Summary

**Meeting Overview**

A demonstration of the new P&L dashboard integration with the forecasting system was conducted, including the new P&L link in the header, updated forecast tabs, and context retention when navigating between tabs. The team also discussed performance issues and potential improvements before the pilot release.

**Feature Demonstration**

* New P&L view link added to the top navigation
* Updated tab names on the forecast page:
  + "Statistics" renamed to "Parking Stats"
  + "Payroll" renamed to "Payroll Expense"
  + "Rates" renamed to "Parking Rates"
  + "Other Expense" and "Other Revenue" remained the same
* Context retention demonstrated: when switching between forecast and P&L views, the system maintains selected site, time period, and active tab

**Issues Identified**

* Performance issues when loading the P&L view, particularly with larger data sets
* Inconsistent filter behavior: using the P&L link from the forecast page correctly applies site filters, but using the top navigation doesn't maintain these filters
* Year selection in forecasts doesn't carry over to the P&L view (stays at 2025 when 2024 was selected)

**Performance Improvements**

* Identified a synchronous processing bottleneck in the management agreement calculators
* Determined that internal revenue management calculators are waiting for each calculator to finish before proceeding
* Agreed that refactoring to use asynchronous processing (similar to other calculators) should improve performance

**Action Items**

* [ ]  Fix the top navigation to properly maintain site filters from forecast when navigating to P&L
* [ ]  Refactor calculator code to be more efficient (focus on management agreement calculators)
* [ ]  Ensure year selection in forecasts carries over to P&L view
* [ ]  Implement improvements before pilot release

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Andrew Scheuer

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Jonathan Aulson

0 minutes 4 seconds0:04

Jonathan Aulson 0 minutes 4 seconds

No, no big news other than they're gonna escalate with IT to get some stuff done, hopefully. So that's it.

Christopher Thompson

0 minutes 13 seconds0:13

Christopher Thompson 0 minutes 13 seconds

Cool. New ideas means new stories, right? Means more work. Ohh Hey, that's even better.

Jonathan Aulson

0 minutes 18 seconds0:18

Jonathan Aulson 0 minutes 18 seconds

Yeah, yeah. New SOW, yeah.

Andrew Scheuer

0 minutes 22 seconds0:22

Andrew Scheuer 0 minutes 22 seconds

That's the most important part.

Jonathan Aulson

0 minutes 25 seconds0:25

Jonathan Aulson 0 minutes 25 seconds

Alright.

Christopher Thompson

0 minutes 26 seconds0:26

Christopher Thompson 0 minutes 26 seconds

Cool. Well, that's Good to hear. I wasn't sure exactly when that was. So, yeah, awesome. You know, so let me share. I mean, this, this story is pretty straightforward.

Christopher Thompson 0 minutes 42 seconds

So so in this one basically the bulk of IT is will now have a PNL link in our header also updating the tabs on the forecast.

Christopher Thompson 0 minutes 57 seconds

And then clicking on any tabs, navigate between tabs and it'll retain your context on the forecast tab. Let's see PNL view.

Christopher Thompson 1 minute 13 seconds

Yeah, so basically being able to switch back and forth and and still remembering basically what is on the forecast tab. So right to it. So this is local running off of the feature branch. You'll see now we have our PNL view up on the top now.

Christopher Thompson 1 minute 32 seconds

And IT runs off the same logic that our forecasts do. So I got the account manager in order to see it, which I don't know actually. Oh yeah, I'd have to change.

Jonathan Aulson

16 minutes 19 seconds16:19

Jonathan Aulson 16 minutes 19 seconds

Well, but.

Andrew Scheuer

16 minutes 19 seconds16:19

Andrew Scheuer 16 minutes 19 seconds

Yeah, that was that was my fault. I I added those in.

Christopher Thompson

16 minutes 19 seconds16:19

Christopher Thompson 16 minutes 19 seconds

If we can avoid it.

Jonathan Aulson

16 minutes 24 seconds16:24

Jonathan Aulson 16 minutes 24 seconds

Uh.

Christopher Thompson

16 minutes 24 seconds16:24

Christopher Thompson 16 minutes 24 seconds

OK. So yeah, so I think there's a refactor that we can do before pilot. We'll just want to be kind of careful with it to make sure we don't obviously break anything, but.

Jonathan Aulson

16 minutes 29 seconds16:29

Jonathan Aulson 16 minutes 29 seconds

OK.

Jonathan Aulson 16 minutes 35 seconds

Yeah, no, that's that's good news because it it's hard to like, it's good that we're redesigning it, but it's hard to explain how we thought it was gonna work. Well, you know what I mean? If it if in pilot, it won't. So yeah.

Christopher Thompson

16 minutes 36 seconds16:36

Christopher Thompson 16 minutes 36 seconds

Um.

Christopher Thompson 16 minutes 49 seconds

Yeah.

Jonathan Aulson

16 minutes 51 seconds16:51

Jonathan Aulson 16 minutes 51 seconds

Cool. All right. Well, we we'll plan for plan for that to happen.

Christopher Thompson

16 minutes 55 seconds16:55

Christopher Thompson 16 minutes 55 seconds

OK, so while I'm thinking about it, I'm gonna go here. I'm gonna add one more task onto this to retain.

