

Portfolio health report

All records

PROJECTS REPORTED
4

Jul 2026 · 12 reports in the filter

RED / AMBER
2 / 0

red: Customer portal replacement, Finance system upgrade

WORSENERD SINCE LAST PERIOD
1

Customer portal replacement Amber→Red

ESCALATIONS REQUESTED
2

Customer portal replacement, Finance system upgrade

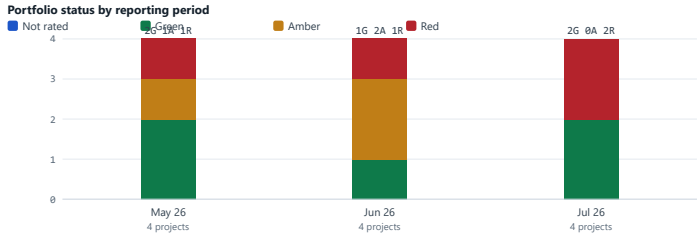
PORTFOLIO BUDGET USED
74.2%

\$2,344,000.00 of \$3,160,000.00 across 4 projects

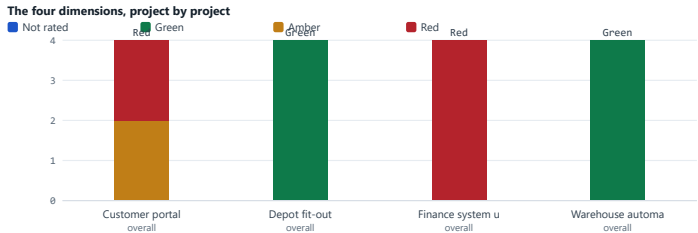
WORST SCHEDULE VARIANCE
+88 d

Finance system upgrade · forecast against baseline

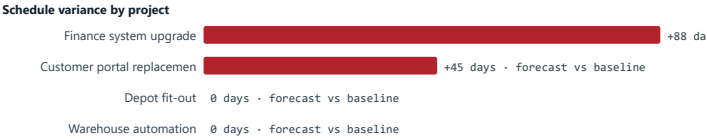
12 of 12 record(s) included. All records. Amounts in USD.



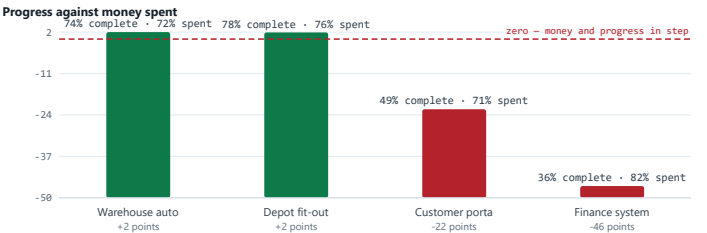
The single most useful picture in the tool: not how the portfolio looks today, but which way it is moving. A block of amber growing into red over three periods is a portfolio being managed too late. "Not rated" counts reports with no overall status recorded. The single most useful picture in the tool: not how the portfolio looks today, but which way it is moving. A block of amber growing into red over three periods is a portfolio being managed too late. "Not rated" counts reports with no overall status recorded.



Each bar is four dimensions. A project whose overall status is greener than the bar underneath it is the one worth a question: which of those ratings is not being carried through to the headline, and why? Each bar is four dimensions. A project whose overall status is greener than the bar underneath it is the one worth a question: which of those ratings is not being carried through to the headline, and why?



Positive is late. A project holding a baseline date it cannot make will show zero here until somebody moves the forecast, which is exactly why the forecast has to be moved honestly. Positive is late. A project holding a baseline date it cannot make will show zero here until somebody moves the forecast, which is exactly why the forecast has to be moved honestly.



Bars are drawn from the bottom of the axis, so read them against the dashed zero line rather than against the baseline: above the line, work is running ahead of the money; below it, money is going out faster than work is getting done. The axis is labelled with the true gap. Bars are drawn from the bottom of the axis, so read them against the dashed zero line rather than against the baseline: above the line, work is running ahead of the money; below it, money is going out faster than work is getting done. The axis is labelled with the true gap.

Portfolio — latest period

PROJECT	PHASE	OVERALL	SCHED	BUDGET	SCOPE	RESOURCE	% DONE	BUDGET USED	FORECAST VS BASELINE	VAR (D)	ESCALATE	TOP ISSUE
Customer portal replacement	Delivery	Red	Red	Amber	Amber	Red	49%	71.1%	2026-11-13 vs 2026-09-29	+45	✓	The single integration developer has been unavailable for four consecutive weeks and no cover has been approved.
Finance system upgrade	Delivery	Red	Red	Red	Red	Red	36%	82.3%	2027-01-09 vs 2026-10-13	+88	✓	Scope still not frozen after three periods; 82% of the approved budget is spent against 36% of the work.
Depot fit-out	Delivery	Green	Green	Green	Green	Green	78%	75.9%	2026-11-04 vs 2026-11-04	0		Racking install crew is single-sourced; no second supplier has been qualified.
Warehouse automation	Testing	Green	Green	Green	Green	Green	74%	71.8%	2026-12-18 vs 2026-12-18	0		Operator training has to be delivered across three shifts inside a two-week window.

