally be separate rule types.
            2. Example:
                a. **Negative Late Check-in**
                b. **Positive Punctual**
            3. Each captures a different scenario, not opposite sides of one rule.
        ii. If a rule is positive, only reward applies.
        iii. If negative, only penalty applies.
    b. **Outcome**
        i. Maintain **separate rule types** for positive and negative versions of a behavior.
        ii. Provide independent scoring for each.
17. **ERM Integration – KPI Points Trigger**
    a. **Discussion**
        i. Teresa explained that KPI is directly tied to ERM entries:
            1. ERM entries like call-out, new account, manager compliment trigger KPI scoring.
            2. If an ERM entry is logged, its points automatically reflect on KPI.
    b. **Example**
        i. Negative "Call Out" entry → automatic penalty.
        ii. Positive "New Account" entry → automatic reward.
    c. **Outcome**
        i. Continue mapping KPI rules to ERM entry types.
        ii. Confirm automatic point triggering upon ERM activity.
18. **KPI Trigger Conditions – Quantity vs Monetary Value**
    a. **Discussion**
        i. Tom noted confusion around selecting both **quantity** and **monetary value** for triggering a KPI.
        ii. Suggested:
            1. User should select **only one**, not both.
            2. If quantity is selected, monetary field is disabled.
            3. If monetary value is selected, quantity field is disabled.
    b. **Client Decisions**
        i. Teresa and Tom agreed:
            1. These are not "targets" but "triggers."
            2. However, using the word **Target** is acceptable for positive KPIs.
            3. Negative KPIs are not "targets," so the label should remain "Quantity" or "Value."
    c. **Outcome**
        i. **Allow selection of either Quantity OR Monetary Value (not both).**
        ii. Grey out the unselected field.
        iii. For positive KPIs, allow marking the selected field as a **Target**.
19. **Targets – Defining Target vs Extras**
    a. **Discussion**

        i. Tom emphasized the need for a target field for positive KPIs.
        ii. Teresa clarified:
            1. Some positive KPIs represent **targets** (e.g., 3 highlights).
            2. Some are **extras** (e.g., manager compliments) and should NOT be treated as targets.
    b. **Outcome**
        i. Add a **"Mark as Target"** toggle for positive KPIs.
        ii. Not mandatory.
        iii. Analytics should later show:
            1. Target vs Achieved
            2. Over/Under by count or percentage.

20. **KPI Analytics – Graphing Requirements**
    a. **Desired Analytics Display**
        i. Teresa shared example graphs created by Tanya, emphasizing:
            1. KPIs should display department-wise columns.
            2. Each department's target, average, and passing % should be visible.
            3. Graphs should clearly show department-level trends and changes over time.
            4. Example graphs shown were visually clear and easy to understand.
    b. **Requirement to Replicate Tanya's Styles**
        i. Teresa requested incorporating Tanya-style graphs into the KPI analytics.
        ii. These graphs:
            1. Include numeric values inside the bars.
            2. Do not require hovering to read data.
            3. Provide immediate clarity without interpretation.
        iii. Ravinder confirmed understanding:
            1. "We need to replicate what Tanya showed for KPI as well."

21. **Graph Standardization & Chart-Type Selection**
    a. **Tom's Feedback on Current Graphs:** Tom highlighted several issues with existing analytics visuals:
        i. Inconsistency between chart types across sections.
        ii. Dislike for:
            1. Current donut/hollow pie charts.
            2. Unclear indicators (e.g., missing direction arrows).
            3. Misaligned elements and confusing visuals.
        iii. Users should not have to "learn" how to read the graphs.
        iv. Analytics must be **self-explanatory** and readable at a glance.
    b. **Uniform Graph Requirement (Immediate)**
        i. Tom requested:
            1. Make all analytics **uniformly formatted**.
            2. Preferably use **bar graphs** as the primary display.
            3. Replace unclear charts (donut/pie/forensic-style charts).
    c. **Comma Formatting Requirement**
        i. Tom insisted all numerical values must include comma formatting:
            1. Example:
                a. 1000 → 1,000

        b. 12500 → 12,500
    2. This is needed for readability, especially on small screens.
  ii. **Action:** Update system-wide number formatting.

22. **Future Enhancement – User-Selectable Chart Type**
    a. **User Option to Switch Chart Type**
        i. Tom proposed:
            1. A toggle to switch between:
                a. **Pie chart**
                b. **Bar graph**
                c. **Line/chart view**
        ii. Ravinder rephrased:
            1. Ability to change chart type dynamically.
    b. **Jaspreet's Clarification**
        i. Switching chart types will be included in the **Enhanced Analytics** phase.
        ii. Timelines will be shared once enhancement work begins.
    c. **Tom's Expectation**
        i. For now: implement **one consistent chart style** (bar graph).
        ii. Later: allow toggling between chart types.

23. **Technical Discussion & Workload Estimation**
    a. **Workload Concerns**
        i. Jaspreet raised that changing all graphs now will require time.
        ii. Priority is to **stabilize analytics first**, then improve visuals.
    b. **Tom's Response**
        i. Changing chart components is not a complete rework.
        ii. Reusing existing chart code should reduce the effort.
        iii. Emphasized:
            1. "This is basic functionality. Excel had this 20 years ago."
            2. "I've waited two years for analytics — take another week but get it right."
    c. **Kuldeep's Technical Estimate**
        i. Replacing chart types is:
            1. **20–35% rework**, not full rework.
        ii. Approach
            1. Start replacing charts **tab by tab**.
            2. Prioritize removing irrelevant/unhelpful charts first.
            3. Then implement bar graphs throughout.

