# Introduction

In the GBC meeting held on June 2016, revamp of Satvata web portal was discussed.

The following resolution is passed:

*Resolved that Satvata website will be made compatible across all browser formats including mobile ones. Once this website is made functional, all initiation requests & devotee information from various temples will be routed through Satvata website only. AAD & VAKD will make the website functional in 4 months i.e., by 30th Oct 2016. GBC Society will bear the cost of designing the website. Until such time, hard copies of initiation request forms & devotee information will be sent by various temples to Krishna Sakha Dasa in Bangalore who will in turn maintain the current database updated based on the hard copies.*

This requires the Satvata portal to be revamped for

* better accessibility to the users,
* browser compatibility (Google Chrome, Mozilla Firefox and Safari) and
* responsiveness to standard screen sizes.

## Objective

To develop a responsive web portal with browser compatibility and better accessibility for capturing and maintaining the devotee profile so that the initiation requests can be routed through the portal.

## High Level Requirements

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| --- | --- |
| Modules | Requirements |
| Profile | Feature to capture the devotee details as in the existing Satvata.  Option to upload and remove profile picture of the devotee - Option to enlarge the photo - Option to upload more than one photo and choose which should be displayed in profile.  Option to take print out of devotee profiles. |
| Dashboard | Need a dashboard to see the devotees from various centers.   * Devotees who left the temple shouldn’t merge with center list. * Center list can appear Alphabetic. * Option to edit center name, address and SPOC details.   Option to generate devotee list with selective attributes (fields):  languages spoken, age, number of years in the movement, current center, center joined, qualification, ashram, and service - in alphabetical order. |
| Initiation | Feature for entering and managing the details of Krishnashraya, FOLK, Krishna Life and FOLK Circle devotees to be provided. All initiation requests & devotee information from various temples will be routed through Satvata web portal only. |
| Others | * Number of years in the movement to be displayed in profile list. * **Devotee Transfer:** Display reason and remarks. * Option to capture Devotee Training & Devotee Skills. * Option to know that a devotee has been transferred as a trainee. * Option to send mail to all devotees in one click (filter wise) * Service head and Ashram head options (filter option for this) - Since we will be using the same portal for the Krishnashraya devotees also, the terminology will be generalized as Service Coordinator and Spiritual Facilitator. * Reminders to update emergency contact numbers for devotees. |

## User Persona

|  |  |
| --- | --- |
| User Persona | User Stories |
| GBC | View a dashboard with details about the devotees of different groups in all the centers and can further browse into each center to see the list of the devotees in the center & view their profile, sadhana details, service details etc. Filter and search options to be enabled. No modification allowed. |
| TP | View a dashboard with details about the devotees of different groups in all the centers and can further browse into each center to see the list of the devotees in the center and view their profile. Sadhana, service, allowance details are not visible for other center devotees. Filter and search options to be enabled. The Temple President will have the rights to edit the details of devotees in his center. Can also recommend the devotee for 1st or 2nd initiation. |
| SPOC / TC | View the list of devotees in different groups in their own center only.  Create devotee profile, update devotee details (personal, education, work experience, contact details, id proof, documents, photos)  Can generate the devotee profile report and can also generate various reports with list of devotees based on certain parameters selected.  Can recommend a devotee for 1st or 2nd initiation by uploading the approval letter from the temple president. |
| Group Coordinator | View the list of devotees in their specific group in their center. |
| Spiritual Facilitator | Can view the list of devotees to whom he is allocated as spiritual facilitator. He can also view their complete profile and monitor their sadhana. |
| Service Coordinator | Can view the list of devotees to whom he is allocated as service coordinator. He can also view their complete profile and monitor their sadhana. |

# Devotee Profile

## Create Devotee Profile

The SPOC from each center can create a profile for the devotee. The basic information that need to be captured while creating the profile are:

* Display Name (can be changed after initiation)
* Center in which the devotee joined
* Group (Missionary or FOLK or Krishnashraya: can be changed)
* Date of Registration
* Mobile Number
* Email ID

We can also upload a Profile Photo of the devotee.

## Capture Devotee Personal Details

We have to capture the following details about the devotee:

* Legal Name
* Father’s Name
* Gender
* Blood Group
* Mother Tongue
* Highest Qualification, Institution
* Date of Birth, Place of Birth, State of Birth
* Marital Status
* Caste, Religion, Nationality

## Capture Devotee Contact Details

We need to capture

* the contact details of the devotee (or)
* in case of minors, the contact details of parents or guardian
* in case of missionaries, the emergency contact detail of parents or some relatives

Details to be captured are:

* Name of contact, Relationship (Self, in case of FOLK or Krishnashraya devotees)
* Address, City, State, Country, Pin code
* Phone Number, Mobile Number, Email ID

## Capture the details of Languages Known

It is important to capture the details of the languages that the devotee can speak, read, and / or write and devotee mother tongue. Temple Commander should be able to edit the language details if required.

