Minutes of Meeting

Date and Time	17 June 2025 09:00 PST	Meeting type	Zoom
Organiser	Mr. Rupesh	**Client**	Citywide

Attendees (Internal)
- Rupesh   - Kuldeep   - Jaspreet   - Sangita   - Gurpreet   - Vishesh   - Kapil   - Amit
Attendees (Client Side)
Tom, Teresa, Matt

Agenda

- **Discussions on the following:**
  - Priority Tasks Update
  - ERM Status
  - Scheduling Demo and Next Meeting
  - Discussion on Operations Report (OPS Report) Requirements
  - Breakdown of OPS Report Sections
  - Discussion on Manual and Billable Hours
  - Overtime and Staffing Calculations
  - Handling Employee Staffing for Departments
  - Manual Entry and Report Generation
  - Action Items and Next Steps
  - Scheduling System Update
  - Duplicate Report Issue
  - Client Feedback (Security and Special Police)
  - QuickBooks Integration
  - Payroll Integration with QuickBooks
  - API Access for Payroll
  - Mobile App Testing & Updates

The following things are discussed:

1. **Priority Tasks Update:**
    a. New Priorities:
        i. Tom updated the team on a recent meeting with BCI, which was positive. BCI's directors will review the system, and if they approve, it will be taken to the company executives for further review.
        ii. Tom mentioned that two things need to be prioritized:
            1. **Activity Tracking** - This will be added as a high-priority item. Teresa will create a ticket for it.
            2. **Employee Help & Support Forms** - This includes forms for different employee-related requests (e.g., raise requests), with a dynamic form where the user can submit reports anonymously.
            3. **Analytics and Payroll Updates -**
                a. Payroll: The dev team confirmed that the payroll updates are almost complete and that the filter has been successfully moved from the scheduling to the payroll screen. The target for this is to go live on June 21st.
                b. Analytics: The analytics feature is currently in progress. The dev team clarified that the team has started working on client analytics and is now working on a data program for comparison (current, last, and prior week).
                    i. Tom emphasized the importance of refining the analytics to provide insights on risk management (e.g., incidents, complaints, violations) and being able to compare current data with past periods.

                    ii. Analytics should help companies like BCI and Kaiser make decisions based on performance data and risk analysis, not just raw numbers.

                    iii. Tom also discussed the need to track why clients are lost, whether due to low budget, service performance, or incidents.
                c. Action Items for Analytics and Employee Help & Support
                    i. **Employee Help & Support**: Tom emphasized that this feature must be implemented to support large clients like ESR (285,000 employees).
                    ii. **Analytics**: Tom emphasized the importance of ensuring the analytics feature tracks specific reasons for incidents or complaints. Future AI

involvement will help streamline reporting and provide recommendations based on data patterns.

4. **Timeline and Prioritization:**
    a. The team agreed that the top priorities are:
        i. **Payroll Updates (due by June 21st)**
        ii. **Analytics (in progress, with a demo expected soon)**
        iii. **Activity Tracking (high priority once the ticket is locked)**
    b. The dev team confirmed that a third column will be added to the tracking sheet, showing the estimated completion dates for each task.
    c. A meeting will be scheduled to review the final prioritization list.
5. The dev team mentioned that tickets in the backlog will be reviewed and prioritized to ensure they are not delayed further. they will update the statuses of all tickets, especially those in progress, and share them with **Teresa** to allow prioritization.

2. **ERM Status:** The ERM system is currently on staging and awaiting approval from Teresa. There were some issues with adding new users, which Teresa will test today.
3. **Scheduling Demo and Next Meeting**
    a. The dev team confirmed that a demo of the scheduling system progress will be shared during the next call.
    b. A meeting with Kaiser is scheduled for Friday at noon to discuss progress on the account.
4. **Discussion on Operations Report (OPS Report) Requirements:**
    a. **Teresa** shared the requirements for the operations report. The report should be able to pull data from both the **schedule** and **attendance** systems. It should also allow the selection of a customized **date range** to track various metrics like:
        i. Scheduled ships, open ships, assigned and worked ships.
        ii. Total hours worked, open hours, and worked hours.
    b. The report should provide numbers on hours and show:
        i. Total scheduled hours
        ii. Open hours
        iii. Worked hours
        iv. Assigned hours
        v. Overtime and its percentage
    c. **Tom** emphasized the importance of adding **budgeted hours** for each department and tracking the **percentage** of the budgeted hours either met or exceeded. This should be incorporated into the report.
5. **Breakdown of OPS Report Sections**
    a. **Teresa** clarified that the first section of the OPS report is based on data from the **e-time system** while the second section uses data from Google Docs or manually created spreadsheets to calculate the overtime and budgeted hours.
    b. **Tom** explained that the OPS report needs to include:

i. Weekly, monthly, quarterly, semi-annual, and annual comparisons.
ii. Visualization of progress with graphs.
iii. A **manual or automatic input** of budgeted hours for each department.
iv. For example, departments such as **dispatch** may have 40-hour work weeks, while standing guards may have "billable hours."

