Minutes of Meeting

Date and Time	31 July 2025 09:00 PST	Meeting type	Zoom
Organiser	Mr. Rupesh	**Client**	Citywide

Attendees (Internal)
• Kuldeep • Jaspreet • Sangita • Vishesh • Akash • Ravinder
Attendees (Client Side)
• Tom, Teresa, Matt

Agenda
• **Discussions on the following:** ○ Fleet Management Discussions ○ Shift Call-Out Feature Enhancements ○ Inventory Management – Uniforms & Equipment ○ TEN Codes Upload ○ Violations Data ○ Training Module Changes Demo ○ Future Enhancement – Email Logs ○ Meeting Schedule Update

The following things are discussed:

1. **Fleet Management Discussions:**
   a. **Fleet Management Structure:**
      i. A new **“Fleet Management” module** will be created with three key subcategories:
         1. **Inventory:** Stores vehicle details including purchase date, initial cost, depreciation schedule, and current value.
         2. **Usage History:** Tracks metrics such as mileage.
         3. **Service History:** Logs maintenance events, parts replaced, service dates, and costs.
   b. **Depreciation Methodology:**
      i. **Two depreciation methods** must be supported:
         1. **Straight-Line**
         2. **Declining Balance**
      ii. Users (fleet managers) should be able to input:
         1. Purchase value
         2. Financing structure (loan duration, interest rates)
         3. Whether full depreciation is taken in the first year (accelerated write-off) or spread over multiple years.
      iii. **Tom emphasized** that most business vehicles are financed, and this should reflect in the system.
      iv. **Depreciation selection** should be manual per vehicle (i.e., user chooses the depreciation method during data entry).
      v. **IRS considerations** and practical tax write-offs were discussed as major decision-making factors for depreciation.
   c. **Depreciation Decision Triggers:**
      i. The system must:
         1. Calculate current vehicle value based on depreciation and KBB API inputs.
         2. Flag vehicles for replacement when current value ≤ 10% of original investment **AND** projected maintenance cost exceeds/equates current value.
         3. Base replacement recommendations on real-world scenarios such as remaining warranty, mileage, and estimated future repair costs.
   d. **Salvage Value Estimation:**
      i. The original plan to classify vehicles into **light**, **moderate**, and **heavy use** was **deemed unnecessary**.
      ii. Instead, salvage value and vehicle condition should be **sourced via KBB APIs**.
         1. Avoid manual error-prone assumptions.
         2. Use actual vehicle data (make, model, year, mileage, condition) to get realistic values.
   e. **KBB API Integration:**
      i. The system will integrate **KBB APIs** to:
         1. Retrieve real-time vehicle valuation.
         2. Eliminate the need for manually calculated salvage values.

        3. Compare retrieved value with depreciated value and maintenance forecast.

   f. **Repair & Service Tracking:**
      i. The system must maintain a **detailed service log**, including:
         1. Type of repair/maintenance
         2. Parts replaced
         3. Associated cost
         4. **Payment source** (Covered under **warranty** or paid **out-of-pocket**)
      ii. This distinction is important for analyzing future costs post-warranty expiry.
      iii. Cost tracking data will be used for future **maintenance projections** once warranty lapses.
   g. **Analytics & Reporting:**
      i. Include analytics to:
         1. Monitor total vehicle cost of ownership.
         2. Forecast future costs.
            Assist in informed decision-making for vehicle retention or replacement.
      ii. Provide clear metrics for vehicles past warranty, based on service history and KBB value.
   h. **Analytics & Cost Reporting**
      i. The analytics module will provide:
         1. Cost trends
         2. Cost per mile
         3. Moderate cost comparisons
         4. Inventory system insights
         5. Fuel usage analytics (currently being calculated via officer login/logout data)
      ii. No additional items needed currently; the team can proceed with implementation.
   i. **Vehicle Self-Diagnostics (Future R&D):**
      i. Idea discussed: Live, self-diagnosing vehicle system.
         1. The concept includes hardware integration in vehicles to detect issues (e.g., check engine lights) and communicate with the software.
         2. System would identify faults automatically without needing to visit a mechanic.
      ii. Jaspreet will explore this further with Aryan, who proposed the idea.
      iii. Suggestion to invite Aryan to next week's call for deeper discussion.
2. **Shift Call-Out Feature Enhancements:**
   a. New feature to manage call-outs from scheduled shifts.
   b. Requirements:
      i. Right-click on a scheduled shift to mark it as a call-out.
      ii. Mark call-out type: **Excused** or **Unexcused**.
      iii. Capture reason (e.g., medical, no reason).
      iv. Excused = General Entry; Unexcused = Negative Entry in CRM.
      v. Once marked as call-out, shift becomes a **fresh open shift** for bidding.

