Minutes of Meeting

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

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

Agenda
• **Discussions on the following:** ○ Email Issues – SendGrid & SMTP Setup ○ Analytics ○ Help & Support Demo ○ Next Steps & Scheduling

The following things are discussed:

1. **Email Issues – SendGrid & SMTP Setup**
    a. **Issue Summary:**
        i. The SendGrid account was compromised (unauthorized login from New Zealand), leading to deactivation.
        ii. Account reactivated after a formal review/report.
        iii. Temporary switch to SMTP/email server attempted, but verification failed repeatedly.

b. **Credential Issue:**
    i. SMTP credentials (not the same as login credentials) seem incorrect; causing authentication failures.
    ii. Jaspreet/Organizer demonstrated failure with provided credentials during a prior call with Teresa.
c. **Client Impact:**
    i. Reports not being emailed since the 16th of the month.
    ii. Dispatch has been manually sending reports.
    iii. Clients are increasingly frustrated due to inconsistent or missing report deliveries.
    iv. No internal system currently flags failed email deliveries.
d. **Action Items:**
    i. Organizer to reconnect with Aryan post-call to resolve SendGrid credential access.
    ii. System improvement needed: log-based email success/failure tracking.
    iii. Urgent resolution required today (as instructed by Tom).

2. **Analytics**
    a. **Incident Heat Map and Priority Visualization**
        i. **Presentation:**
            1. New incident heatmap introduced with incident descriptions and counts categorized by priority.
            2. Hover and tooltip functionality explained, showing sample incident data.
        ii. **Feedback & Required Changes:**
            1. All data points must be clickable (not just hover-based).
            2. Analytics should link to drill-down listing views at the final development stage.
            3. Current priority categories (very high, high, medium, low, normal) don't match existing system setup (which includes only none, medium, and high).
            4. Teresa requested proper alignment of 10-code/activity code priority with a defined checklist during setup to prevent misclassification.
            5. Tom stressed redesign:
                a. Highest priority should appear at the top (inverted from current design).
                b. Graphs must match actual system-defined priority categories.
                c. Option to exclude specific codes (e.g., 1153 – security check) from analytics.
            6. The purpose of analytics must be understood – not just data visualization, but enabling action and insight.
    b. **Beat Revenue – Graphical & Listing View**
        i. **Presentation:**
            1. Two views showcased:
                a. Graph view comparing current vs. previous periods.
                b. Listing view with hits, site count, and revenue data.
            2. Color coding and axes explained (beat name vs. revenue).

ii. **Feedback:**
    1. Add dollar ($) signs to monetary values.
    2. Tooltips should clearly show hits, site counts, and revenue for current and previous months.
    3. Clarification needed on billing logic:
        a. Whether it's per hit or flat monthly rate.
        b. Total monthly revenue must be calculated accordingly.
        c. Daily, per-hit, and monthly figures to be included (as per earlier data sheet).
    4. Remove previous period data from listing to avoid clutter.
    5. Teresa emphasized: only **monthly total** needed, not monthly hits, if it's flat-rate billing.

c. **Beat-Based Analytics Requirements**

i. **Display Preference:**
    1. Each entry should show the **site number and site name**, as some clients do not use site numbers meaningfully.
    2. Columns required: **Site Number, Site Name, Daily Hits, Price per Hit, Daily Rate, Monthly Rate**.

ii. **Graph & Total Summary:**
    1. The **total revenue info** is missing and must be clearly represented.
    2. Add a new **tab or section** showing **total values**, not just graph-based visuals.

d. **Revenue Calculation Logic**

i. **Monthly Rate Calculation:**
    1. Monthly = Daily Rate × 30
    2. If based on **weekly data**, multiply by **4.285**
    3. For **custom date ranges**, multiply by number of days selected.