## Capture Educational Background of the Devotee

We need to have an option to capture the educational background of the devotee. Starting from SSLC, multiple educational qualifications can be updated. Below are the details:

* Course
* University / Board Name
* Name of the Institution
* Year of Passing
* Marks Percentage
* Order in which it has to display

## Capture Work Experience of the Devotee

Work experience, if any, are captured with the below details:

* Company Name & Address
* Worked From
* Worked Till
* Designation
* CTC per Annum
* Reason for Leaving
* Order in which it has to display

## Update the details of Government issued ID cards

We want to capture the details of the following government issued ID cards:

* PAN card (Permanent Account Number)
* Aadhar Card (Aadhar card number)
* Voters ID (Voters ID number, Issued On, Issued From)
* Driving License (Driving License Number, Issued At, Issued On, Valid Till)
* Passport (Passport Number, Issued At, Issued On, Valid Till)

## Scan and Upload the Documents

The temple commander or SPOC can scan the documents that goes into the physical file of the devotee and upload the same, so that it can be accessed through the portal.

## Upload the photos of the Devotee

The photo of the devotee (at least 4 or 5) can be uploaded in the portal. Profile photo size & other photos size should be 10 KB & 100 KB respectively.

# Devotee Profile Views

## View Devotee List

The temple commander or SPOC can view the list of devotees in the center or group for which they are having the privilege. The list will be in the ascending order of date of joining.

The temple presidents can view the list of all the devotees in their center.

The GBC member can view the details of all the devotees in all centers.

## Filter & Export Devotee Details

The temple commander or SPOC can apply filter conditions on the list of devotees & export the devotee details. The filter conditions are applied on the following fields:

* Legal Name
* Age
* Language Spoken
* Number of years in the movement
* Current center
* Center joined
* Qualification
* Ashram
* Service

The exported file should capture the following details of the devotees.

## View Devotee Profile

If the devotee is serving or has served as a missionary serving from ashram, then the number of years in the movement should be calculated as per the devotee date of joining and displayed in devotee profile.

## Generate Devotee Profile Report

Generate a report in pdf format with all essential details about the devotee captured in the profile.

# Devotee Management

## Transfer a Devotee (Change of Center)

The devotees will be transferred form one center to another as per the service demands. The following details will be captured when the change of center is updated.

* Transferred From
* Transferred To
* Transferred On
* Reason of Transfer
* Remarks

The current center is also updated in the devotee profile.

## Change group of Congregation Devotees

The congregation devotees are grouped as Krishnashraya / FOLK. Some centers may have few other groups defined. For example, in Bangalore, we have Life Sublime and Krishna Life. Below details are captured when there is a change in the group.

* Changed From
* Changed to
* Changed On
* Remarks

## Handle Devotee joining in Ashram

A FOLK or Krishnashraya devotee may join the ashram and become a full-time missionary.

We have to capture his

* date of joining
* center in which the devotee joined
* ashrama of the devotee (brahmachari or grhasta)
* short name (optional - only for initiated devotees)

Certain modules in Satvata are enabled only if the devotee is missionary serving from ashram. Ex: Devotee Training.

## Handle Devotee leaving the Ashram

A devotee who leaves the ashram may go into any other category like Krishnashraya. We have to capture his date of leaving and the reason for leaving (optional). Also we need to identify the devotees who left the ashram and generate the list.

## Assign Services

The devotee shall be assigned various services. The following details are captured:

* Service
* Effective From
* Reporting To

The devotee can be assigned more than one service. But only one of these services can be marked as the primary service.

## Release devotee from a service

When the devotee is released from a particular service, capture the date on which he is released from the service and remarks, if any.

## Assign Service Coordinator

If the devotee is not assigned multiple services, then his reporting manager is designated as the service coordinator for the devotee. If the devotee is assigned multiple services, then we need to set one of these services as the primary service and the reporting manager of that particular service is designated as the service coordinator for the devotee.

## Assign Sadhana Facilitator

Each devotee is assigned a sadhana facilitator. The sadhana facilitator will have the privilege to view the devotee sadhana details and to generate the sadhana report of the devotee.

## Track Devotee Training

The SPOC or temple commander can update the training programs undergone by the devotee.

* Name of the Training Program
* Number of Hours
* Name of the Trainer (sometimes there can be multiple trainers)
* Completion Remarks
* Certified (Y / N)

## Track Devotee Skills

The SPOC or temple commander can update the skill set of the devotee. The following details are captured.

* Skill (Singing Kirtans, Playing Kartal, Playing Mrdanga, Playing Harmonium and so on)
* Date on which the new skill is added
* Proficiency Level (Beginner, Intermediate, Proficient, Expert)

# Devotee Initiations

## Recommend for Initiations

The devotees aspiring for initiation will take a test and then meet the Temple President. The Temple President will evaluate the candidate and then recommend him for first or second initiation. Temple commander will update the recommendation details in the portal. Below are the fields that need to be captured.

* Recommended By (name of Temple President)
* Upload the scanned image of recommendation letter.

## Generate list of devotees recommended for initiation

The GBC Secretary will generate the list of devotees from various centers who had been recommended by their Temple Presidents and are waiting for initiation. The list is then sent to the ritviks appointed by the GBC. The ritvik gives the spiritual name for the devotee. The GBC secretary will update the portal to indicate that the devotee can sit for initiation ceremony.

## Update Initiation Details

The initiation ceremony is conducted by the Temple President. Once the ceremony is completed, the Temple Commander can update

* spiritual name of the devotee
* date of initiation ceremony and
* the place where the ceremony is conducted.

## Add the name of initiated devotee in Srila Prabhupada Disciples Book

The name of the initiated devotees are automatically included in the Srila Prabhupada Disciples Book.

# Manage User

## Create user

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.

## User Profile Changes

The user profile can be edited to

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

## Change Password

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.

## Reset 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.