c. Future Addition:
   i. Rule in company settings to define **“excessive call-outs”** (e.g., X call-outs in Y days).
   ii. Teresa will raise a ticket for the rule setup.
d. Call-outs can be:
   i. For assigned but not yet started shifts.
   ii. For already started shifts (force check-out required and new shift creation for the remaining time).

3. **Inventory Management – Uniforms & Equipment**
   a. The system will track all issued inventory to employees.
   b. Inventory Types: Uniforms, Equipment, and other assignable items.
   c. Key Features:
      i. Centralized inventory control in company settings.
      ii. Record assignment of inventory to employees during profile creation.
      iii. Real-time deduction from inventory upon issue.
      iv. Alerts when inventory reaches a predefined threshold.
      v. A new section in employee profiles: **"Issued Uniform/Equipment"**.
      vi. Track quantity, issue history, unit value, and total value of items.
   d. Return Process:
      i. At termination (resignation/firing), items are to be returned.
      ii. Upon return, items are either:
         1. Marked as **Reusable** → Added back to available inventory.
         2. Marked as **Unusable** → Removed permanently from inventory.
      iii. This will maintain a running total of issued, available, and expended inventory.
      iv. Instantly view what items are issued, in hand, and available.
      v. Differentiate between expendable (e.g., uniform) vs. reusable (e.g., taser) inventory.
      vi. Maintain control over item accountability.
   e. Implementation Notes:
      i. The inventory tracking module is part of **future features** and will be prioritized after core functionalities are completed.
      ii. The idea originated from a demo session and is currently in discussion phase only.
4. **TEN Codes Upload**
   a. **Objective:** Upload TEN codes for a specific client instance.
   b. **Clarification:** Teresa confirmed that **California TEN codes** (specifically from **CityWise Public Safety – CWPS**) are to be uploaded.
   c. Randy suggested referencing the **employee handbook** which contains the code tables, if needed.
   d. Jaspreet confirmed the existing codes include identifiers such as **CWPS123**.
   e. Teresa plans to **delete custom/test codes** that were manually created earlier for CWPS.
5. **Violations Data**
   a. Jaspreet inquired whether the **violations list** also needs to be aligned with CWPS codes.
   b. Teresa confirmed: **Yes**, CWPS-related violations should also be included in the same instance.

6. **Training Module Changes Demo**
    a. **Assessment Status Filter Update**
        i. **Filter Enhancement:** Assessment filter updated from “Assessment Result” to **“Assessment Status.”**
        ii. Default filter set to **“Attempted”**; additional status includes **“Assigned.”**
        iii. Pending courses remain in “Assigned” status until attempted.
    b. **Action Column Clarification**
        i. Randy raised concern about the **empty "Actions" column**.
        ii. Action buttons (e.g., reassign, evaluate) only appear after clicking **"View Detail"**.
        iii. Decision:
            1. Either remove the “Actions” column if redundant,
            2. Or add **action icons (e.g., eye icon)** directly in the table for quick access.
        iv. Sangita clarified:
            1. The eye icon under the assessment **section** shows assessment.
            2. Eye icon under **course section** shows course details.
        v. Final decision: **Remove "Actions" column** for clarity.
    c. **Basic Course Information Updates**
        i. Fields updated based on Trello inputs by Teresa:
            1. **Course Duration** in hours/days.
            2. **Assignment Duration** in hours only.
            3. **Completion Deadline** derived from assigned date + duration logic.
        ii. Modules are calculated as 1 hour each by default.
        iii. Randy confirmed flexibility to **override durations**.
    d. **Course Expiry & Scheduling Logic**
        i. Officers **cannot be scheduled** if their course is not completed by the assigned **deadline**.
        ii. Expiry is calculated **per officer** based on assigned date + course duration.
        iii. Not a fixed (global) deadline for all.
        iv. Clarified that expired status prevents scheduling **until marked as passed**.
    e. **Course Progress Bar**
        i. Progress bar implemented to reflect **module completion percentage**.
    f. **Course Duplication and Transfer**
        i. Two new icons introduced:
            1. **Duplicate Course** – creates "copy 1," "copy 2," etc.
            2. **Transfer to Branch** – allows course transfer.
        ii. Courses duplicated are saved in **draft** status until published.
        iii. Reference numbers will help track duplicates.
    g. **Testing and Deployment**
        i. Randy and Teresa to test the final training module changes on **staging**.
        ii. Jaspreet emphasized this testing is crucial before **production deployment**.
        iii. Teresa will provide the **staging link**.

