



ITM Platform  
PROJECTS • PROGRAMS • PORTFOLIO



# Where Strategy Drives Projects





**ITM Platform**  
PROJECTS • PROGRAMS • PORTFOLIO

**ITM Platform** is the Project Portfolio Management software that aligns your projects to the business strategy.

Team members will learn how to use the fully-featured project and **work management** tools within a day, providing portfolio managers with access to the **metrics that matter**.



# Feature Index

---

## Projects

Gantt	4
Kanban	4
Costs	5
Tasks	5
Team	6
Progress	6
Documents	7
Risks & Issues	7

## Programs & Portfolio

Portfolio	8
Programs	8

## Planning and Monitoring

Goals	9
Services	9
Strategic Planning	10
Project Planning	10
Resources	11
Earned Value	11

## Costs & Revenues

Cost and Revenues	12
Margin and Profitability	12
Revenue Recognition	13

## Customers & Suppliers

Customers Management	14
Suppliers Management	14

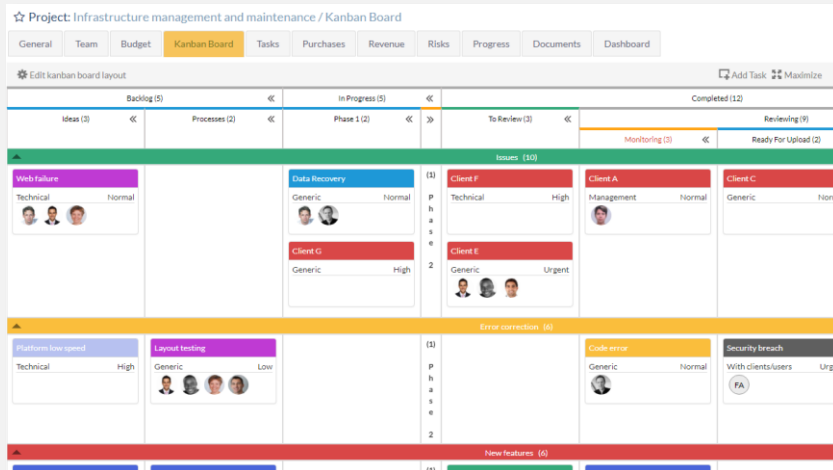
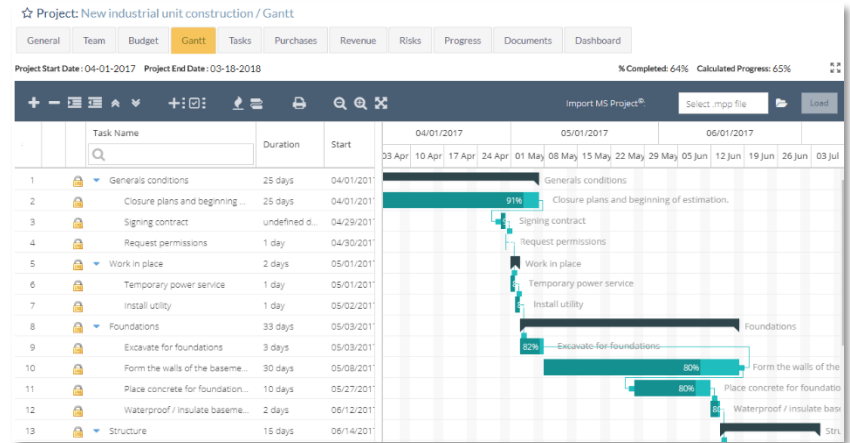
## Information & Communication

Social Network	15
Mobile App	15
Dashboards	16
Timesheet	16
Custom Fields	17
Multicurrency	17
Workflow	18
Custom Report	18

## Gantt Chart

The classic Project Management tool:  
Plan, control and measure time.