6. **Discussion on Manual and Billable Hours**
    a. **Tom** requested that the report should be able to track both **billable hours** (which are the hours clients are paying for) and **budgeted hours** (the hours the company has set for each department). It should also calculate **overtime** based on these.
    b. The system should generate reports for each **department** (e.g., **admin**, **patrol**, **standing guard**) and show the performance based on actual vs. budgeted hours.
    c. **Tom** further clarified that the **budgeted hours** for departments can be set manually in the system and should be mapped to each department's report.
7. **Overtime and Staffing Calculations**
    a. **Tom** highlighted the complexity of calculating overtime, especially when there are different types of overtime, such as **double-time** and **alternative coverage**. The goal is for the system to automate these calculations.
    b. **Teresa** suggested that the system could help with calculating the number of staff needed based on scheduled hours, dividing the total by 40 to determine the number of **full-time officers** required.
    c. **Tom** also proposed that the system could help identify if there are **understaffed or overstaffed** departments and generate auto-notes for this.
8. **Handling Employee Staffing for Departments**
    a. **Tom** asked for the system to automatically compare the number of **full-time** vs. **part-time** employees and suggest staffing adjustments. For example, if the system shows that a **patrol department** needs 20 employees based on budgeted hours, it should also consider whether there are enough **full-time** and **part-time** employees to meet this requirement.
9. **Manual Entry and Report Generation**
    a. The team discussed how the **budgeted hours** can be entered manually for each department and the **billable hours** calculated automatically. The final report would compare the **actual performance** with the budgeted hours, allowing for easier analysis and decision-making.

10. **Action Items and Next Steps**
    a. **The dev team** to further investigate the formula used for calculating staffing needs, specifically dividing billable hours by 40.
    b. **Teresa** will resend the example OPS report as discussed.
    c. **Tom** emphasized the importance of accurate and automated reporting and encouraged the team to focus on simplifying calculations.
    d. **The dev team** to gather more details on the system's ability to generate auto-notes for changes in staffing and report performance metrics.
11. **Scheduling System Update**
    a. **Teresa's Request**: Teresa asked for a feature to be added where employees cannot be scheduled until they complete a specific course (e.g., harassment training). This would help in sensitive HR situations. The feature would

    apply to a course and not individual employees.
    b. **Action Item**: Implement a checkbox/radio button that prevents scheduling until course completion.

12. **Duplicate Report Issue**
    a. **Teresa** inquired about the ongoing issue of receiving duplicate automated reports.
    b. **The dev team** explained that they suspect it's a time zone issue affecting specific sites, and they are working on resolving it.
    c. **Action Item**: Continue working on resolving duplicate report issue for specific sites.

13. **Client Feedback (Security and Special Police):**
    a. **Teresa** shared positive feedback from the Security and Special Police team. They completed the setup for all sites and personnel and were happy with the system. The main concern was a permissions issue with one user.
    b. **The dev team** clarified the issue was related to multiple access levels being granted to a user, preventing them from seeing all sites.
    c. **Action Item**: Submit a support ticket for the user permission issue and review the API requirements for QuickBooks integration.

14. **QuickBooks Integration:**
    a. **Teresa** asked about the process for linking QuickBooks with the payroll system. She wanted to know if QuickBooks needed to be upgraded for payroll integration.
    b. **The dev team** clarified that a developer account with QuickBooks is required to obtain API keys, which would be used for system integration. No additional fees for QuickBooks' API were expected.
    c. **Action Item**: Share instructions on how to create a developer account with QuickBooks for API keys. Continue working on integration for payroll.

15. **Payroll Integration with QuickBooks:**
    a. **Teresa** inquired about integrating payroll with QuickBooks, similar to the invoicing integration.
    b. **The dev team** confirmed that this would require a separate API setup but could be accomplished with QuickBooks.
    c. **Action Item**: Determine whether the current QuickBooks sandbox account supports payroll or if additional permissions are needed.

16. **API Access for Payroll**
    a. **Tom** proposed that it might be better for the client to provide their payroll login details to complete the API connection, but **Teresa** expressed concerns about getting this information.
    b. **Matthew Gardner** clarified that the API will allow access through the system, meaning login details would not be required from the client.
    c. **Action Item**: Implement the API connection for payroll without requiring direct client login information.

17. **Mobile App Testing & Updates:**
    a. **Teresa** expressed concern about the mobile app's testing timeline. The team was supposed to have a control version of the app available by the 16th, and testing was expected to start immediately to roll out by the 1st.
    b. **The dev team** confirmed the app had a few issues with offline functionality but was available for testing. A fix for the issues would be pushed by tomorrow, and full testing could begin before the 23rd.

c. **Action Item**: Finalize the offline functionality and update the app build. Provide the new version for testing before the 23rd.