ARP

1. Product Workflow

Platform Admin → Tenant Admin → Tenant User Admin → Workspace Project Manager → Module Roles (ScripGen Editor / Viewer)

Platform Setup (Pre-Research)
Persona: Platform Admin

Actions:
- Creates client tenant
- Configures IAM, roles, security
- Enables ARP modules (ScripGen, D2I, etc.)

System Outcome: Tenant ready for use

STEP 1: Tenant & Workspace Setup
Persona: Tenant Admin
Actions:
- Manages tenant configuration
- Creates workspaces (e.g., India – Stagwell)
- Adds users and assigns roles
- Handles billing

System Outcome: Workspace ready for research execution

STEP 2: Access Control & User Management
Persona: Tenant User Admin
Actions:
- Assigns/removes user roles
- Supports onboarding/offboarding

System Outcome: Correct users have correct access

STEP 3: Business Need Identification

Persona: Workspace Project Manager

Actions:

- Engages business stakeholders
- Defines business objective
  (e.g., launch a new vehicle)

System Outcome: Business need documented

STEP 4: Business Need → Research Problem

Persona: Workspace Project Manager + ScripGen Editor

Actions:

- Breaks business need into research questions
- Chooses research methodology

System Outcome: Research problem clearly defined

STEP 5: Questionnaire Development

Persona: ScripGen Editor

Actions:

- Creates questionnaire document
- Defines objectives, questions, flow

System Outcome: Questionnaire document ready

STEP 6: Sample Design & Quota Planning

Persona: ScripGen Editor

Actions:

- Defines target population
- Sets sample size & proportions
- Configures soft/hard quotas

System Outcome: Sample & quota logic finalized

STEP 7: Questionnaire → Survey Script (ScriptGen)

Persona: ScripGen Editor

Actions:

- Uploads questionnaire into ScripGen
- Converts it into executable survey script
- Applies logic, branching, quotas

System Outcome: Survey script generated

STEP 8: Script Review & Validation
Persona: ScripGen Viewer
Actions:
- Reviews script
- Validates structure & logic
- Shares feedback (read-only)

System Outcome: Script approved for launch

STEP 9: Survey Launch & Data Collection
Persona: Workspace Project Manager
Actions:
- Launches survey
- Monitors response count & quota progress

System Outcome: Data collection in progress

STEP 10: Field & Sample Management
Persona: Workspace Project Manager
Actions:
- Tracks quotas
- Takes corrective actions if needed

System Outcome: Balanced & representative dataset

STEP 11: Verbatim & Open-Text Analysis
Persona: Workspace Project Manager
Actions:
- Uses Open Text Analyzer
- Reviews verbatims & sentiments

