Project Status Recap

Project: Superscapes Financial Intelligence Dashboard **Generated:** October 31, 2025 **Report Period:** October 26, 2025 - October 31, 2025

Executive Summary

The Superscapes Financial Intelligence Dashboard is a web-based analytics platform that enables business users to explore financial data through natural language questions and visual dashboards. The system connects to Sage accounting data and uses AI to translate plain-English questions into database queries, making complex financial analysis accessible to non-technical users.

Thus far, we've completed three major development modules delivering a fully functional financial intelligence platform. The core proof-of-concept, AI question library, and global date filtering systems are all deployed and operational. Four additional enhancement modules are documented and ready for prioritization.

Current Status: 3 modules completed and deployed, 4 modules proposed and documented.

Module 0000: Core Proof of Concept

Status: ✅ Completed **Completion:** 100%

What It Does

Establishes the foundational platform connecting Sage financial data to a web-based dashboard with AI-powered natural language querying. Users can view revenue and expense trends on visual charts and ask questions about their financial data in plain English.

Key Features

- Financial dashboard showing KPIs, monthly trends, and class breakdowns
- AI query interface accepting natural language questions
- Real-time SQL generation and data visualization
- Deployed to web (accessible via URL, no installation needed)
- Connected to live AWS RDS database with actual Sage financial data

Status Details

Deployed to production on October 26, 2025. Successfully validated core technical assumptions: AI can generate accurate SQL from natural language, Sage data integrates cleanly, and the technology stack performs reliably.

Module 0001: AI Question Library & Smart Response Formatting

Status: ✅ Completed **Completion:** 100%

What It Does

Provides a curated library of pre-built example questions organized by category, making it easy for new users to discover what the system can answer. The system automatically formats responses intelligently—displaying data as charts when showing trends, tables when comparing items, or simple narratives when answering direct questions.

Key Features

- 20 example questions organized into 5 categories (Metrics, Trends, Variances, Job Performance, Regional Analysis)
- One-click question selection (no typing required)
- Automatic format detection (shows charts for trends, tables for comparisons)
- Aggregate statistics (totals, averages, min/max) for multi-row results
- SQL display modal allowing users to see the generated database queries
- Usage tracking showing which questions are most popular

Status Details

Deployed to production on October 29, 2025. All features tested and verified. System successfully formats responses based on query type, and the question library improves user discoverability significantly.

Module 0002: Global Date Range Picker & Admin Navigation

Status: ✅ Completed **Completion:** 100%

What It Does

Enables users to filter all financial data by different time periods (This Month, Last Quarter, Year to Date, etc.) using a simple dropdown menu. The system automatically adjusts all reports and AI queries to show only data within the selected date range, eliminating the need to manually specify dates in every question.

Key Features

- 10 preset date range options (This Month, Last Quarter, YTD, Inception to Date, etc.)
- Fiscal calendar awareness (respects company's fiscal year start date)
- Persistent selection (remembers choice across sessions)
- Visual date range indicator on all views
- Admin navigation button for system management
- Corrected data foundation (fixed COGS/expense account classifications)
- UTC-based date calculations preventing timezone issues

Status Details

Deployed to production on October 31, 2025. Date filtering works seamlessly across dashboard widgets and AI queries. All timezone issues resolved. Database synchronized with correctly classified financial data ensuring accurate profit calculations.

Module 0003: Admin CRUD Interface for Supporting Tables

Status: 📋 Proposed **Completion:** 0% (planning complete, awaiting development start)

What It Does

Provides a web-based admin interface where authorized users can manage supporting data tables (AI questions, job classifications, manager assignments, account categories, etc.) without requiring database access or developer intervention. Users can create, edit, search, and delete records through guided forms with validation.

Key Features

- Web-based data management for 7 supporting tables
- Search and filter capabilities for finding records
- Form validation to prevent data corruption
- Bulk operations (import/export via CSV)
- Change audit trail
- Professional table interface with sorting and pagination

Status Details

Requirements gathering complete. Executive and Technical SRS documents finalized on October 31, 2025. Ready for PRD development and task breakdown. Estimated 2-3 week development effort. High business value for operational efficiency—eliminates email chains and developer bottlenecks for routine data updates.

Module 0004: AI Context Management System

Status: 📋 Proposed **Completion:** 0% (concept documented, awaiting discovery interview)

What It Does

Allows sophisticated users to view and edit the "knowledge" that guides the AI's SQL generation—business terminology, calculation formulas, and example patterns—through an admin interface. Changes can be tested before deployment and rolled back if they reduce accuracy.

