# Introduction

Governing Body Commission (GBC) of the Hare Krishna Movement is the ultimate managing authority of the society, comprised of 10 members who are individually responsible for overseeing the administrative and spiritual standards in the centers of Hare Krishna Movement. GBC members also supervise specific projects, initiatives, and ministries. The GBC body convenes once in 3 months for their General Meeting to discuss proposals, specific issues and projects within the Hare Krishna Movement, and pass resolutions by way of a voting process. The resolutions are recorded in the minutes of the meetings and circulated to all the attendees.

## Objective

The objective is to create a web portal through which the managing authorities, secretaries and temple presidents from the centers of the Hare Krishna Movement can have access to the resolutions passed in the GBC meetings. The portal shall allow the GBC Secretariat to track the action items and ensure closure.

## High Level Requirements

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| Modules | High Level Requirements |
| [Manage](#_Introduction) Resolution | The GBC Secretariat (or authorized user from the GBC secretariat) can   * create the resolution in the portal * categorize it and * set the visibility (who can view what)   The resolutions can be tagged with center, trust, department or ministry as per applicability. In some cases, comments may be enabled.  The resolution can be edited before publishing. But once published, if the resolution is edited, the changes will be logged and it can be published only after approval.  Once in 6 months, the resolutions are marked for review. The GBC secretariat can check the resolution and see whether it is still valid.  Invalid resolutions can be taken back to the GBC forum for further discussion to pass revised resolution. |
| [Manage](#_Project_Overview) Tasks | Each resolution may give rise to one or more action items, assigned to an action owner. The action owner can view the list of action items and update the status of the same.  There may be tasks that are not connected to any specific resolution, and sometimes, the tasks may be recurring.  The GBC secretariat (or authorized user from the GBC secretariat) can view the action items, track the status and follow up with the action owners to ensure completion. |
| [Search](#_Project_Approach) Resolution | Portal users can search for a resolution   * Google-like Search (text-based search) * Advanced Search (year, month, category, tags) |
| [Manage](#_Business_Requirements_Definition) User | Administration module for user access management |

## User Stories

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| User Persona | User Stories |
| Portal Users | Search the resolution database (Google-like text based search)  Search the resolution database based on parameters (Advanced Search)  View the tasks assigned and update the status of the same |
| Secretariat | Create Resolution  Attach a Document  Categorize the Resolution  Tag the Resolution  Set Visibility of the Resolution  Edit the Resolution  Validate the Resolution  Amend the Resolution  Approve the Resolution Changes  Create a Task and assign  Create an action item for the resolution and assign  Track the status of task completion |
| Administrator | Create a new user and assign user type  Reset Password of the user  Activate or Deactivate the user  Change the role of the user (Portal User / Secretariat / Administrator) |

# Manage Resolution

## US-GBC-001: Create a resolution / proceeding

**As a** GBC Secretariat User **I want to** create a resolution or proceeding **so that** I can ensure all resolutions are recorded and available for the temple presidents and GBC members.

In the GBC meeting various topics are discussed and resolutions are passed. The meeting is conducted at regular intervals. The resolutions are updated in the portal for the users to access.

The following details are captured:

* Topic Number
* Month and the Year in which the meeting is conducted
* Preamble: a brief description about the topic being discussed
* Proposed By - Seconded By
* Resolution passed on the particular topic
* Voting: Can be passed unanimously (everyone agrees) or through voting (need to capture votes)
* Srila Prabhupada Vani citations that form the basis for the topic / resolution
* Any special note (text field to capture any special note)
* Implementation Agency (a text field to capture the implementation agency)
* Disseminate To (a text field to capture who should be informed about this resolution)

The resolution can be saved or published. Only resolutions that are published can be viewed by the portal users. Sometimes the topics are discussed but no resolutions are passed. In such case, the proceedings will be stored (there will be no resolution and no voting).

## US-GBC-002: Attach a Document

**As a** GBC Secretariat User **I want to** attach any relevant documents connected to the resolution **so that** it can be available for future reference.

The resolution / proceeding can have an attachment. Currently restrict this to a single attachment. If there are multiple files, then it can be zipped into a single file and uploaded in the site.