System Outcome: Qualitative insights extracted
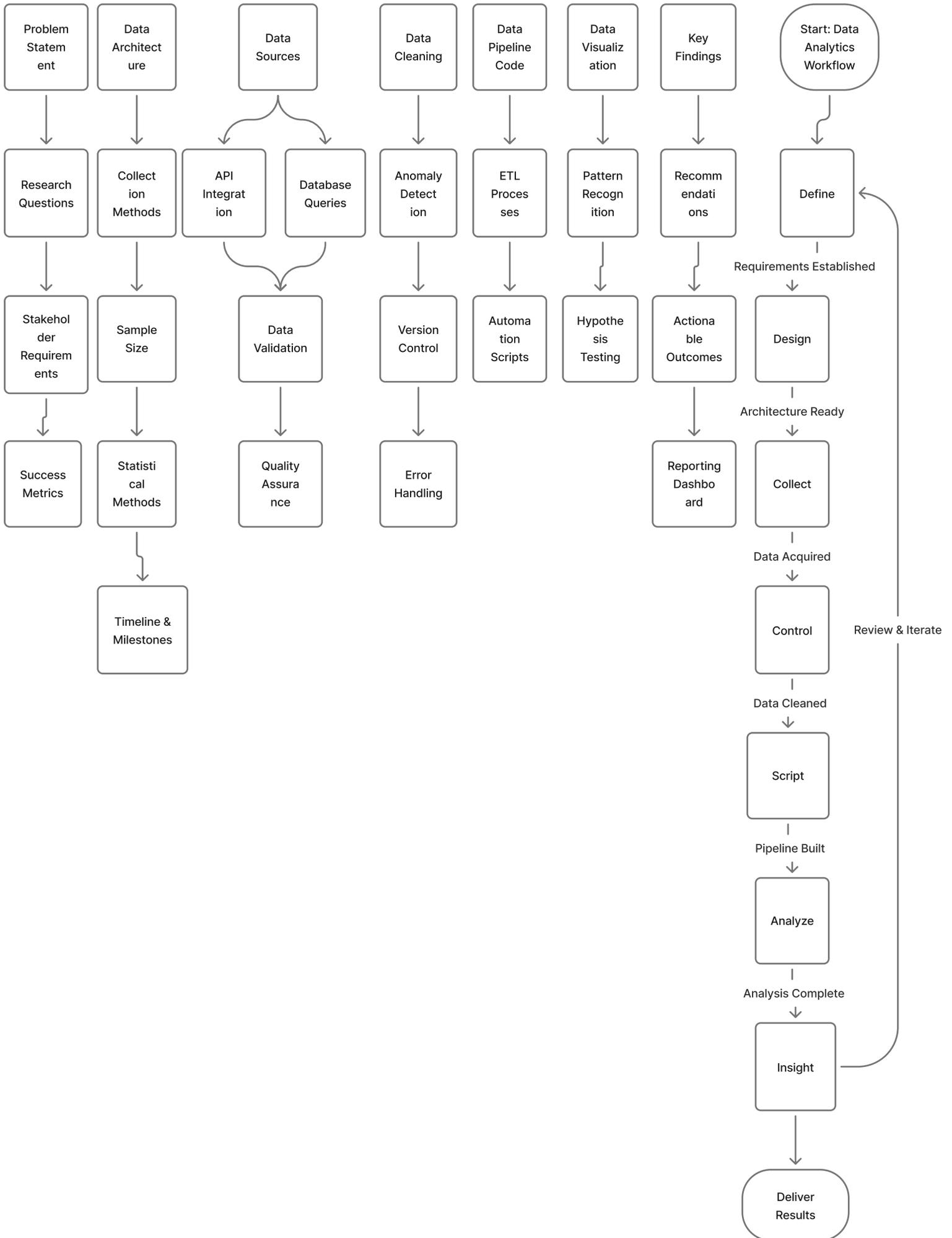

STEP 12: Data → Insights
Persona: Workspace Project Manager
Actions:
- Analyzes quantitative + qualitative data
- Converts findings into insights

Final Outcome: Data-backed business decisions

Flow Chart

```
Problem          Data                          Data            Data            Data            Data            Key         ╭─────────────╮
Statement        Architecture     Data         Cleaning        Pipeline        Visualization   Findings        │ Start: Data │
                                  Sources                       Code                                            │ Analytics   │
                                                                                                                │ Workflow    │
                                                                                                                ╰─────────────╯
     │                │              │  ╲  ╱  │      │               │               │               │                │
     ▼                ▼              ▼         ▼      ▼               ▼               ▼               ▼                ▼
Research         Collection      API      Database   Anomaly        ETL             Pattern         Recommend     Define
Questions        Methods         Integration Queries Detection      Processes       Recognition     ations
     │                │              ╲       ╱          │               │               │               │               │
     ▼                ▼               ▼                  ▼               ▼               ▼               ▼         Requirements Established
Stakeholder      Sample          Data Validation    Version         Automation      Hypothesis      Actionable       ▼
Requirements     Size                               Control         Scripts         Testing         Outcomes     Design
     │                │                  │              │               │               │               │               │
     ▼                ▼                  ▼              ▼                                               ▼         Architecture Ready
Success          Statistical     Quality         Error                                          Reporting          ▼
Metrics          Methods         Assurance       Handling                                       Dashboard      Collect
                      │                                                                                             │
                      ▼                                                                                         Data Acquired
                 Timeline &                                                                                         ▼
                 Milestones                                                                                    Control
                                                                                                                   │
                                                                                                              Data Cleaned
                                                                                                                   ▼
                                                                                                              Script
                                                                                                                   │
                                                                                                              Pipeline Built
                                                                                                                   ▼
                                                                                                              Analyze
                                                                                                                   │
                                                                                                              Analysis Complete
                                                                                                                   ▼
                                                                                                              Insight ──── Review & Iterate
                                                                                                                   │
                                                                                                                   ▼
                                                                                                              ╭─────────╮
                                                                                                              │ Deliver │
                                                                                                              │ Results │
                                                                                                              ╰─────────╯
```