    iv. Randy committed to testing **today or by tomorrow latest**.

h. **Column Selection Functionality**
    i. Some columns (e.g., Branch Name, Modules, Assignment Duration, Updated At) are now optional and can be toggled via the Columns dropdown.
    ii. Earlier, all columns were displayed by default with no customization.
    iii. **Randy's Concern:**
        1. On his screen, column customization options appear limited.
        2. Especially for the "Calls" section, he's unable to remove certain columns like "Standing Site Coverage," which he feels are not relevant in all cases.
    iv. Kuldeep clarified that Randy might be reviewing the staging environment, and suggested rechecking on production for differences in experience.

i. **Layout Feedback by Randy & Tom:**
    i. The current layout restricts visibility – users can only view 1–2 calls at a time due to spacing and design constraints.
    ii. There's excessive unused vertical space, particularly above the call list.
    iii. Requested optimization to display more calls simultaneously for easier scanning and efficiency.
    iv. Tom suggested the redesign should utilize vertical space better to allow more rows of calls without crowding.

j. **Customization Proposal**
    i. Randy's Suggestion:
        1. Allow users (especially officers) to **fully control column visibility**, including hiding irrelevant fields such as "Standing Site Coverage."
    ii. Tom's Support:
        1. Proposed enhancing column configuration to **enable all users to select/deselect any field** they prefer, not just a limited subset.
        2. Goal: Empower users to tailor their dashboard to their operational needs.

k. **Dead Space Concerns:**
    i. Excessive unused space around the call interface noted.
    ii. Multiple redundant headers and sections clutter the view (e.g., open calls showing twice).
    iii. A specific bar could not be removed by clicking "X" or "Read"—Randy noted the "Read" button is non-functional across users.

l. **Notification Handling Issues:**
    i. Clicking "Read" does not acknowledge or clear notifications properly.
    ii. Suggested solution: Acknowledge with a checkmark or implement a "Clear All" functionality, which Jaspreet confirmed exists in the system.

m. **Data Prioritization Suggestions:**
    i. The "Updated At" timestamp is considered more critical than the

RP's (Reporting Party's) name.

ii. RP name should be part of the call description rather than taking up a full column.

n. **Screen Real Estate Optimization:**
   i. Columns like "Overall Site Coverage" are unnecessary for patrol users and should be optional/removable.
   ii. Suggested: Enable users (especially patrol officers) to toggle visibility of all columns based on preference.

o. **Column Customization Feature**
   i. Patrol users should be able to customize what data columns they view, with the option to simplify down to just **Call Location** and **Description**.
   ii. Jaspreet acknowledged and confirmed this update would be implemented.