Christopher Thompson 17 minutes 8 seconds

Hello.

Christopher Thompson 17 minutes 22 seconds

So and then just to clarify, so if I am in my forecast first and I have this set, if I use this nav, it should only use whatever site I have in here. Same way this button works right?

Jonathan Aulson

17 minutes 38 seconds17:38

Jonathan Aulson 17 minutes 38 seconds

Yeah, yeah, yeah. It should kind of treat the site selector here like it's a filter on the PNL.

Christopher Thompson

17 minutes 47 seconds17:47

Christopher Thompson 17 minutes 47 seconds

OK.

Jonathan Aulson

17 minutes 47 seconds17:47

Jonathan Aulson 17 minutes 47 seconds

The site and year, yeah.

Christopher Thompson

17 minutes 49 seconds17:49

Christopher Thompson 17 minutes 49 seconds

So if like you said finance users, if for some reason they come in and they do actually set a forecast and then use this, it would behave that same exact way, right? So OK and if we go like from here to statements.

Jonathan Aulson

18 minutes 2 seconds18:02

Jonathan Aulson 18 minutes 2 seconds

Yes, yeah, yeah.

Christopher Thompson

18 minutes 9 seconds18:09

Christopher Thompson 18 minutes 9 seconds

And then the piano view. Should we still know? Like I guess I'm wondering if I should like have like global.

Christopher Thompson 18 minutes 19 seconds

Variable that I'm using for that.

Jonathan Aulson

18 minutes 20 seconds18:20

Jonathan Aulson 18 minutes 20 seconds

I mean, honestly, ideally, yes. Yeah, it would be global.

Christopher Thompson

18 minutes 24 seconds18:24

Christopher Thompson 18 minutes 24 seconds

OK.

Christopher Thompson 18 minutes 26 seconds

Which I think we have something 'cause this filter's set somewhere, so I need to figure out how we're setting that filter and.

Jonathan Aulson

18 minutes 31 seconds18:31

Jonathan Aulson 18 minutes 31 seconds

OK.

Christopher Thompson

18 minutes 35 seconds18:35

Christopher Thompson 18 minutes 35 seconds

We'll be able to use that, OK.

Jonathan Aulson

18 minutes 37 seconds18:37

Jonathan Aulson 18 minutes 37 seconds

OK. The the other piece is just to call it out here is also important. I don't, I don't know if we demoed it, but if they set the year to either past or future year, then the PNL needs to keep pace.

Christopher Thompson

18 minutes 53 seconds18:53

Christopher Thompson 18 minutes 53 seconds

Most of the piano needs to also.

Christopher Thompson 18 minutes 56 seconds

be for that year.

Jonathan Aulson

18 minutes 58 seconds18:58

Jonathan Aulson 18 minutes 58 seconds

Yep.

Christopher Thompson

19 minutes19:00

Christopher Thompson 19 minutes

Oh, hold on, let me go. So 2024.

Christopher Thompson 19 minutes 5 seconds

We do it from here. Are we already doing that? No, it just goes to 2025.

Christopher Thompson 19 minutes 15 seconds

OK.

Jonathan Aulson

19 minutes 15 seconds19:15

Jonathan Aulson 19 minutes 15 seconds

Yeah.

Christopher Thompson

19 minutes 16 seconds19:16

Christopher Thompson 19 minutes 16 seconds

Uh, so let me add that into this task.

Christopher Thompson 19 minutes 22 seconds

Uh.

Christopher Thompson 19 minutes 38 seconds

OK.

Christopher Thompson 19 minutes 42 seconds

I think that makes sense. OK, so yeah, so there's that outstanding task. I will work on that for the rest of the day and hopefully get a PR up.

Jonathan Aulson

19 minutes 46 seconds19:46

Jonathan Aulson 19 minutes 46 seconds

OK.

Christopher Thompson

19 minutes 56 seconds19:56

Christopher Thompson 19 minutes 56 seconds

I'll probably do it tomorrow morning or this afternoon.

Jonathan Aulson

20 minutes20:00

Jonathan Aulson 20 minutes

But.

Jonathan Aulson 20 minutes 1 second

Man, uh, this is. I feel like this is a really successful process. Thank you guys.

Christopher Thompson

20 minutes 5 seconds20:05

Christopher Thompson 20 minutes 5 seconds

Yeah, same here.

Andrew Scheuer

20 minutes 6 seconds20:06

Andrew Scheuer 20 minutes 6 seconds

Yeah, yeah, I like it.

Jonathan Aulson

20 minutes 9 seconds20:09

Jonathan Aulson 20 minutes 9 seconds

Well.

Christopher Thompson

20 minutes 9 seconds20:09

Christopher Thompson 20 minutes 9 seconds

I like catching things now instead of later.

Jonathan Aulson

20 minutes 11 seconds20:11

Jonathan Aulson 20 minutes 11 seconds

Yeah, yeah. All right. All right. Thanks, guys.

Christopher Thompson

20 minutes 15 seconds20:15

Christopher Thompson 20 minutes 15 seconds

Well, thanks. Bye.

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Andrew Scheuer

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