

Minutes of Meeting

Date and Time	05 June 2025 09:00 PST	Meeting type	Zoom
Organiser	Mr. Rupesh	Client	Citywide

Attendees (Internal)

- Rupesh
- Kuldeep
- Jaspreet
- Gurpreet
- Sangita
- Vishesh
- Avinash
- Akash
- Ajay
- Amit

Attendees (Client Side)

- Tom, Teresa, Randy, Matt

Agenda

- **Discussions on the following:**
 - Payroll Discussions
 - Closed Server Discussion
 - Command Hub Admin Panel for Billing & Usage
 - ERM Enhancements
 - Form Builder & Use of Force Report
 - Mobile App Status
 - Backlog & Feature Prioritization
 - Priority Feature Updates

The following things are discussed:

1. **Payroll Discussions**
 - a. **Payroll Report Demonstration**
 - i. Kuldeep shared a demo of the payroll reporting feature under the scheduling tab.

- ii. The current implementation allows generation of **PDF and CSV reports** from the scheduler based on sample formats provided by Teresa.

b. Confusion Around Payroll Report Location

- i. **Concern raised by Teresa:** It's counterintuitive to generate payroll reports from the scheduling tab.
- ii. **Suggestion:** Payroll reports should be accessible directly from the payroll module, not scheduling.
- iii. **Action:** Organizer acknowledged and agreed to **move the CSV export functionality to the payroll section.**

c. Current Limitations Identified

- i. Teresa could not test the payroll system as **auto-generated reports are not yet appearing**.
- ii. Inability to select **multiple departments** when generating payroll reports.
- iii. The existing system only allows generating reports one department at a time.
- iv. Payroll reports should be usable for:
 - 1. Full cycle exports (after payroll closes).
 - 2. Manual off-cycle calculations (e.g., for terminations).

d. Required Changes and Improvements

- i. Move CSV export from scheduling to payroll tab.
- ii. Maintain **PDF reports** for ad-hoc or off-cycle use within the scheduling tab.
- iii. Enable **multi-department report generation**.
- iv. Allow **post rate mapping** and implement visibility/access restrictions to sensitive payroll data.

e. Auto-generation and Scheduling

- i. Payroll is currently auto-generated based on a fixed **pay date (e.g., 25th of the month)**.
- ii. **Issue:** This timing is too late for payroll processing needs.
- iii. **Decision:** Kuldeep will modify the cron job so payroll is generated the day **after the pay period ends** (e.g., 16th and 1st of the month).

f. Immediate Tasks and Timeline

- i. **By Tomorrow (June 7):** Manually run payroll for May 16–31 via API to allow testing and comparison with existing systems.
- ii. **By June 16:** System should auto-generate payroll for June 1–15.
- iii. **Weekend Build:** Move necessary changes (filters, CSV export, date range selection) to production.

g. Data and Privacy Concerns

- i. Payroll data (including pay rates) needs to be entered for each employee profile.
- ii. Access to payroll data should be limited to specific roles (e.g., Teresa and Tom).

h. Client Matching

- i. Client names/numbers in the system should match exactly with **QuickBooks**.
- ii. Need to cross-verify client info and ensure service rates (post rate) are configured correctly.

2. Closed Server Discussion

a. Closed Server Setup for security sensitive client

- i. **Client Requirement:** Some clients (e.g., law enforcement, casinos) require closed/on-premise servers for data privacy/security.
- ii. **Concerns:** How to support, update, and bill these clients while respecting their restrictions.
- iii. **Feasibility:**
 1. Possible to deploy Command Hub codebase on client's internal servers.
 2. Remote setup possible if one-time access is provided.
 3. If remote access is denied, physical deployment will be necessary.
 4. Future support/update can be requested with access temporarily reinstated.
- iv. **Conclusion:** Technically feasible. Requires clear documentation and environment compatibility. Organizer to send Teresa and Tom a questionnaire/form for assessing infrastructure.

b. Billing for Closed Server Clients

- i. **Billing Structure:** Only charge for software license, code, and support.
- ii. No server/cloud hosting costs to be included.
- iii. **Matt's input:** Not available in the call. Further discussion may be required.
- iv. **Action:** Research reduced billing model and document approach.

3. Command Hub Admin Panel for Billing & Usage

- a. **Teresa's Requirement:** Ability to view all clients, user types (admin/dispatcher), scheduled hours to ease billing.
- b. **Current Status:**
 - i. Admin Panel feature discussed before but not yet implemented.
 - ii. The dev team confirmed it is planned, and a dedicated team will be assigned.
- c. **Timeline:** Planning and timeline to be shared in next Tuesday's follow-up meeting.

4. ERM Enhancements

- a. **Current Status:** In staging environment, pending testing by Teresa.
- b. **Planned Go-Live:** Can move to production after validation.
- c. **New Feature Request:** Internal complaint system for employees.
 - i. Employees should be able to submit complaints (e.g., harassment, hostile work environment).
 - ii. Assigned HR investigator, investigation flow, result logging required.
- d. **Discussion:** May be added **post-ERM release** as an additional feature.
- e. **Action:** Ticket to be created under "New Features."

Teresa and Tom to finalize complaint types and workflow.

5. Form Builder & Use of Force Report

- a. **Client Request:** Some clients asked for a **Use of Force Report** form.
- b. **Proposed Solution:** Use existing **assignment template builder** as a form builder.
 - i. Users can create their own forms (e.g., harassment, use of force, incident).

- ii. Ability to print/view report formats remains a consideration.

c. Action Items:

- i. Teresa to **compile form content** from prior submissions (e.g., Randy's and ESF's versions).
- ii. Team to **replicate form builder UI** under "Forms" section.
- iii. Teresa and Tom to work on final mockup/design and send to the dev team.

6. Mobile App Status

a. Update:

- i. The app is **approved on both Play Store and App Store**.
- ii. Awaiting final production testing and some approvals from Tom's end.

b. Action Item:

- i. Final testing and production push to be completed after approval.

7. Backlog & Feature Prioritization

a. Agreement:

- i. A **new tab** will be added to the existing Excel file listing:
 1. Backlog items
 2. In-progress features
 3. New feature requests
- ii. Shared prior to next meeting for **priority sorting**.

b. Action Items:

- i. DITSTEK to share updated Excel.
- ii. Tom and team to review and assign priorities.

8. Priority Feature Updates

a. Top Priorities Identified:

- i. **Payroll Module** – Priority 1, due to high monthly costs and operational need.
- ii. **Scheduling Enhancements** – Including filters and open shift requests.
- iii. **Report Approval Workflow**
- iv. **Shift Acknowledgement by Agents**
- v. **Split Beat Feature** – Development completed; currently in testing.