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Hierarchy

Platform Admin → Tenant Admin → Workspace Project Manager → Module Users (Editor / Viewer)

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1. Platform Admin

Role Summary

Owns and operates the entire ARP platform at a global level.

Core Responsibilities

- Create, configure, and manage tenants (clients)
- Define and manage global roles & permissions
- Manage platform settings (security, access, integrations)
- Monitor audit logs, usage, and system health
- Handle onboarding of new enterprise clients

Permissions

✅ Create / manage tenants

✅ Create / manage users across tenants

✅ Define roles & access policies (IAM)

✅ View audit logs & system-level analytics

❌ Cannot access **client-specific workspaces, projects, or research data**

Primary Goals

- Ensure platform stability and security
- Enable smooth onboarding of new clients
- Maintain compliance and governance

Typical Persona

Platform Ops, IT Admin, SaaS Operations Lead

2. Tenant Admin

Role Summary

Owns one client tenant (e.g., Stagwell, Google) and manages everything inside that tenant, except research execution.

Core Responsibilities

- Manage tenant-level users and roles
- Create and manage workspaces
- Handle billing and subscriptions
- Organize teams by department, region, or function

Permissions

✓ Create / manage workspaces

✓ Assign roles within tenant

✓ Define roles & access policies (IAM)

✓ View tenant-level configuration

✗ Cannot access module-level research data (ScripGen, D2I)

Primary Goals

- Structure teams efficiently
- Control access and costs
- Enable research teams to operate independently

Typical Persona

Client IT Admin, Ops Manager, Enterprise Admin

3. Tenant User Admin

Role Summary

Supports user access management within a tenant without operational or billing control.

Core Responsibilities

- Assign and remove user roles
- Support onboarding/offboarding of users
- Ensure correct access permissions

Permissions

- ✅ Assign/remove user roles
- ✅ Manage user access
- ❌ Cannot create workspaces
- ❌ Cannot access billing
- ❌ Cannot access research or project data

Primary Goals

- Maintain correct access hygiene
- Reduce admin overhead for Tenant Admin

Typical Persona

Tech Support, Admin Assistant

4. Workspace Project Manager

Role Summary

Owns delivery and execution inside a workspace.

Core Responsibilities

- Create, edit, and delete projects
- Control access to modules (ScripGen, D2I, etc.)
- Manage project timelines and outputs
- Ensure insights delivery

Permissions

✅ Full control over workspace projects

✅ Enable/disable modules per project

✅ Manage project-level access

❌ Cannot manage tenant billing or global users

Primary Goals

- Deliver research projects on time
- Coordinate researchers and analysts
- Ensure quality insights

Typical Persona

Research Lead, Project Manager

5. ScriptGen Editor

Role Summary
Executes survey scripting work within the ScripGen module

Core Responsibilities

- Upload questionnaire documents
- Convert questionnaires into survey scripts
- Review, edit, and validate scripts
- Apply logic, branching, and quotas

Permissions

- ✓ Upload questionnaires
- ✓ Create and edit scripts in ScripGen
- ✗ Cannot manage users or roles
- ✗ Cannot change workspace or project setting

Primary Goals

- Build accurate, error-free survey scripts
- Ensure research intent is correctly implemented

Typical Persona

Researcher, Script Writer

6. ScriptGen Viewer

Role Summary

Has read-only visibility into survey scripts for review and approval.