Key Features

- View all AI context in structured, readable format
- Edit business glossary, calculation examples, and query patterns
- Test changes against sample questions before saving
- Version history with rollback capability
- Audit trail of all changes
- Locked system sections (table schemas) vs editable user sections

Status Details

Concept documented in seed file on October 31, 2025. Addresses business need for domain experts to refine AI behavior without developer involvement. Provides safety through testing and versioning. Requires discovery interview and formal SRS development before implementation.

Module 0005: Hybrid AI Query System with Saved SQL

Status: 📋 Proposed **Completion:** 0% (concept documented, awaiting discovery interview)

What It Does

Combines the reliability of pre-written SQL with the flexibility of AI generation. Frequently-used questions have verified SQL stored in the database for instant, predictable results, while custom questions still leverage AI. Both types receive AI-generated summaries for consistent user experience.

Key Features

- Pre-written SQL for verified example questions
- Favorites category showcasing best questions
- Hybrid execution (saved SQL when available, AI when not)
- Date parameter substitution in saved queries
- Admin ability to write, test, and save SQL for any question
- Sub-500ms execution for verified questions (vs 2-5s for AI)

Status Details

Concept documented in seed file on October 31, 2025. Addresses user need for predictable, fast results on common questions while maintaining AI flexibility. Complements Module 0003 (admin UI) and Module 0004 (AI context management). Quick win potential—estimated 1-2 week effort.

Module 0006: SQL Editor and Requery Functionality

Status: 📋 Proposed **Completion:** 0% (concept documented, awaiting discovery interview)

What It Does

Empowers power users to view, copy, edit, and re-execute SQL queries generated by AI. When AI gets a query "almost right," users can make small tweaks and re-run immediately rather than asking the AI again, dramatically speeding up iterative analysis.

Key Features

- Copy SQL to clipboard (one-click)
- Edit SQL directly in the modal
- Requery button to execute modified SQL
- Security validation (read-only enforcement)
- Clear error messages for invalid SQL
- "Save as Example Question" for useful queries
- Visual "Modified" badge when SQL is edited

Status Details

Concept documented in seed file on October 31, 2025. Feature inspired by observed user workflow needs during POC testing. Builds on existing SQL display modal from Module 0001. Power-user feature with high productivity impact. Estimated 1-2 week effort.

Module 0010: Full MVP Platform (18-Week Project)

Status: 📋 Proposed **Completion:** 0% (comprehensive planning complete, not yet started)

What It Does

The full-scale production platform representing the complete vision: automated data pipelines from all source systems, comprehensive dashboards, advanced AI capabilities, role-based access control, and enterprise-grade infrastructure. This is the 18-week MVP that builds upon the successful POC foundation.

Key Features

- Automated ETL from Sage, time tracking, equipment, and Aspire systems
- Centralized data warehouse with 3 years of historical data
- Multiple interactive dashboards (executive, operational, project-level)
- Advanced AI with predictive analytics and anomaly detection
- Role-based access control and audit logging
- Daily automated data refresh with reconciliation
- Mobile-responsive design for field access
- Export and reporting capabilities

Status Details

Comprehensive SRS and PRD documented. Represents the long-term vision after POC validation. Planned as 18-week effort requiring full team. Prerequisites: POC completion (done), stakeholder sign-off on architecture, resource allocation. This is the "big build" that Modules 0000-0006 prepare for and inform.

Project Metrics

Status	Count	Modules
✅ Completed	3	0000, 0001, 0002
🔄 In Progress	0	-
📋 Proposed	5	0003, 0004, 0005, 0006, 0010

Total Progress: 38% of planned features complete (3 of 8 modules delivered)

Key Achievements This Period

1. **Complete Platform Operational** - Core POC, AI questions, and date filtering all deployed

2. **Data Quality Resolved** - Fixed COGS classifications and account sign conventions
3. **Timezone Issues Eliminated** - UTC-based calculations prevent date shifting bugs
4. **Smart AI Response Formatting** - Automatic chart/table/narrative selection improves UX
5. **Clear Development Roadmap** - Four enhancement modules documented and ready to prioritize

Upcoming Priorities

Immediate (Next 1-2 Weeks)

1. **Module 0003** (Admin CRUD Interface) - Highest business value for operational efficiency
2. **Module 0005** (Hybrid SQL System) - Quick win for query reliability and performance

Near-Term (3-4 Weeks)

3. **Module 0006** (SQL Editor) - High productivity impact for power users
4. **Module 0004** (AI Context Management) - Valuable but can wait for proven need

Long-Term (Post-POC Validation)

5. **Module 0010** (Full MVP Platform) - 18-week comprehensive build leveraging POC learnings

Report Generated: October 31, 2025 **Next Update:** Weekly or upon major milestone completion