ii. **Clarification:**
    1. If a site appears in multiple beats (e.g., different shifts), it's valid as beats are shift-based.
    2. Shift codes:
        a. 1xxx – Day
        b. 2xxx – Night
        c. 3xxx – Swing

e. **Reporting Accuracy and Simplicity**

i. **Feedback:**
    1. Avoid over-complicating the visuals. Simple, **clear tables with precise numbers** are preferred over decorative graphs.
    2. All required info (daily hits, pricing, totals, budget comparisons) should be **instantly visible**.

ii. **Data Accuracy:**
    1. The system should **not duplicate revenue** for the same site unless it's justified by different shifts.

f. **Averages and Budgeting Insight**

i. **Required Metrics:**
    1. Average price per hit

        2. Average number of hits per beat
        3. Total revenue per beat vs. Budget
    ii. **Implementation Plan:**
        1. Add a separate **"Summary Tab"** with aggregated totals and averages.
        2. Include input field for **target budget amount** (e.g., $20,000).
        3. The system should calculate **+/- deviation** from the budget per beat and in total.
g. **Download/Export Options**
    i. **Current Options:** SVG, PNG, CSV
    ii. **Required Additions:**
        1. Add **PDF export** of the visual as displayed on the screen.
        2. Options to:
            a. **Download the full analytics page**.
            b. **Download individual sections** using checkboxes or buttons beside each section.
    iii. **Expectation:**
        1. Printed/exported output must **match the on-screen visual layout exactly**, including any **hover-over data** where applicable.
h. **Label and UI Fixes**
    i. **Rename Labels:**
        1. Rename confusing terms like **"Service-wise Site Comparison"** to **"Service Type-based Site Distribution"** or similar.
        2. All labels should be clear and accurately reflect the content/data shown.
i. **Print Button Enhancement:**
    i. A new **"Print" action button** will be added to allow downloading the complete analytics page.
    ii. Section naming must be reviewed and corrected for clarity.

3. **Help & Support Demo**
    a. A new **template system** was demonstrated under the Help & Support section.
    b. Forms will include:
        i. Template name
        ii. Department selection
        iii. Associated people and supervisor (to be updated to "Decision Maker / Investigator")
        iv. Status and description
        v. Drag-and-drop dynamic form fields
    c. **Form Categories Clarification**
        i. **Activity and assignment templates** should remain in their existing sections.
        ii. Help & Support forms (e.g., HR forms) should be managed **separately**, potentially categorized as **HR templates** or **Operations templates**.
    d. **Employee Request Submission**
        i. Employees can submit Help & Support requests similar to clients.

ii. Fields include: Subject, Message, Template Selection, Custom Fields (e.g., incident description and date).
iii. Templates dynamically update based on selection.

e. **Preloaded & Custom Templates**
   i. CommandHub should support:
      1. **Predefined templates** (e.g., harassment form, pay request form).
      2. **Custom templates** built by clients.
      3. **CSV upload** for bulk template creation (sample format to be shared).

f. **Form Assignment & Visibility**
   i. Department-based form assignment requires improvement:
      1. **Multi-department selection** with checkboxes and "Select All" option.
      2. **Department head** identification to be included.
   ii. Supervisors should be replaced with **"Decision Maker / Investigator"** roles for assignment logic.
   iii. Submitted requests will be visible to:
      1. Assigned decision makers
      2. **Super Admin** (mandatory visibility)
   iv. Forms can be mapped to specific **admins based on access level**.

g. **Access Control & Approvals**
   i. Forms should allow assigning **approval access** to specific admins.
   ii. Example: Admin responsible for handling **pay raise approvals**.

4. **Next Steps & Scheduling**
   a. **Upcoming meeting schedule changes:**
      i. Regular Wednesday meetings remain.
      ii. Thursday's meeting might be moved to Tuesday due to travel.
      iii. For the week of **6th–8th**, meetings likely on **Monday or Tuesday**.
   b. **Tomorrow's agenda:**
      i. Continue with **training module discussion**.
      ii. Include **fleet management** overview with Teresa present.