Core Responsibilities

- Review scripts for accuracy and alignment
- Provide feedback externally (offline)

Permissions

✅ View scripts

❌ Cannot upload, edit, or delete content

❌ Cannot manage users or settings

Primary Goals

- Validate research design
- Approve scripts before launch

Typical Persona

Senior Research Manager, QA Reviewer

3. Access Control Table

Capability / Feature	Platform Admin	Tenant Admin	Tenant User Admin	Workspace PM	ScripGen Editor	ScripGen Viewer
Platform Settings (Global)	✓	✗	✗	✗	✗	✗
Tenant Creation & Management	✓	✗	✗	✗	✗	✗
Tenant Configuration	🔒	✓	✗	✗	✗	✗
Billing & Subscription	🔒	✓	✗	✗	✗	✗
Workspace Creation	✗	✓	✗	✗	✗	✗
Workspace Configuration	✗	🔒	✗	✓	✗	✗
Project Creation / Deletion	✗	✗	✗	✓	✗	✗
Project Management	✗	✗	✗	✓	🔒	🔒
Module Access Control (ScripGen, D2I)	✗	✗	✗	✓	✗	✗
User Creation (Tenant Level)	🔒	✓	✗	✗	✗	✗
User Role Assignment	🔒	✓	✓	🔒	✗	✗
Audit Logs (Platform)	✓	✗	✗	✗	✗	✗
Audit Logs (Tenant)	🔒	✓	✗	✗	✗	✗
Access Research Data	✗	✗	✗	✓	🔒	🔒
Upload Questionnaire	✗	✗	✗	✗	✓	✗
Edit Survey Script (ScripGen)	✗	✗	✗	✗	✓	✗
View Survey Script	✗	✗	✗	🔒	🔒	✓
Configure Sample	✗	✗	✗	🔒	✓	✗
Data → Insights (D2I)	✗	✗	✗	✓	✗	✗

✓ Full Access   🔒 Restricted / View Only   ✗ No Access

4. Role-Based Access Control Table Heatmap

1. Platform & Tenant Control

Capability / Feature	Platform Admin	Tenant Admin	Tenant User Admin	Workspace PM	ScripGen Editor	ScripGen Viewer
Platform Settings	✅	❌	❌	❌	❌	❌
Tenant Creation	✅	❌	❌	❌	❌	❌
Tenant Configuration	🔒	✅	❌	❌	❌	❌
Billing & Subscription	🔒	✅	❌	❌	❌	❌
Audit Logs (Platform)	✅	❌	❌	❌	❌	❌
Audit Logs (Tenant)	🔒	✅	❌	❌	❌	❌

2. Workspace & Project Control

Capability / Feature	Platform Admin	Tenant Admin	Tenant User Admin	Workspace PM	ScripGen Editor	ScripGen Viewer
Workspace Creation	❌	✅	❌	❌	❌	❌
Workspace Configuration	❌	🔒	❌	✅	❌	❌
Project Creation / Delete	🔒	✅	❌	✅	❌	❌
Project Management	❌	❌	❌	✅	👓	👓
Module Enablement	❌	❌	❌	✅	❌	❌

✅ Full Access   🔒 Limited / Contextual Access   ❌ No Access   👓 Read-Only

3. User & Access Management

Capability / Feature	Platform Admin	Tenant Admin	Tenant User Admin	Workspace PM	ScripGen Editor	ScripGen Viewer
User Creation (Tenant)	🔒 Limited	✅ Full	❌ No	❌ No	❌ No	❌ No
Role Assignment	🔒 Limited	✅ Full	✅ Full	🔒 Limited	❌ No	❌ No

4. Research Execution – ScripGen

Capability / Feature	Platform Admin	Tenant Admin	Tenant User Admin	Workspace PM	ScripGen Editor	ScripGen Viewer
Upload Questionnaire	❌ No	❌ No	❌ No	❌ No	✅ Full	❌ No
Edit Survey Script	❌ No	❌ No	❌ No	❌ No	✅ Full	❌ No
View Survey Script	❌ No	❌ No	❌ No	👓 Read-Only	👓 Read-Only	✅ Full
Configure Sample	❌ No	❌ No	❌ No	👓 Read-Only	✅ Full	❌ No

