# 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

## US-STV-001: Create Devotee Profile

**As a** SPOC **I want to** create a devotee profile **so that** I can register them in the portal.

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.

## US-STV-002: Capture Devotee Personal Details

**As a** SPOC **I want to** capture the personal details of the devotee **so that** I can have those 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

## US-STV-003: Capture Devotee Contact Details

**As a** SPOC **I want to** capture contact details of the devotee (or an emergency contact detail of a relative in case of ashram devotees) **so that** I can contact them when required.

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

## US-STV-004: Capture the details of Languages Known

**As a** SPOC **I want to** capture linguistic skills of the devotee **so that** I can generate reports based on that.

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.

## US-STV-005: Capture Educational Background of the Devotee

**As a** SPOC **I want to** capture educational background of the devotee **so that** I know their academic background.

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

## US-STV-006: Capture Work Experience of the Devotee

**As a** SPOC **I want to** capture work experience of the devotee **so that** I know their professional background.

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

## US-STV-007: Update the details of Government issued ID cards

**As a** SPOC **I want to** capture the details of certain government issued ID cards **so that** I can have those identity proofs for our reference.

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)

## US-STV-008: Scan and Upload the Documents

**As a** SPOC **I want to** scan the documents submitted by the devotee and upload it into the portal **so that** I can have soft copy of those files stored in the server.

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.

## US-STV-009: Upload the photos of the Devotee

**As a** SPOC **I want to** upload photos of the devotee into the portal **so that** I can create an album.

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.

## US-STV-010: View Devotee List (SPOC)

**As a** SPOC **I want to** view the list of all devotees in my center & group **so that** I can see them all together and apply various filters.

Note: The list will be in the ascending order of date of joining.

The list can be filtered based on the following parameters:

* Center, Group, Category
* Date of Joining, Date of Birth

## US-STV-011: View Devotee List (TP)

**As a** Temple President **I want to** view the list of all devotees in my center **so that** I can see them all together and apply various filters.

## US-STV-012: View Devotee List (GBC)

**As a** GBC Member **I want to** view the list of all devotees in all centers **so that** I can see them all together and apply various filters.

The GBC member can view the list of the centers and in each center, they can see the number of devotees in each group and a list of all those devotees.

## US-STV-013: Filter & Export Devotee Details

**As a** SPOC **I want to** generate devotee list with various filter conditions **so that** I can cater to the requirements from management.

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.

## US-STV-014: View Devotee Profile

**As a** SPOC **I want to** view the profile of the devotee **so that** I can know more about the devotee.

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.

## US-STV-015: Generate Devotee Profile Report

**As a** SPOC **I want to** generate a profile report of devotee in pdf format **so that** I can cater to the requests from the management when they want to know the background of the devotee in more detail.

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

## US-STV-016: Transfer a Devotee (Change of Center)

**As a** SPOC **I want to** transfer a devotee to another center **so that** the other center can get access to the profile.

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.

## US-STV-017: Change group of Congregation Devotees

**As a** SPOC **I want to** change the group of a congregation devotee **so that** the respective group SPOC can get access to the profile of the devotee.

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

## US-STV-018: Handle Devotee joining in Ashram

**As a** SPOC **I want to** handle the joining formalities of a devotee joining ashram **so that** I can track certain additional information regarding the devotee joining the 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 may be enabled only if the devotee is missionary serving from ashram. Ex: Devotee Training, Sadhana Module etc.

## US-STV-019: Handle Devotee leaving the Ashram

**As a** SPOC **I want to** handle the exit formalities of a devotee leaving ashram **so that** I can track certain additional information regarding the devotee leaving the ashram and also generate reports.

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.

## US-STV-020: Assign Services

**As a** SPOC **I want to** services to the devotee **so that** I have the service details captured in portal.

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.

## US-STV-021: Release devotee from a service

**As a** SPOC **I want to** release a devotee from the service **so that** I have the service details captured in portal.

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

## US-STV-022: Assign Service Coordinator

**As a** SPOC **I want to** assign the service coordinator for a devotee **so that** I service coordinator can get access to the profile of the devotee.

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.

## US-STV-023: Assign Sadhana Facilitator

**As a** SPOC **I want to** assign the sadhana facilitator for a devotee **so that** I sadhana facilitator can get access to the profile of the devotee.

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.

## US-STV-024: Track Devotee Training

**As a** SPOC **I want to** update the details of training given to the devotee **so that** I have a track of the same.

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)

## US-STV-025: Track Devotee Skills

**As a** SPOC **I want to** update skill sets of a devotee **so that** I have the details and can assign services accordingly.

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

## US-STV-026: Recommend for Initiations

**As a** SPOC **I want to** upload initiation recommendation letters from TP for a devotee **so that** the devotee can be considered for initiation.

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.

## US-STV-027: Generate list of devotees recommended for initiation

**As a** GBC Secretary **I want to** generate list of devotees recommended for initiation **so that** ritviks can get it.

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.

## US-STV-028: Update Initiation Approvals

**As a** GBC Secretary **I want to** update the status of approval for initiation from ritviks **so that** the TP can inform the devotee accordingly to sit for initiation.

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. The spiritual name and the beads are sent through post to the respective temple presidents. The temple president can then conduct the ceremony to officially initiate the devotee on behalf of Srila Prabhupada.

## US-STV-029: Update Initiation Details

**As a** SPOC **I want to** update the spiritual name and the date of initiation of the devotee **so that** the devotee can be listed in the Srila Prabhupada’s Initiated Disciples Book.

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.

## US-STV-030: View Srila Prabhupada Disciples Book

**As a** GBC **I want to** see the Srila Prabhupada Initiated Disciples Book **so that** I know who are all initiated.

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

# Manage User

## US-STV-031: Create user

**As an** Administrator **I want to** create user **so that** the authorized users can access 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 of the user
* Email ID
* Login ID
* Password
* User Role (ADMIN / GBC / TP / SPOC / USER)

**Note:** The roles are mapped to the features (pages, buttons etc.) that the user will get access to.

## US-STV-032: Assign Center & Group

**As an** Administrator **I want to** assign a user to a center and / or group to which the user will have access to **so that** I can restrict their access to that specific center and / or group.

**Note:** The SPOC is assigned a specific center or a group. For TP, the access is given to view the profiles belonging to his center (all groups). GBC will have access to all the centers and all groups within the centers.

## US-STV-033: Change Password

**As a** user **I want to** change the password **so that** the access to the portal with my id can be secured.

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-STV-034: Reset Password

**As an** Administrator **I want to** reset the password **so that** I can give the new password to the user.

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-STV-035: Edit User Profile

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

## US-STV-036: Filter User List

**As an** Administrator **I want to** view the list of users and filter them based on role, center access & group access.

## US-GBC-037: 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.