## US-GBC-003: Categorize the Resolution

**As a** GBC Secretariat User **I want to** categorize these resolutions **so that** it is organized and can be searched based on category.

The resolutions are assigned a particular category. The list of categories are provided by the GBC Secretariat.

The initial list contains the following categories: Secretarial, Operations, Governance, Strategical, Policy & Standards, Operational Procedures, Projects, Theological, Legal & Statutory, Land & Property, Miscellaneous.

## US-GBC-004: Tag the Resolution

**As a** GBC Secretariat User **I want to** tag the resolution with the trust, center, ministry and/or department **so that** the users can search the resolution based on tags.

Sometimes the resolutions are applicable to a specific center or a specific trust. Or it may be applicable to all the centers or all the trusts. The resolution may address the specific ministry or a department.

The resolutions can be tagged with the following:

* Specific Trust (can tag multiple trust names to a resolution)
* Specific Center (can tag multiple center names to a resolution)
* Specific Ministry
* Specific Department (ex: Deity Department, Fund Raising, Finance & Accounts etc.)

**Note:** The feature of category and tags should be used judiciously. If not done properly, this may result in wrong search results for the users. It is recommended that the multi-center tags or multi-trust tags shall be used only if the resolution is limited to those centers / trusts. If there is a chance of the resolution to become applicable to few more centers in the future, then better do not tag it. Going back to the resolutions and re-tagging them will be difficult and cumbersome.

## US-GBC-005: Set visibility of the resolution

**As a** GBC Secretariat User **I want to** set the visibility of the resolution **so that** only users who are given the visibility can view that particular resolution or proceeding.

The resolutions shall be viewed only by specific group of people as decided by the secretariat.

* **Public resolutions** are accessible to all and are also published in the website.
* **Private resolutions** are accessible to all the users who have access to the portal.
* **Restricted resolutions** are accessible only to specific type of users.
* **Confidential resolutions** get encrypted and not available for access (remains unpublished)

The following are the types of users:

* GBC - Governing Body Commissioners
* TP - Temple Presidents
* TC - Temple Commanders (who are in-charge of the ashram)
* MS - Missionaries
* CG - Congregation

## US-GBC-006: Allow / Disallow Comments

**As a** GBC Secretariat User **I want to** enable or disable comments on a particular resolution **so that** I can control whether users can comment on a particular resolution or not.

The secretary can decide whether to allow the users to write their comments on a particular resolution.

## US-GBC-007: View Resolution List

**As a** GBC Secretariat User **I want to** see the list of all the resolutions I have captured **so that** I can choose any of them and view it.

The list should display the Topic Number, Title and the status (saved / published / pending for approval etc.)

## US-GBC-008: View Resolution (for Secretariat User)

**As a** GBC Secretariat User **I want to** choose a specific resolution and view it **so that** I can verify and publish it.

The details displayed will include

* all the details captured while creating the resolution
* the category and tags attached to the resolution
* action items connected to the resolution
* amendments that happened to the resolution

## US-GBC-009: Edit the resolution

**As a** GBC Secretariat User **I want to** choose a specific resolution and edit it **so that** I can make corrections.

The secretary can edit the resolution for making any correction. However, this can happen before publishing the resolution.

## US-GBC-010: Edit a published resolution

**As a** GBC Secretariat User **I want to** edit a published resolution **so that** I can make any corrections reported.

Once published, any edits or changes to the resolution goes for approval. A copy of the old version shall be stored and made accessible (historical info).

## US-GBC-011: Approve / Reject an edit to the published resolution

**As an** approver from GBC Secretariat **I want to** approve or reject the changes made to any published resolution **so that** I can ensure that the changes are acceptable.

The approver from GBC secretariat can see both the versions of the resolution and then approve or reject the changes. Once approved, the changes are published for the portal users. If rejected, the changes are reverted back and the original version is kept intact.

## US-GBC-012: Change Resolution Settings and Tags

**As a** GBC Secretariat User **I want to** change the resolution settings **so that** I can make corrections or updates to the category, visibility settings and tags (trust, center, ministry and department).

The resolution settings also can be changed. In this case a change log can be maintained. No need for changing the version in case of changes to the settings.