5. Data Collection & Insights

Capability / Feature	Platform Admin	Tenant Admin	Tenant User Admin	Workspace PM	ScripGen Editor	ScripGen Viewer
Launch Survey	❌ No	❌ No	❌ No	✅ Full	❌ No	❌ No
Field Monitoring	❌ No	❌ No	❌ No	✅ Full	👓 Read-Only	❌ No
Open-Text Analysis	❌ No	❌ No	❌ No	✅ Full	👓 Read-Only	❌ No
D2I	❌ No	❌ No	❌ No	✅ Full	❌ No	❌ No

✅ Full Access   🔒 Limited / Contextual Access   ❌ No Access   👓 Read-Only

5. Test Case

1. RBAC & access control

Scenario	Role	Steps	Expected Result	Type
Access ScriptGen without permission	Tenant Admin	Open Project → ScriptGen	Access denied message shown	RBAC
Viewer tries to edit script	ScripGen Viewer	Open script → Click Edit	Edit blocked, read-only UI	RBAC
Editor tries to launch survey	ScripGen Editor	Open project → Launch survey	Launch disabled	RBAC
PM accesses D2I	Workspace PM	Open Project → D2I	D2I dashboard loads	Functional
Platform Admin tries to access project	Platform Admin	Open tenant project	Access blocked	RBAC
Role changed mid-session	Any	Change role → continue action	Forced refresh + revalidation	System

2. Scriptgen – questionnaire & script

Scenario	Role	Steps	Expected Result	Type
Upload valid questionnaire	ScripGen Editor	Upload valid file	Script draft created	Functional
Upload invalid format	ScripGen Editor	Upload unsupported file	Upload rejected with error	Negative
Missing mandatory questions	ScripGen Editor	Upload incomplete doc	Validation error shown	Negative
Create skip logic	ScripGen Editor	Add logic → save	Logic saved successfully	Functional
Circular logic	ScripGen Editor	Create circular rule	Save blocked, error highlighted	Negative
Edit script in review	ScripGen Editor	Submit → Try edit	Fields locked	RBAC
Viewer opens script	ScripGen Viewer	Open script	Read-only mode	Functional

3. Scriptgen – sample & quotas

Scenario	Role	Steps	Expected Result	Type
Valid quota setup	ScripGen Editor	Configure quotas → save	Quotas saved	Functional
Quota total ≠ sample size	ScripGen Editor	Enter mismatched values	Save blocked	Negative
Zero / negative quota	ScripGen Editor	Enter 0 or -1	Validation error	Negative
Overlapping quotas	ScripGen Editor	Configure overlapping	Error highlighted	Negative
PM views quotas	Workspace PM	Open quota screen	View-only access	RBAC

4. Script review & approval

Scenario	Role	Steps	Expected Result	Type
Submit script for review	ScripGen Editor	Submit	Status → In Review	Functional
Approve script	Workspace PM	Review → Approve	Status → Approved	Functional
Reject script	Workspace PM	Review → Reject	Returned to Draft	Functional
Launch without approval	Workspace PM	Try launch	Launch blocked	Negative

5. Field & data collection

Scenario	Role	Steps	Expected Result	Type
Launch approved survey	Workspace PM	Launch	Survey live	Functional
Quota filled mid-survey	System	Respondent enters	Survey terminates gracefully	System
High drop-off detection	System	Monitor field	Warning shown to PM	System

6. D2I – data access & analysis

Scenario	Role	Steps	Expected Result	Type
Access D2I before field close	Workspace PM	Open D2I	Analysis blocked with message	Negative
Open D2I after field close	Workspace PM	Open D2I	Dashboard loads	Functional
Run quantitative analysis	Workspace PM	Apply filters	Charts generated	Functional
Invalid crosstab variables	Workspace PM	Select invalid vars	Error shown	Negative
Verbatim clustering fails	System	Run NLP	Fallback to raw data	System