Baseline  
Critical path  
MS Project Imports  
Drag & drop  
Online planning and monitoring



## Agile Projects (Kanban)

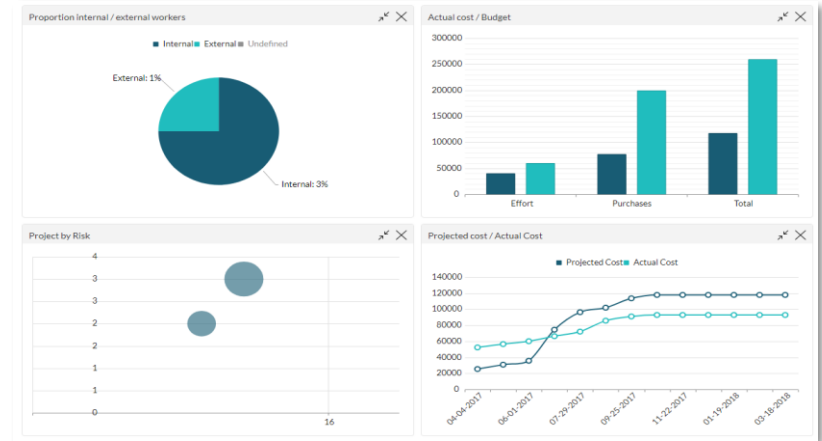
Manage teamwork with full visibility  
of all work in progress.

Synchronized Kanban board  
Custom columns  
Integrated portfolio  
Integrated social network  
Documentation, monitoring and control

## Costs and Revenue

Control project cash flow with the zoom that suits you:  
tasks, projects or programs.

Estimated and real costs stemming from hours worked  
External costs (goods and services)  
Forecast and real revenue  
Project margin



Project: New industrial unit construction/ Install utility

General | Team | Budget | Gantt | **Tasks** | Purchases | Revenue | Risks | Progress | Documents | Dashboard

General | Team | **Effort** | Purchases | Revenue | Progress | Documents

Summary of: Install utility

Task Start Date: 05-02-2017      End Date: 05-02-2017      Duration: 1 days

Total Estimated Effort: 8:00h      Actual Effort: 0:00 h 0%

Assign by Professional Category

Professional Category	Assigned Effort	Unassigned Effort	Total Estimated Effort	Actual Effort By Time Entry	Actual Accepted Effort	Delete
Administrative staff (External)	4:00	0:00	4:00	15:15	0:00	
Engineer (Internal)	4:00	0:00	4:00	15:15	0:00	
Controller (Internal)	0:00	0:00	0:00	0:00	0:00	
General (no category)	0:00	0:00	0:00	0:00	0:00	
<b>Total</b>	<b>8:00h</b>	<b>0:00h</b>	<b>8:00h</b>	<b>6:30h</b>	<b>0:00h</b>	

Assign by Team Member

Name	Professional Category	Estimated Effort	Actual Effort By Time Entry	Actual Accepted Effort

## Task Management

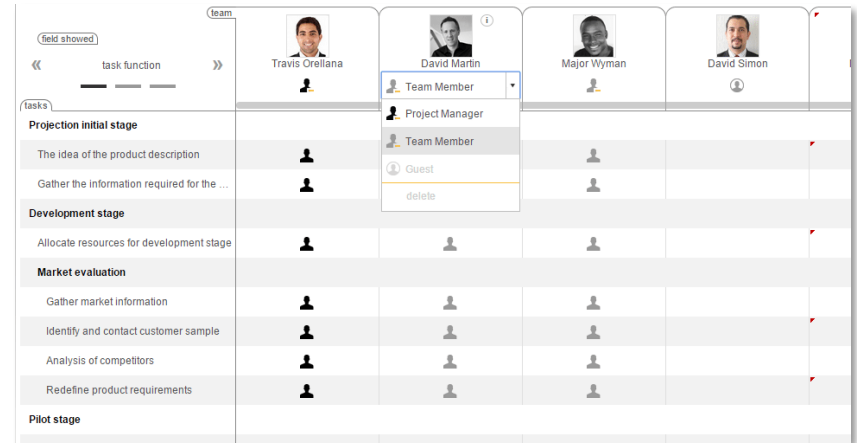
Assign work to your team and monitor progress.