## US-GBC-013: Validate the resolution

**As a** GBC Secretariat User **I want to** check the validity of the resolutions after 6 months of creating them **so that** I can present it to GBC for further discussions.

The resolutions are automatically marked for validity check after 6 months. The validity status is set to ***discuss***, which means that this need to be discussed in the GBC meeting again.

The secretariat user will get an option to

* Mark as ***valid*** and set the next validation date (snooze option)
* Mark as ***valid*** and dismiss the notification. Once dismissed the resolution will be marked as valid and will never be shown up for validity check thereafter.
* Mark as ***invalid*** and optionally provide the resolution number that invalidates this resolution. The resolutions marked as invalid will not appear in the search results thereafter.
* Mark as ***modified*** and provide the reference of resolution number that modifies this resolution. The resolutions marked as modified will not appear in the search results thereafter.

## US-GBC-014: Amend the Resolution

**As a** GBC Secretariat User **I want to** link any amendment to the past resolutions **so that** the portal user viewing an old resolution may know that there are amendments passed later on.

A resolution can be amended by resolution(s) passed later. When the user views the resolution, if there is an amendment to a resolution, it should be indicated and a link shall be available to access the amendments on that topic.

# Manage Action Items

## US-GBC-015: Create a Task

**As a** GBC Secretariat User **I want to** create a task to the portal user and assign it to them **so that** the tasks can be visible to the user for further action.

The secretariat can create a task and assign it to the action owners. Each task can have multiple action owners. The target date will be specified by the creator of the task.

**Recurrence:** A task may recur. In this case, the recurrence pattern (monthly, quarterly, yearly) is captured. The target date of the first occurrence can be specified by the creator of the task. The recurring tasks can be created automatically by the system based on the recurrence pattern. The target dates are automatically computed based on the target date for the first occurrence.

## US-GBC-016: Edit a Task

**As a** GBC Secretariat User **I want to** edit the task **so that** I can add or remove an action owner or change the recurrence or target date on the task.

Note: The task description cannot be changed.

## US-GBC-017: Track the Task Completion Status

**As a** GBC Secretariat User **I want to** view the status of the tasks assigned to the task owner **so that** I know which tasks are completed and with whom follow-up is required.

The secretariat user can view the list of all tasks and the status of the same. If the task is assigned to multiple action owners, then the user can see the status for each action owner so that he can follow up with the respective action owners to get the task completed. The secretariat user can also cancel a specific task for a specific action owner.

## US-GBC-018: View the tasks

**As a** Portal User **I want to** view all the tasks assigned to me **so that** I can act on it and complete it.

The action owner can view all the tasks assigned.

## US-GBC-019: Update Task Status

**As a** Portal User **I want to** update the status of the task as completed **so that** I can convey the status of the task to the secretariat.

Once the task is completed, the action owner can update the status of the task as completed and also update the date of completion.

Note: The action owner cannot cancel any task, but should contact the secretariat to get it canceled.

## US-GBC-020: Create an Action Item for a Resolution

**As a** GBC Secretariat User **I want to** create an action item (task) for a specific resolution **so that** I know that the task is connected to that resolution.

An action item is a task that is attached to a resolution. A resolution can have multiple action items attached to it. These action items are created along with the resolutions. When these action items are shown in the task list a link to the corresponding resolution is also provided.

## US-GBC-021: Create a Task Owner Group

**As a** GBC Secretariat User **I want to** create a task owner group **so that** I can assign the task to the group instead of individually assigning it to each member.

For example, some tasks may be assigned to all the temple presidents. So the secretariat can create a group called temple presidents with all the users who are currently acting as temple presidents. The task when assigned to this group, gets automatically assigned to the individual members in the group.

## US-GBC-022: Add / Remove members to a Task Owner Group

**As a** GBC Secretariat User **I want to** add / remove members to a task owner group **so that** I can keep the group updated.

The secretariat user can select a group and add or remove portal users. However, this will not affect the tasks that are assigned to the group earlier. For example, if I add a new temple president to the TP group, then any further tasks created will be assigned to that particular member also. But the tasks that were created earlier (before adding this user) will not get automatically assigned to this user.