Movement since last period

PROJECT	PREVIOUS	CURRENT	DIRECTION	% COMPLETE CHANGE	VARIANCE CHANGE	COMMENTARY
Customer portal replacement	2026-06-30 · Amber	2026-07-31 · Red	Worsened	+11 pts	+24 d	Now forecasting six and a half weeks past the baseline. Spend is well ahead of progress because the wider team...
Depot fit-out	2026-06-30 · Green	2026-07-31 · Green	Held	+23 pts	0 d	Racking complete and signed off. Remaining work is electrical second fix, safety marking and the goods-in offi...
Finance system upgrade	2026-06-30 · Red	2026-07-31 · Red	Held	+5 pts	+14 d	Third consecutive request for the same decision. At the current burn the approved budget is exhausted in about...
Warehouse automation	2026-06-30 · Amber	2026-07-31 · Green	Improved	+16 pts	-7 d	All acceptance tests passed. Back on the baseline date. Remaining risk is training logistics rather than techn...

Project status reports

PERIOD END	PROJECT	SPONSOR	MANAGER	PHASE	OVERALL	SCHED	BUDGET	SCOPE	RESOURCE	% DONE	SPENT	APPROVED	FORECAST	BASELINE	TOP ISSUE	ESCALATE
2026-05-31	Depot fit-out	Operations director	S. Almeida	Delivery	Green	Green	Green	Green	Green	30.0	\$180,000.00	\$640,000.00	2026-11-04	2026-11-04	Nothing outstanding — the long-lead racking order is placed and confirmed.	No
2026-06-30	Depot fit-out	Operations director	S. Almeida	Delivery	Green	Green	Green	Green	Green	55.0	\$340,000.00	\$640,000.00	2026-11-04	2026-11-04	Racking install crew is single-sourced; no second supplier has been qualified.	No
2026-07-31	Depot fit-out	Operations director	S. Almeida	Delivery	Green	Green	Green	Green	Green	78.0	\$486,000.00	\$640,000.00	2026-11-04	2026-11-04	Racking install crew is single-sourced; no	No

Period End	Project	Sponsor	Manager	Phase	Overall	Sched	Budget	Scope	Resource	% Done	Spent	Approved	Forecast	Baseline	Top Issue	Escalate
															second supplier has been qualified.	
2026-05-31	Customer portal replacement	Commercial director	J. Okafor	Delivery	Green	Green	Green	Green	Amber	22.0	\$210,000.00	\$900,000.00	2026-09-29	2026-09-29	The integration developer is shared with two other projects and has no protected time.	No
2026-06-30	Customer portal replacement	Commercial director	J. Okafor	Delivery	Amber	Amber	Green	Amber	Amber	38.0	\$430,000.00	\$900,000.00	2026-10-20	2026-09-29	The integration developer has been pulled onto incident work for three of the last four weeks.	No
2026-07-31	Customer portal replacement	Commercial director	J. Okafor	Delivery	Red	Red	Amber	Amber	Red	49.0	\$640,000.00	\$900,000.00	2026-11-13	2026-09-29	The single integration developer has been unavailable for four consecutive weeks and no cover has been approved.	Yes
2026-05-31	Warehouse automation	Supply chain director	M. Renner	Delivery	Amber	Amber	Amber	Green	Amber	40.0	\$520,000.00	\$1,100,000.00	2027-01-05	2026-12-18	Conveyor controller firmware failed two acceptance tests and the vendor engineer is off site.	No
2026-06-30	Warehouse automation	Supply chain director	M. Renner	Delivery	Amber	Amber	Green	Green	Green	58.0	\$640,000.00	\$1,100,000.00	2026-12-25	2026-12-18	Two acceptance tests still to be repeated before the pick line can run at rate.	No
2026-07-31	Warehouse automation	Supply chain director	M. Renner	Testing	Green	Green	Green	Green	Green	74.0	\$790,000.00	\$1,100,000.00	2026-12-18	2026-12-18	Operator training has to be delivered across three shifts inside a two-week window.	No
2026-05-31	Finance system upgrade	Finance director	K. Lindqvist	Delivery	Red	Red	Amber	Red	Amber	25.0	\$310,000.00	\$520,000.00	2026-12-14	2026-10-13	Scope was never agreed in writing; three departments are still adding requirements.	Yes
2026-06-30	Finance system upgrade	Finance director	K. Lindqvist	Delivery	Red	Red	Red	Red	Amber	31.0	\$372,000.00	\$520,000.00	2026-12-26	2026-10-13	Scope still not frozen; two further reporting requirements added this period.	Yes
2026-07-31	Finance system upgrade	Finance director	K. Lindqvist	Delivery	Red	Red	Red	Red	Red	36.0	\$428,000.00	\$520,000.00	2027-01-09	2026-10-13	Scope still not frozen after three periods; 82% of the approved budget is spent against 36% of the work.	Yes

Notes

Sample portfolio — replace every report with your own before relying on it or circulating it. Two decisions are being asked for this period: contract cover for the portal integration developer, and a scope freeze or re-approval on the finance system upgrade, which has now been requested three periods running.

This dashboard reports what the project manager wrote down. It cannot tell whether a status is honest, whether the percent complete is real, or whether the top issue is the one that will actually cause the miss — and it has no way of seeing a problem nobody entered. Read it with that in mind: a portfolio that is entirely green every month is a reporting culture problem, not a delivery achievement. The figures are arithmetic on the numbers you typed, not an assessment of the projects.