

Minutes of Meeting

Date and Time	17 May 2025 16:30 PST	Meeting type	Zoom
Organiser	Teresa	Client	Citywide

Attendees (Internal)

- Kuldeep
- Jaspreet

Attendees (Client Side)

- Teresa, David

Agenda

- **Discussions on the following:**
 - Notification setup and employee management
 - Report Timing Issue
 - Post-Order Document Upload
 - GPS and Location Accuracy
 - System Configuration Updates
 - Calls for Service Reporting
 - Responding Agencies
 - QuickBooks Integration
 - Data Integrity & Report Handling
 - Form and Report Editing
 - Dropdown Options for Responding Agencies
 - Image Viewing in Reports (PDF vs System)
 - Report Formatting – Text Bunching & Symbol Issues
 - Agency and Response Fields Duplication
 - Form Fields: Trespass, Crime Potential, and Charges
 - Site Visibility Issue
 - Document Visibility Issue
 - Pass-Downs – Mark as Read Issue
 - Login/Logout Problem on Samsung S24
 - Mobile Build Testing and Feedback
 - ERM Module Introduction

The following things are discussed:

1. Notification setup and employee management

- a. Notifications for leave requests and driver's license reminders to be included in the next build.
- b. **Action:** Dev team ensures notification setup is implemented in the upcoming build.

2. Report Timing Issue

- a. Reports always pull data from **6 AM (previous day) to 6 AM (current day)** regardless of selected delivery time.
- b. **Issue Identified:** Changing report dispatch time to 7:30 PM did not function as expected.
- c. **Action:** Investigate and fix report time dispatch glitch if any.

3. Post-Order Document Upload

- a. Upload functionality exists, but users had trouble accessing post-order documents.
- b. **Action:** Clarify separation of general documents and post-orders. Ensure this is reflected in the UI.

4. GPS and Location Accuracy

- a. The web version has limited GPS accuracy; the upcoming **mobile app** will significantly improve this.
- b. Mobile app currently in final testing phase, expected release within 30 days.
- c. **Action:** Users advised to log into mobile apps (even passively) for accurate location tracking.

5. System Configuration Updates

- a. **HR Configuration:** Now allows self-service additions of departments, worker's comp codes, employment types, and custom end-of-shift messages.
- b. **Shift Logs:** Users can configure acknowledgment messages when clocking out and optionally include shift times in reports.
- c. **Action:** Teresa to provide training on accessing and utilizing these new settings.

6. Calls for Service Reporting

- a. The new setting allows inclusion of the time a call was created, in addition to response time.
- b. **Action:** Optional configuration available under company settings.

7. Responding Agencies

- a. The new feature allows adding and selecting responding agencies (e.g., fire, medical) directly linked to site notes and call entries.
- b. **Action:** David to begin inputting agencies as needed.

8. QuickBooks Integration

- a. **Auto-Invoicing:** Future feature to allow direct communication with QuickBooks, eliminating double entry.
- b. **Payroll Sync (Future Build):** Scheduling and attendance data integration discussed; acknowledged as a potential future feature.
Action: Teresa to prioritize invoicing; note payroll integration as a roadmap item.

9. Data Integrity & Report Handling

- a. **Deletion Policy:** System does not allow deletion of DARs, reports, or citations by default, to maintain data integrity.
- b. **Action:**
 - i. The dev team to implement permission-based delete functionality:
 - ii. Only authorized users (e.g., owners) will be able to delete or archive entries.
 - iii. Permissions can be configured individually, not just by role.

10. Form and Report Editing

- a. **Current Limitation:** Completed reports cannot be edited.
- b. **Update in Progress:** Feature to allow post-submission editing (under controlled access) is under development. Also need the 10- codes dropdown in the forms to identify the criminal act.
- c. **Action:** The dev team confirmed this feature is already in the pipeline and expected in the next build.

11. Dropdown Options for Responding Agencies

- a. David clarified this was now understood after explanation in the previous session.

Action: No additional action required.