24. **KPI Analytics Integration**
    a. **Application to KPI Module**
        i. Ravinder asked if Tanya-style graphs should apply to KPIs as well.
        ii. Teresa confirmed:
            1. Yes, Tanya's visuals should also reflect in **KPI analytics**.

25. **PSSP Module – Status Update**
    a. **Current Week Items:** Jaspreet shared updates:
        i. Issues:
            1. Several reported issues were **training-related**, not actual bugs.
            2. Some issues are already **fixed on production** and require verification.
        ii. Change Requests:

1. Threshold setting:
    a. Logic already shown to Teresa.
    b. Integration with full workflow pending
2. "Received By" column:
    a. Already implemented in production.
3. Auto-attach responding officers in a call:
    a. Implemented in testing.
4. Holding reports until approval:
    a. Under internal discussion (Jaspreet + Kuldeep).
5. Ability to lock approved punches:
    a. Demonstrated and deployed in production.

iii. **Timeline Expectation:**
1. Most updates targeted for completion **within the week**.
2. 1–2 items may roll over to next week.

iv. **Next Steps**
1. Jaspreet will:
    a. Share sprint priority updates tomorrow.
    b. Share PSSP progress updates tomorrow after verifying items.

26. Priority Planning

a. Rupesh's Request

i. The team must:
1. Re-evaluate current workloads.
2. Identify tasks to put on hold to accommodate urgent analytics improvements.
3. Send an email summarizing:
    a. What will be deprioritized,
    b. What will be completed within the sprint,
    c. What shifts in timeline may occur.

b. Jaspreet's Confirmation

i. A detailed priority email will be sent tomorrow.

27. Analytics Discussions

a. Wrong Logic: Analytics using "Created Date" instead of "Current Active Data"

i. Current system logic:
1. When a date range is selected, analytics only show records **created** in that date range.
2. This affects:
    a. Total employees
    b. Sites
    c. Departments
    d. Roles
    e. Payroll
    f. Service revenue
3. Example:
    a. Only 5 employees were shown for November because only 5 *were created* that month.
    b. But actual active employees = 134.

ii. Tom strongly rejected this:

            1. “I need to know how many we have right now. Not what was created.”

b. **Two Sets of Reports Required:** Tom clarified that each metric must have two reports:
    i. **Current Totals (Snapshot at End of Period)**
        1. Example:
            a. Total sites as of Nov 30 = 173
            b. Total sites as of Oct 30 = 169
            c. Total employees as of Nov 30 = X
        2. These values must come from **current status as of the end date**, not from creation date.
    ii. Gained / Lost (Variance Reports)
        1. Example:
            a. Sites gained this month
            b. Employees added / terminated
            c. Department movement
            d. Role assignment changes
        2. Both reports must be available independently.

c. **Date Selection Logic — Clear Clarification from Tom:** Tom clearly explained the required logic:
    i. **When selecting a month (e.g., November):**
        1. “Current” = snapshot at **end of November (Nov 30)**
        2. “Previous” = snapshot at **end of previous month (Oct 30)**
        3. Comparison = difference between these two snapshots.
    ii. **Not Required**
        1. Range-based calculations
        2. Creation-date filters

d. **Department / Role Change History Missing**
    i. For employees:
        1. System does not store structured historical data for:
            a. Role assignment changes
            b. Department changes
            c. Active/inactive status changes
        2. Only ERM logs are stored, not actual historical values.
    ii. Tom emphasized:
        1. “If you don’t have this, the whole analytics will be pointless.”
    iii. Team must design historical tracking for:
        1. Role
        2. Department
        3. Active/inactive status
        4. Promotion/demotion

e. **Tom's Exact Requirements for Analytics**
    i. **For Every Metric (Sites, Employees, Revenue, Calls, Shifts, Payroll):**
        1. **Current Totals (Snapshot):**
            a. As of the selected period’s end date.
        2. **Previous Totals**
            a. As of previous period’s end date.
        3. **Difference**

    a. Numeric difference
    b. Percentage difference
    c. Proper naming labels
4. **Category Breakdown**
    a. Example for employees:
        i. Total employees
        ii. Standing
        iii. Patrol
        iv. Hybrid
        v. Admin
        vi. Account managers
5. **Gains / Losses**
    a. For the selected period:
        i. Sites gained
        ii. Employees added
        iii. Terminations
        iv. Role transitions

f. **Specific Clarifications from Tom**
- i. **Employees**
    1. Count must reflect end-of-month role
    2. Example:
        a. Someone moved from Field to Patrol on Nov 15 →
            i. Oct 30 snapshot: Field
            ii. Nov 30 snapshot: Patrol
- ii. **Sites**
    1. Must include:
        a. Standing
        b. Patrol
        c. Hybrid
    2. Must show active site counts at the end of period.
- iii. **Financial Metrics**
    1. Outstanding invoices → show current outstanding, not created in period.
- iv. **Payroll / Shifts / Beat Reports**
    1. Should follow same "current period snapshot + comparison" formatting.
    2. Custom filter should preserve format.

g. **Decisions Taken**
- i. Analytics logic must be redesigned to use **snapshot-based data**, not creation dates.
- ii. Two separate report types will be implemented:
    1. Current totals
    2. Gained/lost
- iii. Historical role/department tracking is required for accurate employee analytics.
- iv. Tom will provide inputs per graph for feasibility assessment.
- v. Accounting team meeting postponed to next week.