7. Insight management

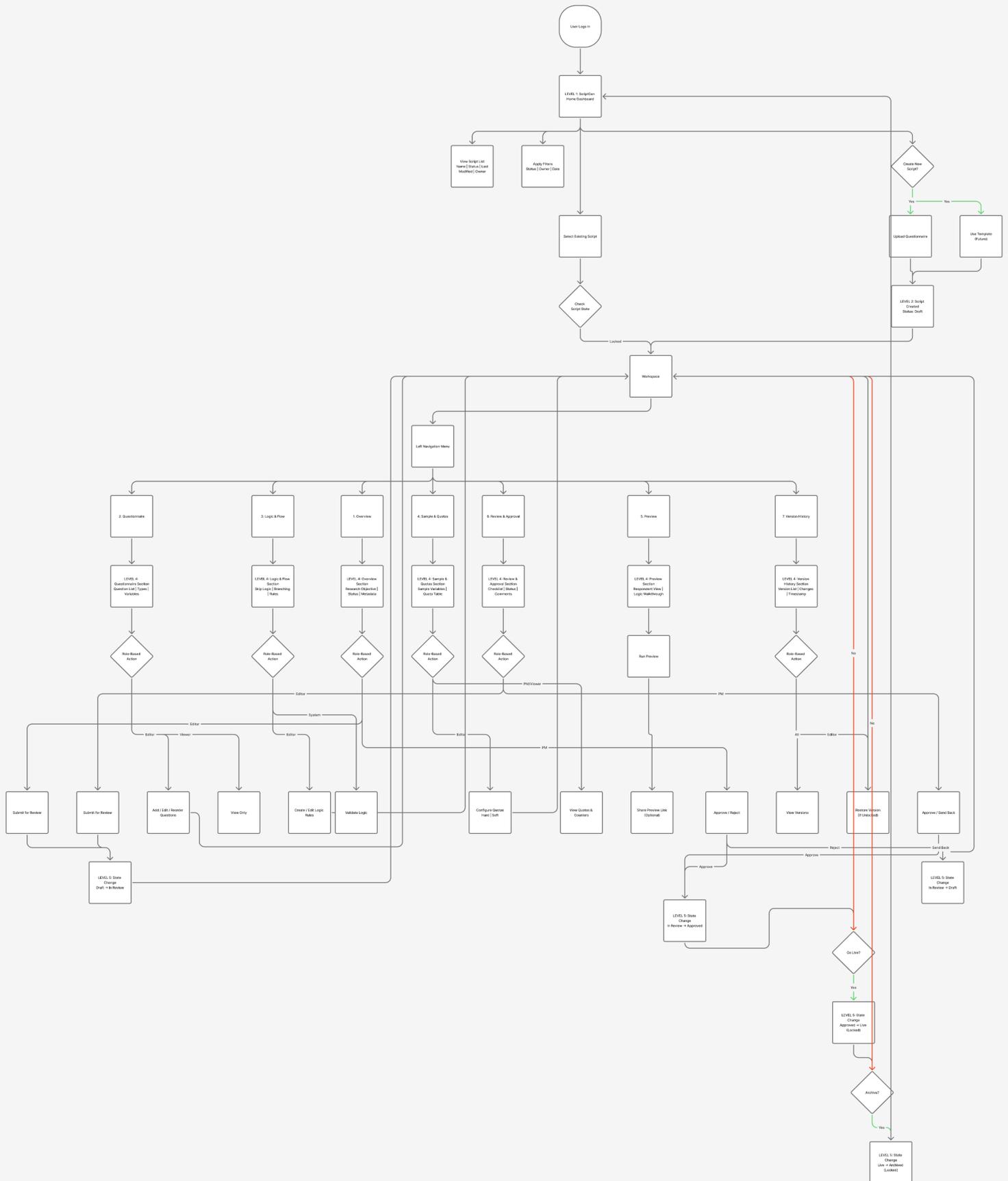| Scenario	Role	Steps	Expected Result	Type
Create insight draft	Workspace PM	Create insight	Saved as Draft	Functional
Finalize without evidence	Workspace PM	Mark Final	Warning shown	Negative
Finalize valid insight	Workspace PM	Add evidence → Finalize	Status → Final	Functional
Edit finalized insight	Workspace PM	Try edit	Edit blocked	RBAC