Assign the project team and task manager  
Effort estimation (hours)  
Procurement and revenue associated with the tasks  
Task documentation  
Status, monitoring, priority

## Team

Assign project managers, team members and task managers.

Location of professional profiles in the resource bank  
Assignment of roles and tasks in the project  
Estimation of hours per team member and task  
Project Visuals and timesheet acceptance  
WBS combined with task members



Task	Travis Crellana	David Martin	Major Wyman	David Simon
<b>Projection initial stage</b>				
The idea of the product description				
Gather the information required for the ...				
<b>Development stage</b>				
Allocate resources for development stage				
<b>Market evaluation</b>				
Gather market information				
Identify and contact customer sample				
Analysis of competitors				
Redefine product requirements				
<b>Pilot stage</b>				

Project: New industrial unit construction / Progress

General Team Budget Gantt Tasks Purchases Revenue Risks Progress Documents Dashboard

### Progress Report:

Last progress report: Automatic follow-up (03-03-2018)

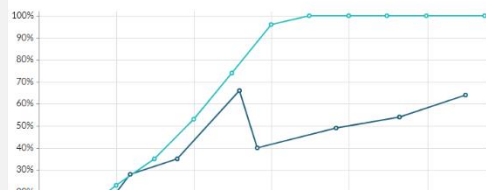
Add Progress Report

view previous progress reports

Assessment: Good



% Expected vs. % Completed



Description of current status

Project monitoring

Use monitoring processes to report on project progress. There are three areas of information:  
Evaluation as subjective information on the actual progress on this project, selecting customizable values from the dropdown list.  
Description of monitoring, which can always be accompanied by a document or the sharing of an update within the collaborative environment.  
Degree of fulfillment of the project as a percentage value.  
These monitoring processes will be taken into consideration in the Value Gained calculations

## Progress

Control project execution with progress monitoring:  
ITM Platform predicts results.

Pre-project status  
Project and task monitoring  
Distribution of monitoring responsibilities  
Earned value, future scenarios, alerts and deviations

## Documents Management

All documentation of your projects  
in a shared repository.

Unlimited document storage  
Compatible with external links and storage systems  
Links to projects, services, tasks, risks, procurement  
Internal chat about documents

★ Project: New industrial unit construction / Documents

General Team Budget Gantt Tasks Purchases Revenue Risks Progress Documents Dashboard

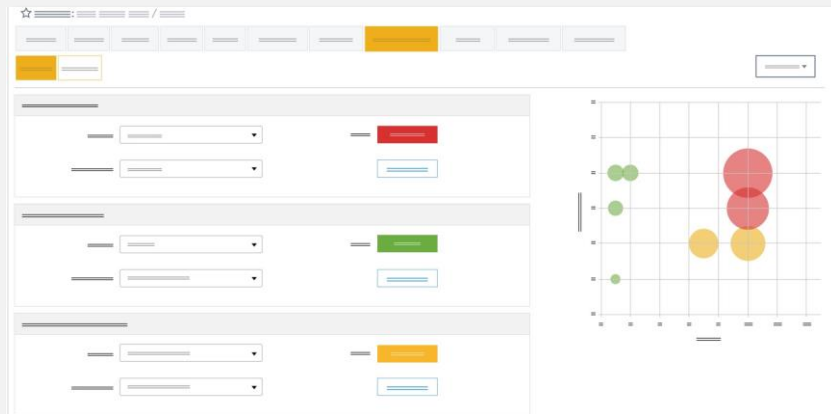
Filter

Document Name:  Start date:  End date:   
 Description:  Uploaded By:  Area/Section:   
 Include:

Apply Reset

Document Name	File Description	Area/Section	Upload Date	Parent Activity	Uploaded By	Visible by gu...		
Description video 1	Three-minute descriptive...	Project/New industrial u...	06-26-2017		Full Access	✓	📄	✗
Description document	Three-minute descriptive...	Project/New industrial u...	06-26-2017		Full Access	✓	📄	✗
Description spreadsheet	Three-minute descriptive...	Project/New industrial u...	06-26-2017		Full Access	✓	📄	✗
Description design	Three-minute descriptive...	Project/New industrial u...	06-26-2017		Full Access	✓	📄	✗
Description video	Three-minute descriptive...	Task: Request permissions	06-26-2017	Generals condit...		✓	📄	✗
Description video	Three-minute descriptive...	Task: Work in place	06-26-2017			✓	📄	✗
Description video	Three-minute descriptive...	Task: Temporary power s...	06-26-2017	Work in place		✓	📄	✗
Description video	Three-minute descriptive...	Task: Install utility	06-26-2017	Work in place		✓	📄	✗

Add New Document Export to Excel



## Risk & Issue Management

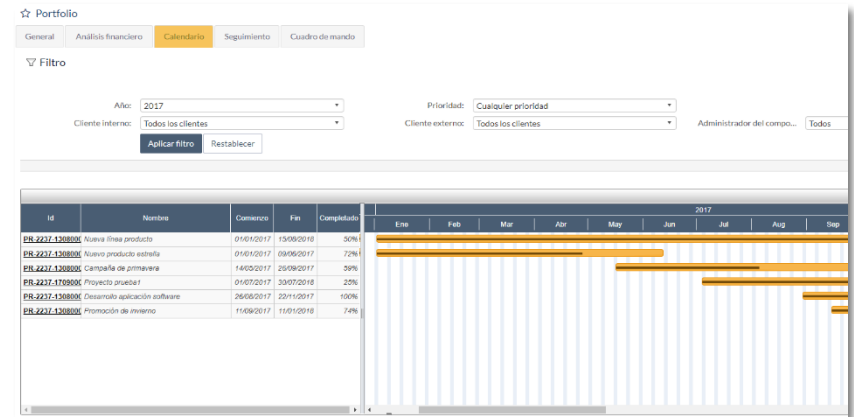
Register and manage risks. Control all issues.

Risk classification  
Problems, bugs, change request  
Customizable exposure level calculation  
Assignment of managers  
Mitigation and contingency plans  
Impact on scope, schedule and budget

## Portfolio Management

How are your projects going? Here's a global overview.

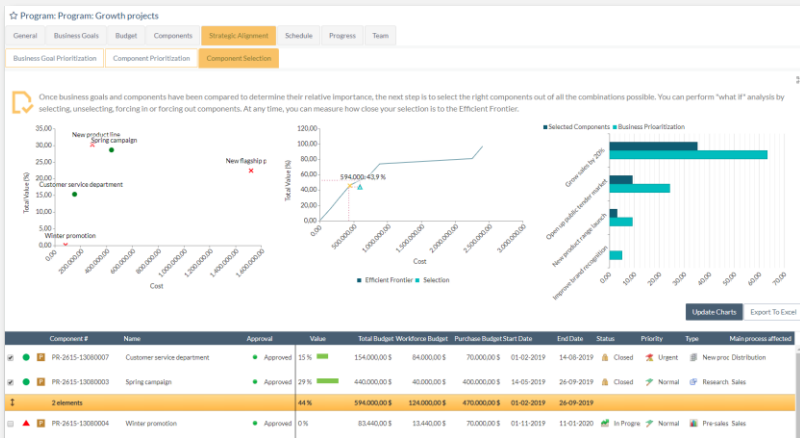
- Combined view of projects, programs and services
- Financial analysis of costs and revenue
- Individualized milestone monitoring
- Project schedule and progress status
- Portfolio dashboard
- Create dependency between projects, services and programs
- Critical road



## Program Management

Do you want to have a greater impact?  
Gather your projects in programs with common objectives.

