

Role Definitions & Workflow

Role Hierarchy

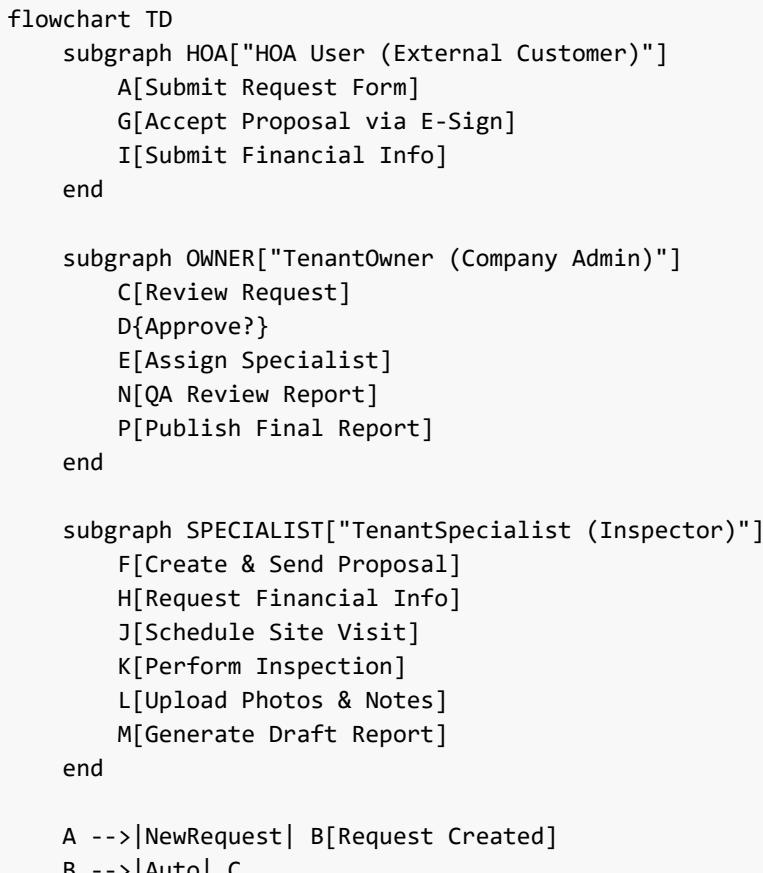
Scope	Role	Policy	Description
Platform	PlatformAdmin	RequirePlatformAdmin	SaaS owner, can access all tenants
Platform	PlatformSupport	-	Limited global read/support (optional)
Tenant	TenantOwner	RequireTenantOwner	Company admin, reviews requests, assigns specialists, publishes reports
Tenant	TenantSpecialist	RequireTenantStaff	Performs inspections, creates proposals, drafts reports
Tenant	TenantViewer	RequireTenantViewer	Read-only internal staff
External	HOAUser	RequireHOAUser	HOA board member, submits requests, accepts proposals
External	HOAAuditor	RequireHOAUser	Read-only access for compliance review

Who is "Staff"?

"Staff" = TenantOwner + TenantSpecialist

These are internal employees of the reserve study company (tenant). The **RequireTenantStaff** policy allows access to both roles.

Reserve Study Workflow - Who Does What



```

C --> D
D -->|Yes| E
D -->|No, NeedsInfo| A
E -->|Assigned| F
F -->|ProposalPendingESign| G
G -->|Accepted| H
H --> I
I -->|UnderReview| J
J -->|Scheduled| K
K -->|InProgress| L
L --> M
M -->|ReportDrafted| N
N -->|ApprovedReport| P
P -->|Complete| Q[Study Complete]