8. System & reliability

Scenario	Role	Steps	Expected Result	Type
Network loss during save	Any	Disconnect mid-save	Auto-save locally	System
Retry after reconnect	Any	Reconnect	Draft synced	System
Large dataset processing	Workspace PM	Run analysis	Progress indicator shown	System

6. User Journey

Journey Stage	User Goal	User Actions	Personas	Pain Points	System Support Features
Setup	Platform ready for research	Tenant & roles configured	Platform Admin, Tenant Admin	Wrong role setup blocks progress	RBAC enforcement, audit logs
Project Initiation	Create project space	Create workspace & project,assignrole	Tenant Admin, Workspace PM	Access confusion	Clear role boundaries
Script Creation	Build survey	Uploadquestionnaire, define logic	ScripGen Editor	Logic conflicts, quota errors	Real-time validation, versioning
Review & Approval	Validate survey	Review script, approve/reject	ScripGen Viewer, Workspace PM	Late feedback, rework	Script locking, status states
Data Collection	Collect valid data	Launch survey, monitor quotas	Workspace PM, System	Drop-offs, quota exhaustion	Quota enforcement, alerts
Analysis (D2I)	Understand data	Run analysis, crosstabs	Workspace PM	Data overload	Guided analysis, NLP
Insight Creation	Generate insights	Write insights, attach evidence	Workspace PM	Weak insights	Insight builder, traceability
Delivery & Decision	Enable decisions	Export & share insights	Workspace PM,	Trust & clarity	Locked insights, exports

Script Gen A

User Logs In

LEVEL 1: ScriptGen Home Dashboard

View Script List
Name | Status | Last Modified | Owner

Apply Filters
Status | Owner | Date

Create New Script?

Select Existing Script

Upload Questionnaire

Use Template
(Future)

Check Script State

LEVEL 2: Script Created
Status: Draft

Locked

Workspace

Left Navigation Menu

2. Questionnaire | 3. Logic & Flow | 1. Overview | 4. Sample & Quotas | 6. Review & Approval | 5. Preview | 7. Version History

LEVEL 4: Questionnaire Section
Question List | Types | Variables

LEVEL 4: Logic & Flow Section
Skip Logic | Branching | Rules

LEVEL 4: Overview Section
Research Objective | Status | Metadata

LEVEL 4: Sample & Quotas Section
Sample Variables | Quota Table

LEVEL 4: Review & Approval Section
Checklist | Status | Comments

LEVEL 4: Preview Section
Respondent View | Logic Walkthrough

LEVEL 4: Version History Section
Version List | Changes | Timestamp

Role-Based Action

Run Preview

Editor

PM/Viewer

PM

System

Editor

Editor | Viewer | Editor | Editor | PM | All | Editor

No

Submit for Review | Submit for Review | Add / Edit / Reorder Questions | View Only | Create / Edit Logic Rules | Validate Logic | Configure Quotas Hard | Soft | View Quotas & Counters | Share Preview Link (Optional) | Approve / Reject | View Versions | Restore Version (If Unlocked) | Approve / Send Back

LEVEL 5: State Change
Draft → In Review

Reject | Approve | Send Back

LEVEL 5: State Change
In Review → Approved

LEVEL 5: State Change
In Review → Draft

Go Live?

Yes

LEVEL 5: State Change
Approved → Live (Locked)

Archive?