- Component selection (projects and services)
- Program budget, estimated and real analysis of each component
- Schedule, follow-up and management team
- Alignment of objectives and projects
- Relative value of projects





## Organization by Objectives

Your projects and your business must go hand in hand.

Objective and criteria prioritization

Project evaluation

External scenarios versus project sets

Approval and monitoring of selected projects

☆ Program: Program: Growth projects

General   Business Goals   Budget   Components   **Strategic Alignment**   Schedule   Progress   Team

Business Goal Prioritization   Component Prioritization   Component Selection

Business Goals Prioritization for "Optimist – 110% sales" Scenario

⦿ Please compare each business goal to one another two at a time. Opposite judgments are automatically inferred. If Consistency Ratio is higher than 0.1 then evaluations are not supposed to be consistent.

Consistency Ratio: 0.5859	Open up public tender market	Grow sales by 20%	New product range launch	Improve brand recognition
Open up public tender market	↔ 1	↑ 0	↔ 3	↑ 5
Grow sales by 20%	↓ 1/0	↔ 1	↑ 0	↔ 3
New product range launch	↔ 1/3	↓ 1/0	↔ 1	↓ 1/0
Improve brand recognition	↓ 1/5	↔ 1/3	↑ 0	↔ 1

"Grow sales by 20%" is as important as "Improve brand recognition"

☆ Service List

Filter

Name  Approval  Status

Manager  Team  Guest

Apply   Reset

view more options

Add New Service   Export

Name	Status	External Client	Priority	Type	Start...	End D...	Service code	Service #	Approval
Customer service	In Progress	General public	Normal	Support	11-28-2...	03-13-2...		SR-2200-130...	Approve
Billing	In Progress	Government	Normal	Others	07-31-2...	08-23-2...		SR-2200-130...	Approve
Social media communication	In Progress	Government	High	Training	01-01-2...	02-28-2...		SR-2200-130...	Approve
Productivity control	In Progress	Buyers Corp.	Normal	Infrastructure...	08-16-2...	11-02-2...		SR-2200-130...	Approve
Market observatory	On Hold	Buyers Corp.	Normal	Training				SR-2200-130...	Pending

## Service Management

Projects are the heart of your company.  
Manage the daily operations that support them.

Project teams, documentation, monitoring

Timesheets

Integrated resource management

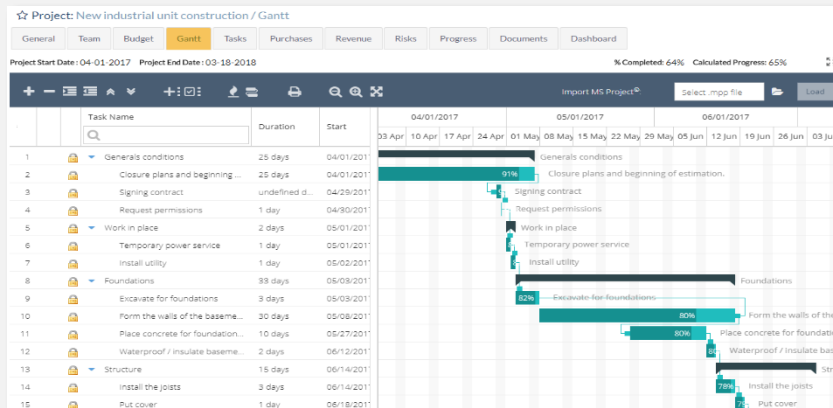
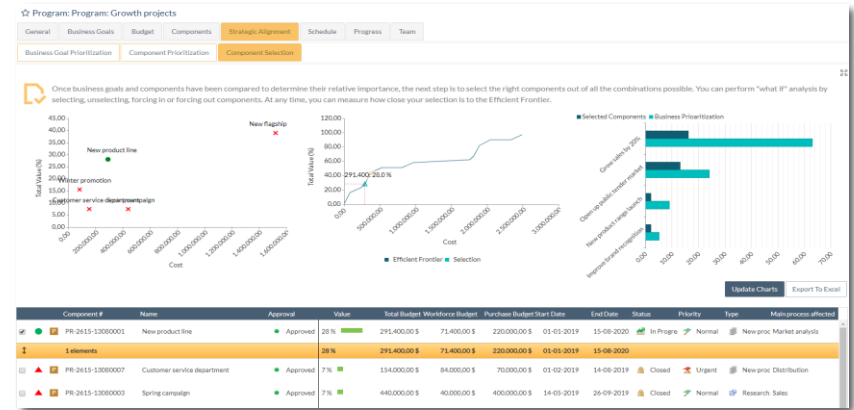
Social communication between members of the service