```

Workflow Status Transitions by Role

From Status	To Status	Who Can Do This	Action
NewRequest	PendingDetails	System	Auto when elements added
PendingDetails	ReadyForReview	System	Auto when all data complete
ReadyForReview	Approved	TenantOwner	Reviews & approves request
ReadyForReview	NeedsInfo	TenantOwner	Requests more info from HOA
NeedsInfo	ReadyForReview	HOAUser	Provides requested info
Approved	Assigned	TenantOwner	Assigns a specialist
Assigned	ProposalPendingESign	TenantSpecialist	Creates & sends proposal
ProposalPendingESign	Accepted	HOAUser	E-signs the proposal
ProposalPendingESign	Rejected	HOAUser	Rejects proposal
Accepted	Scheduled	TenantSpecialist	Schedules site visit
Scheduled	InProgress	TenantSpecialist	Starts inspection
InProgress	UnderReview	TenantSpecialist	Uploads data
UnderReview	ReportDrafted	TenantSpecialist	Generates report
ReportDrafted	ApprovedReport	TenantOwner	QA approves report
ApprovedReport	Complete	TenantOwner	Publishes to HOA
Complete	Archived	System	Auto after time period

Data Model

```

erDiagram
    TENANT {
        int TenantId PK
        string Name
        string Subdomain
        string SubscriptionTierId
    }

```

```
}

APPLICATIONUSER {
    guid UserId PK
    string Email
    string FirstName
    string LastName
}

ROLE {
    guid RoleId PK
    string Name
    string Scope "Platform|Tenant|External"
}

USERROLEASSIGNMENT {
    guid UserRoleAssignmentId PK
    guid UserId FK
    guid RoleId FK
    int TenantId FK "null for Platform roles"
}

COMMUNITY {
    guid CommunityId PK
    int TenantId FK
    string Name
    string Address
}

RESERVESTUDY {
    guid ReserveStudyId PK
    int TenantId FK
    guid CommunityId FK
    guid ApplicationUserId FK "HOA user who submitted"
    guid SpecialistUserId FK "Assigned specialist"
    int Status
}

STUDYREQUEST {
    guid Id PK "Same as ReserveStudyId"
    int TenantId FK
    int CurrentStatus "Engine status enum"
}

PROPOSAL {
    guid ProposalId PK
    guid ReserveStudyId FK
    decimal EstimatedCost
    datetime DateSent
    datetime DateApproved
}

REPORT {
    guid ReportId PK
    guid ReserveStudyId FK
    bool IsPublishedToClient
    datetime PublishedAt
}

TENANT ||--o{ COMMUNITY : has
```

```

TENANT ||--o{ USERROLEASSIGNMENT : scopes
COMMUNITY ||--o{ RESERVESTUDY : has
RESERVESTUDY ||--|| STUDYREQUEST : "1:1 workflow"
RESERVESTUDY ||--o| PROPOSAL : has
RESERVESTUDY ||--o{ REPORT : has

APPLICATIONUSER ||--o{ USERROLEASSIGNMENT : has
APPLICATIONUSER ||--o{ RESERVESTUDY : submits
APPLICATIONUSER ||--o{ RESERVESTUDY : assigned_to

ROLE ||--o{ USERROLEASSIGNMENT : defines

```

Page Access by Role

Page/Feature	PlatformAdmin	TenantOwner	TenantSpecialist	TenantViewer	HOAUser
/Admin/*	✓	✗	✗	✗	✗
/ReserveStudies/Create	✓	✓	✓	✗	✗
/ReserveStudies/Request	✓	✓	✓	✗	✓
/ReserveStudies/{id}/Details	✓	✓	✓	✓	✓*
Assign Specialist	✓	✓	✗	✗	✗
Send Proposal	✓	✓	✓	✗	✗
Accept Proposal	✗	✗	✗	✗	✓
Upload Photos/Notes	✓	✓	✓	✗	✗
Approve Report (QA)	✓	✓	✗	✗	✗
Publish Report	✓	✓	✗	✗	✗
Download Final Report	✓	✓	✓	✓	✓

* HOAUser can only see their own studies

Summary: The Three User Types

1. HOA Users (External Customers)

- Submit reserve study requests
- Accept proposals (e-signature)
- Provide financial information
- Download final reports
- **Cannot** assign specialists, create proposals, or approve reports

2. Tenant Staff (Reserve Study Company Employees)

- **TenantOwner**: Reviews requests, assigns specialists, QA approves reports, publishes
- **TenantSpecialist**: Creates proposals, performs inspections, drafts reports
- **TenantViewer**: Read-only access to studies

3. Platform Admin (SaaS Owner - You)

- Full access to all tenants
- Manages subscriptions, tenants, global settings