p. **Quick Action Buttons Integration**
   i. **Key Buttons Requested:**
      1. **En Route**, **Arrived**, **Cleared**—as large touch-friendly buttons.
      2. Current action buttons are too small and not suitable for touchscreen-heavy workflows.
   ii. **Placement Suggestions:**
      1. Quick buttons should be placed at the top of the call card or call detail view.
      2. Big "Hot Buttons" should allow single-click updates from touchscreen devices without needing precision.
   iii. **Operational Flow:**
      1. Hot button actions by officers should queue in a pending list visible to dispatchers.
      2. Dispatchers can then validate and log those actions accordingly—ensuring no officer goes unacknowledged.
   iv. **Geofencing Feature Reminder:**
      1. The system will auto-identify location using geofencing; pressing "10-97" (Arrived) will auto-fill the location.

q. **Notification System Enhancements**
   i. **General Agreement:**
      1. Current implementation of notifications needs improvement in usability.
      2. Clear All / Mark All as Read features should be prominently available.
      3. Visual feedback (like a checkmark) preferred for acknowledgment.

r. **Breadcrumb Navigation & Space Optimization**
   i. **Breadcrumb Removal Discussion:**
      1. Removing breadcrumbs can free up vertical space.
      2. Tom and Jaspreet discussed removing only the redundant layers (e.g., "Dashboard > Open Calls").
      3. Teresa flagged breadcrumbs as useful for deep navigation (e.g., company settings → templates), and emphasized they should **not** be fully removed.

4. **Conclusion:** Remove breadcrumb **only where redundant**, retain for deep-link navigation.

s. **UI/UX Layout Revisions**
    i. **Tom's Input:**
        1. Suggested removing redundant menu areas (e.g., duplicate “open calls”, “past calls”, etc.)
        2. Move "Add New Call" and other key items inline with the top-level dashboard menu.
        3. Create quick action space on the right (buttons like En Route, Arrived, Cleared, Code 7, Code 8, SOS).
        4. Dead spaces on the dashboard must be eliminated for better visual real estate.
    ii. **Teresa's Suggestion:**
        1. Recalled early decision to allow layout customization (top nav vs side nav).
        2. Proposed revisiting the idea of layout options rather than locking into top nav only.
    iii. **Jaspreet's Concern:**
        1. Mentioned existing plan to move sidebar into top nav eventually.
        2. Cautioned that prematurely implementing top-nav-only may affect design integrity.
    iv. **Resolution:**
        1. Prototypes for 1–2 screen layouts to be created with revised design.
        2. PC version to prioritize all menu items and action buttons inline at the top.
        3. Mobile layout to follow UI/UX standards with possible modifications.
        4. Dead spaces and non-functional UI sections to be optimized.

t. **Quick Action Buttons & Status Tab**
    i. Buttons like **En Route**, **Arrived**, **Cleared**, **Break**, **Lunch**, and **SOS** to be added in the top-line action bar.
    ii. On **Status Tab**, include Officer Phone Record Search at the top and reduce unused space.
    iii. Options to **hide/show filters** to increase viewable content.
    iv. Button/input sizes to adapt based on screen size and resolution.

u. **Session & Cookie Handling**
    i. Tom raised a long-standing issue with cookie/session persistence across domains.
    ii. He emphasized this recurring bug has a serious impact on usability.
    iii. Team to prioritize fixing this issue to avoid frequent logouts and forced cookie clearing.

v. **Reporting & Email Delivery Issues**
    i. **Reports did not go out** this morning as expected.
    ii. Teresa confirmed failure across multiple email attempts; test mails also not received.
    iii. Randy highlighted the **critical nature of reporting** as a key differentiator for the company.

    iv. Tom stressed urgency and potential **client cancellation risk** if not resolved immediately.
    v. Jaspreet confirmed receiving some test emails, but inconsistency remains.
    vi. **Immediate Action:**
        1. Team to stay online and resolve the email/reporting issue without delay.
        2. Organizer to verify if the problem is with specific addresses or the system-wide email module.

7. **Future Enhancement – Email Logs**
    a. The old system showed email send status (success/failure).
    b. The current system lacks visibility on whether emails went out.
    c. Decision: **Create a new UI screen to show email delivery logs** per client with timestamp and status.
8. **Meeting Schedule Update**
    a. **Next Thursday's meeting rescheduled to Tuesday.**
    b. The **week after**, team unavailable on **Wednesday and Thursday**.
    c. Teresa to coordinate and share updated meeting invites.