Hakhel

Functional Specs v 1.0

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# Introduction

The Hakhel system automates sending notifications to community members about upcoming yahrzeit dates of their deceased family members. It also enables the people that are notified to select from a few possible actions to honor the yahrzeit. In this document, we refer to these communities as synagogues, and the people that administer the system as rabbis. Hakhel can accommodate any number of synagogues with their communities and rabbis. Each synagogue has its own separate resources and can have customized behavior, following a multi-tenancy model.

What follows is a description of the system and its usage.

# Overview

The main components of Hakhel are:

* A web server that sends scheduled messages to users regarding a yahrzeit via SMS, WhatsApp, or email. The message has personalized text that reminds the user of an upcoming yahrzeit and contains links for further action.
* A database with synagogues, rabbis, users, deceased people, contact people.
* A web app that facilitates:
  + Registering synagogues, rabbis, and users.
  + Collecting fees from synagogues or community members for selected services.
  + Managing the database (creating, viewing, updating, and deleting) deceased people, contact people, and other operational data.
  + Landing pages for users that click on links in the yahrzeit message. A landing page can offer further services such as saying Kaddish or visiting the grave.
  + Service flows for these further services.

In general, a rabbi can register his synagogue in Hakhel, and then import the data of deceased people and contact people from a csv file. Then the rabbi configures the system, creating a policy of when and how to send messages to community members.

Hakhel then schedules for each contact person when a notification should be sent (considering the Hebrew dates). Hakhel will, once a day, look at scheduled events and send notifications accordingly.

Users will get the notification via email or phone, and can either come to synagogue to say Kaddish, or request that Kaddish will be recited for them as a service. There can be other options.

This section describes the system from a user’s point of view. There are two types of users:

1. The rabbi that runs the system for his synagogue
2. The contact person that receives a message about a yahrzeit

## The Rabbi’s use cases

* Register himself
* Register the synagogue
* Manage (create, view, edit, and delete) notification policies
* Manage messages text.
* Manage deceased people details, via manual entry or bulk import.
* Manage contact people details, via manual entry or bulk import.
* Review and approve lists of messages that are going to be sent automatically.
* Review log of past messages and activities.

## The Contact person use cases

* Receive a notification about registration in the system
* Login and review/edit his/her details and the deceased people details.
  + Ability to opt in/out, add deceased person, add contact person for the same deceased.
* Receive a notification about a yahrzeit (via SMS, Whatsapp or email)
* Click the link in the notification
* View the personal landing page
* Select one of the options [TBD] in the landing page

# Use cases

## User login

The system presents to the user two fields:

* Username or email
* Password
* [optional] Account drop-down only if the user belongs to more than one account. The account shown as selected is the last one the user logged into.

And the links:

* Forgot password?
* Registration

If the user clicks on the Registration link, he is presented with the User Registration view.

## User Registration

The system presents to the user these fields:

* First name
* Last name
* Username
* Email
* Phone
* Password
* Password confirmation
* Account drop-down. This is only shown if there is more than one account in the system. If there are no accounts, a user will not belong to any account initially. If there is only one account, the user will automatically belong to this account, and all user data and resources will be scoped to that account.

Note:

Assigning the role of *account\_admin* to user is done by the superuser.

## Account creation and management

If a user has the role of *account\_admin*, the main view of the app will have a tab named *Accounts*. It displays a list of the accounts created and owned by this user, and ability to create, view, update and remove accounts.

When the user clicks on New Account, a form is presented with the account fields as follows:

* Name: for example, “Kfar Vradim Main Synagogue”
* Type: for example, synagogue or other types of communities like village, matnas, etc. Initially only synagogue can be selected.
* Avatar
* Contact info, including Address, email and phone for the account
* Status: can be enabled or disabled

In the future, other fields will be added to facilitate financial activities.

# System configuration

To use Hakhel, a Rabbi must do the following:

1. Register himself as a new user, and enter his details, including email and password.
2. Once registered, he should request to be granted an account\_admin role from the superuser.
3. Create an account for the synagogue with the synagogue details.
4. Enter the details of deceased people and their contact people that he wants to notify via the Hakhel system. This data entry can be done in two ways:
   1. Importing a csv file with all the necessary details
   2. Entering data of deceased people and their contact people via the Hakhel UI.

Note: all contact people will become users in the system. Their username will be their first name dot last name. Their password will be their phone number initially. They will belong to the current account (account belonging to user that enters them or runs the import)

1. Create a notification policy. Notification policies control the timing and method of sending yahrzeit notifications. For example, a policy can say that the contact person of a deceased should receive a yahrzeit notification 4 days before the yahrzeit, at 17:00 PM, via SMS message. When a Rabbi updates or changes such a policy, all the scheduled sending of notifications that use that policy will be recalculated accordingly to reflect the new policy. When going to update a policy, the UI should say how many events are currently scheduled that use that policy.
2. Review and if necessary, update the notification messages text.
3. After the Rabbi enters the data for each deceased person and at least one contact person, Hakhel will calculate:
   1. The yahrzeit date (according to Hebrew calendar)
   2. The notification date (according to policies set by the rabbi)
   3. The recipient

and add a yahrzeit notification to Hakhel’s operations calendar. The details of this new scheduled event will be visible on the UI upon saving the deceased person or contact person details.