12. Image Viewing in Reports (PDF vs System)

- a. **Issue:** In emailed PDF reports, users must click images one-by-one; navigation arrows are not present.
- b. **Cause:** System-generated PDF files limit interactivity; this is outside system control.
- c. **Bug Identified:** In some cases, only one image is visible due to linking issues.
- d. **Resolution:** Jaspreet confirmed it's a glitch in image linking; the team will fix.
- e. **Client Portal Alternative:** Images will be viewable with navigation arrows if accessed via the client portal (not via downloaded PDFs).
- f. **Action:**
 - i. Fix image linking bug.

13. Report Formatting – Text Bunching & Symbol Issues

- a. **Issue:** In DARs, user-entered narratives and follow-up questions/answers appear jumbled or merged in the final report.
- b. Special characters (e.g., &, spacing) may be causing formatting bugs in generated reports.
- c. **Example:** System shows questions immediately after narrative text without line separation.
- d. **Cause:** System may be misinterpreting spacing or formatting, possibly due to how inputs are captured from templates or how activity codes are defined.
- e. **Action:**
 - i. The dev team will investigate formatting bugs.
 - ii. Validate and test handling of line breaks, paragraphing, and data separation in reports.
 - iii. Need narrative in the reports to have separate sections' identification.

14. Agency and Response Fields Duplication

- a. **Issue:** When entering agency names or unit numbers (e.g., "COCO FD", "CFD Engine 33"), DARs sometimes duplicate or incorrectly combine information.

- b. **Suspected Cause:** Field inputs with the same label might be overriding each other or confusing the report logic.
- c. **The dev team Initial Finding:** Identical field names in the template may be interpreted as overlapping values. Label duplication may not be the direct cause but needs further testing.

15. Form Fields: Trespass, Crime Potential, and Charges

- a. **Trespassing form requires new fields:** Date of Birth, Phone Number, and Vehicle Info.
- b. **Crime Potential:** Incorrect dropdowns showing (e.g., from Parking Violations).
- c. **Charges Management:** System allows for adding charges but currently linked only to Parking Violations(citation), not charges(trespass).
- d. **Action:**
 - i. Link charges to relevant forms like Trespass.
 - ii. Resolve dropdown misalignment with proper field mappings.
 - iii. Ensure admin users can manage dropdowns independently via settings.
 - iv. Need colors' drop down in the field interviews.

16. Site Visibility Issue

- a. After adding a new site, all other sites temporarily disappeared. Only the new site was visible until the following day.
- b. System roles were updated to ensure **Account Managers** see all assigned sites. **Super Admins** have full visibility by default.

17. Document Visibility Issue

- a. **Problem:** Uploaded documents (e.g., photos, permits, additional paperwork) sometimes disappear from the view mode but are visible in edit mode.
- b. **Specific Cases:** Employee files for Joe and Patrick had missing attachments on view mode.
- c. **Action:**
 - i. The dev team confirmed it's a UI bug—data is intact but not displaying properly.
 - ii. Fix scheduled in the next build to correct document visibility.

18. Pass-Downs – Mark as Read Issue

- a. **Issue:** Staff was unable to mark pass-downs as read on mobile.
- b. **Root Cause Identified:** UI limitation on mobile – user must swipe left to see the “Mark as Read” button.
- c. **Action:**
 - i. The dev team will improve UX visibility in future builds.
 - ii. David to confirm if the issue is resolved after testing with the officer directly.

19. Login/Logout Problem on Samsung S24

- a. **Reported Behavior:** Joe's app logs him out when switching between apps, and after three re-logins, he is locked out.
- b. **Device Used:** Samsung S24 (same model David previously used without issues).
- c. **Next Step:** David to test Joe's device personally during site visits.
- d. **Action:**
 - i. David to provide an update after troubleshooting.
 - ii. The dev team will verify behavior with similar devices internally.

20. Mobile Build Testing and Feedback

- a. **Reminder:** Teresa to provide mobile feedback by the end of the month.
- b. **TestFlight Access:** Additional team members can be added; emails to be shared for access.
- c. **Action:**
 - i. Teresa to test mobile build over the weekend.
 - ii. Provide feedback for refinement before production release.

21. ERM Module Introduction

- a. **Update:** Team sent an email with details about the ERM module.
- b. **Offer:** The dev team is available to provide a demo or training session if needed.
- c. **Action:**
 - i. Teresa to review the ERM module material.