Yes

LEVEL 5: State Change
Live → Archived (Locked)

8. ScriptGen User Flows

Upload → Script → Logic → Quotas → Review → Approval → Lock

Preconditions
Persona: Workspace Project Manager

System State:
- Workspace exists
- Project exists
- ScriptGen module is enabled for the project
- ScripGen Editor & Viewer are assigned

STEP 1: Access ScriptGen Module
Persona: ScripGen Editor
Actions:
- Logs into ARP
- Navigates:
    Tenant → Workspace → Project → ScriptGen

System Action:
- Validates role permissions
- Loads ScriptGen dashboard

STEP 2: Upload Questionnaire Document
Persona: ScripGen Editor
Actions:
- Uploads questionnaire document
    - Research objectives
    - Structured questions
    - Question order

System Action:
- Parses document
- Creates draft script structure

STEP 3: Create Survey Script

Persona: ScripGen Editor

Actions:

- Converts questionnaire into survey script
- Defines:
  - Question logic
  - Branching
  - Skip patterns

System Action:

- Saves script in editable state
- Version control enabled

STEP 4: Configure Sample & Quotas

Persona: ScripGen Editor

Actions:

- Defines sample variables (e.g., brand ownership)
- Sets quotas:
  - Hard quota
  - Soft quota
- Sets counters per segment

System Action:

- Applies quota logic
- Validates proportional consistency

STEP 5: Internal Script Review

Persona: ScripGen Editor

Actions:

- Self-reviews script
- Fixes logic or wording issues

System Action:

- Allows preview mode
- Logs version changes

STEP 6: Submit Script for Review
Persona: ScripGen Editor
Actions:

- Submits script for review

System Action:

- Locks editing (read-only)
- Notifies ScripGen Viewer(s)

STEP 7: Review Script (Read-Only)
Persona: ScripGen Viewer
Actions:

- Opens ScriptGen
- Reviews:
    - Question flow
    - Logic
    - Quotas (view-only)

System Action:

- Prevents edits
- Tracks review status

STEP 8: Script Approval & Unlock
Persona: Workspace Project Manager
Actions:

- Reviews approval status
- Confirms readiness

System Action:

- Unlocks script for launch
- Flags script as "Approved"

---

10. D2I – User Flows

Data → Analyze → Interpret → Insight → Decision

Preconditions
Persona: Workspace Project Manager

System State:
- Survey is completed
- Data is collected & cleaned
- Script is locked
- D2I module is enabled for the project

STEP 1: Access D2I Module
Persona: Workspace Project Manager
Actions:
- Navigates:
    Tenant → Workspace → Project → D2I

System Action:
- Validates access
- Loads D2I dashboard

STEP 2: Data Ingestion & Overview
Persona: System (Automated)
Actions:
- Ingests:
    - Quantitative survey data
    - Open-ended responses (verbatims)
- Performs:
    - Basic validation
    - Structuring & indexing

UI Shown to User:
- Total responses
- Completion status
- Variable list

STEP 3: Choose Analysis Type
Persona: Workspace Project Manager
Actions:
- Selects analysis path:
  - Quantitative analysis
  - Verbatim / open-text analysis
  - Combined view

System Action:
- Loads relevant analysis tools

STEP 4: Quantitative Analysis
Persona: Workspace Project Manager
Actions:
- Applies filters (brand, segment, demographics)
- Runs:
  - Crosstabs
  - Comparisons
  - Trends

System Action:
- Generates tables & charts
- Ensures statistical consistency

STEP 5: Open-Text Analysis
Persona: Workspace Project Manager
Actions:
- Opens Open-Text Analyzer
- Reviews:
  - Key themes
  - Sentiments
  - High-frequency terms

System Action:
- Clusters verbatims
- Highlights patterns & anomalies

STEP 6: Insight Creation

Persona: Workspace Project Manager

Actions:

- Interprets findings
- Writes insight statements
- Tags insights to:
  - Business questions
  - Research objectives

System Action:

- Saves insights
- Links insights to underlying data

STEP 7: Insight Validation

Persona: Workspace Project Manager

Actions:

- Reviews insight accuracy
- Cross-checks with data points

System Action:

- Maintains traceability (Insight → Data)

STEP 8: Insight Finalization

Persona: Workspace Project Manager

Actions:

- Marks insights as final
- Prepares for reporting / decision making

System Action:

- Locks insights (optional)
- Enables export & sharing

---

11. Source File Links