# Search Resolution

## US-GBC-023: Search the Resolution (text based search)

**As a** Portal User **I want to** search the resolutions (google-like text based search) **so that** I can get the search results that are relevant to what I am looking for.

In the GBC Portal, the search user interface should allow a text based search.

* The resolutions in which the text pattern appears shall be shown in the search results page.
* The search results page displays the topic, the relevant portion of the resolution that contains the search text, the category, sub category and any tags attached to it.
* The user can click on the topic (which is a hyper link) to open the resolution and read it fully.
* Clicking on the category, sub category or the tags (which are all displayed as hyperlinks) shall display the resolutions that belong to that specific category / sub category / tag in the search results page.

The search option will not search the encrypted resolutions and the attached documents. The user will see only the resolutions for which they have got the visibility.

## US-GBC-024: Advanced Search for the Resolutions

**As a** Portal User **I want to** search the resolutions based on the categories and tags **so that** I can get the search results that are relevant to what I am looking for.

Advanced search allows the user to search with the combination of the following:

* Month & Year
* Category
* Tags (Center, Trust, Department, Ministry)

The user will see only the resolutions for which they have got the visibility.

## US-GBC-025: View Resolution (for Portal User)

**As a** Portal User **I want to** view the resolution **so that** I can go through it and give my comments (wherever applicable).

The user can click on any of the results displayed in the search results page to view the complete resolution. If the user has logged in, the user can view the comments on the resolution. Otherwise, the comments are not visible.

## US-GBC-026: Comment on the Resolution or Proceeding

**As a** Portal User **I want to** give my comments (wherever applicable) **so that** the comments are recorded.

The user can also record their comments on a specific resolution if the option to comment is enabled by the secretariat.

# Manage User

## US-GBC-027: Create user

**As an** Administrator **I want to** create a user for the portal **so that** the user can get access to the portal.

The users should have login credentials to access the portal. The following details about the users should be captured while creating the user account.

* Name
* Email id
* Login id
* Password
* Role (User, Admin, Secretariat)
* User Type (GBC, TP, TC, Missionary, Congregation)

Based on the type of user, the visibility of the resolutions are determined.

## US-GBC-028: Change User Profile

**As an** Administrator **I want to** make changes to a user profile **so that** the role changes and user type changes or changes to email id can be captured.

The user profile can be edited to

* assign a new role or change the role
* change the user type
* change the email id

## US-GBC-029: Change Password

**As a** user **I want to** change my password **so that** I can keep the access to the portal secure.

The user can change the password. The user will be asked to type the existing password and the new password. If they forgot their current password, they can request the administrator to reset the password.

## US-GBC-030: Reset Password

**As an** administrator **I want to** reset password of any user **so that** I can give them new password.

The administrator can reset the password. A mail is sent to the user with a random generated password. The user can change the password using the random password sent to his mail id.

## US-GBC-031: Activate or Deactivate User

**As an** administrator **I want to** activate or deactivate a user **so that** I can ensure that only authorized users have access to the portal.

# Log Access / Activity

## US-GBC-032: View Access / Activity Log

**As an** administrator **I want to** see the access log and activity log of all the portal users **so that** I can check them whenever required to see the footprints.

## US-GBC-033: Track Portal Access (login and logout)

**As an** administrator **I want** the system to have a log whenever a user login to the portal or logout from the portal **so that** I have a track of which user accessed the portal when.

## US-GBC-033: Log Resolution Search

**As an** administrator **I want** the system to have a log whenever a user searches for a resolution **so that** I have a track of which keywords or filter condition the users have used to search for resolutions.

## US-GBC-033: Log Resolution View

**As an** administrator **I want** the system to have a log whenever a user opens a resolution to view it **so that** I have a track of which resolutions are being viewed and by whom.

* Every time a user logs into the system a login entry is created in the log.
* Every time the user searches for a specific resolution a search entry is created in the log along with the keyword searched for or the filter conditions used for search.
* Every time the GBCS user creates a resolution or task or a task owner group a create entry is logged along with the key and type of the record created.
* Every time there is a change in the resolution settings, a log is created with the old and new value.
* Every time there is a change in the task settings, a log is created with the old and new value.
* Every time there is change in the task owner group (add / remove) a log entry is created.