

Dashboard Spec v1 — Interchangeable Buckets

Operations Flow: Jobs → Leasing → Materials → Architecture → Financing → Plant Ops → University/Video

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Owner: Russ / Ops Command

1) Purpose

Build one operational dashboard where all buckets run in sequence, share one data model, and can be switched/interchanged instantly by project, site, owner, and timeline.

2) Bucket Sequence (Primary Navigation)

1. Intro to Manufacturing Video
2. Bucket 1 — Jobs (Tex / WV / VTC / BEV)
3. Bucket 2 — Leasing (WV / VTC / Tex)
4. Bucket 3 — Materials + Cost Management (PDF-driven)
5. Bucket 4 — Architecture (R Plan + Modular)
6. Bucket 5 — Financing (NOI playbooks per asset)
7. Bucket 6 — Plant Operations
8. Bucket 7 — University + Video
9. Master Flow Timeline (cross-bucket)

3) Interchangeable Data Schema (Required)

Every bucket must use these shared fields:

- project_id
- site (Tex, WV, VTC, BEV)
- bucket_id
- phase (P1/P2/P3/P4)
- task_id
- task_name
- owner
- due_date
- status (R/Y/G)
- dependency_bucket
- dependency_task
- kpi_name
- kpi_value
- blocker_flag
- blocker_reason
- last_update

Rule: no bucket-specific custom schema without mapping to this core model.

4) Screen Layout

Screen A — Executive Command View

- Top KPI strip: NOI, schedule variance, material variance, leasing velocity
- R/Y/G board by bucket
- Today's top blockers
- Decisions required panel

Screen B — Bucket Drilldown

- Task list with owner/due/status
- Linked source docs (PDF/video)
- Milestone checkpoints
- Recovery actions

Screen C — Timeline/Gantt

- Cross-bucket timeline with dependency lines
- Site filters (Tex, WV, VTC, BEV)
- Critical path highlight

Screen D — Dependency Map

- Node graph: task blocking relationships
- Late risk propagation preview

Screen E — Daily Digest Builder

- Auto-compiles per bucket closeout
- Executive summary at 6:15 PM

5) Workflow Logic

1. Task created in any bucket
2. Must include owner + due date + acceptance criteria
3. If dependency exists, "blocked by" fields required
4. Status updated daily
5. Slips >48h auto-escalate to RED
6. Daily digest captures open RED + decisions needed

6) R/Y/G Standards

- **GREEN:** on track, no critical dependencies at risk
- **YELLOW:** at risk within 48h or missing prerequisite
- **RED:** >48h slip, unresolved critical blocker, or no owner

7) Governance Rules

- No open-end tasks
- No verbal-only approvals on critical path
- Any budget overrun >2.5% triggers same-day escalation
- Any schedule slip >2 days requires 24h recovery plan

8) Timeline Control

Daily

- 8:00 AM command sync
- 1:00 PM blocker review
- 6:00 PM bucket closeout due
- 6:15 PM executive digest

Weekly

- Friday cross-bucket milestone review
- Variance and shortfall reconciliation

Monthly

- Portfolio KPI trend and resource rebalance

9) Document Layer (Linked by Bucket)

- Jobs docs
- Leasing docs
- Materials/Cost PDFs
- Architecture plans (R Plan/Modular)
- NOI and lender takeout playbooks
- Plant ops SOPs
- University/training/video assets

Each task row should support direct click-through to linked document/video.

10) Implementation Phases

Phase 1 (Week 1–2)

- Finalize schema
- Build bucket tables and owner mapping
- Connect source PDFs/videos

Phase 2 (Week 3–4)

- Enable timeline + dependency map
- Turn on digest automation
- Pilot with one site + two buckets

Phase 3 (Week 5–6)

- Full bucket rollout
- KPI threshold automation
- Executive command adoption

11) Success Criteria

- 100% tasks have owner/due/acceptance criteria
- 100% bucket updates submitted daily
- RED blocker response <24h
- Cross-bucket delays reduced month-over-month
- Decision-to-action cycle time improved

12) Recommended Next Deliverables

1. Field mapping CSV for dashboard ingestion
2. UI wireframe PDF
3. R/Y/G threshold config table
4. Daily digest template by bucket