Activity control

## Strategic Planning

A bird's-eye view: plan your project activity and measure your resources in advance.

Pre-project and Idea Management  
Resource categorization  
"What if?" scenarios for planning  
Alignment with strategic objectives  
General and detailed budget



## Project Planning

All planning tools to define projects to the last detail.

Pre-implementation project status information

Project templates for new projects

Advanced Gantt chart planner

Allocation of resources and professional profiles

Continuous planning based on predicted scenarios

## Resource Planning

A unified view to balance demand and capacity.

Resource and overstaffing dashboard

Assign of individuals or professional profiles to tasks

Load and productivity analysis

Employee distinctions and external resources

Resource analysis based on effort

☆ Resources

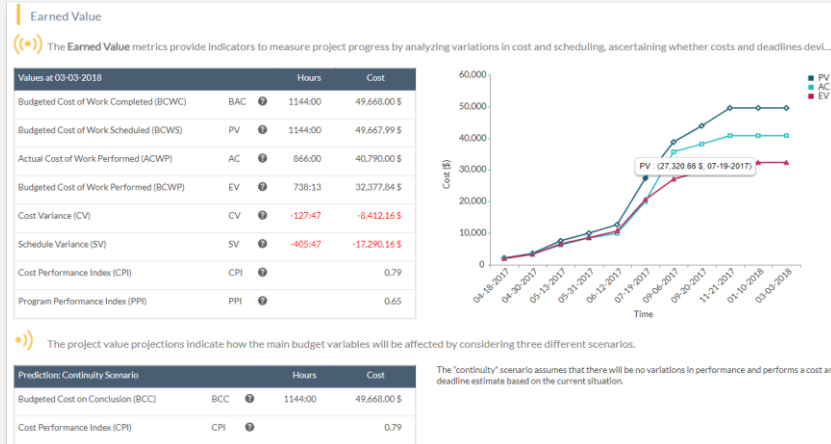
Planning   Analysis

Interval: Day   Number: 7   Start: 06-29-2017   Apply   Underalloca... 0   It...

Projects & Services	06-29-2017			06-30-2017			07-01-2017			07-02-2017		
	Demand	Allocated	Gap	Demand	Allocated	Gap	Demand	Allocated	Gap	Demand	Allocated	Gap
<b>100%</b> TOTAL DEMAND: 264:56H   TOTAL ALLOCATED: 264:56H   TOTAL GAP: 0:00H	52:32	52:32	0:00	15:02	15:02	0:00	0:00	0:00	0:00	0:00	0:00	0:00
▶ New product line	52:32	52:32	0:00	15:02	15:02	0:00	0:00	0:00	0:00	0:00	0:00	0:00
▶ Spring campaign	4:24	4:24	0:00	4:24	4:24	0:00	0:00	0:00	0:00	0:00	0:00	0:00
▶ New industrial unit construction	0:00	0:00	0:00	0:00	0:00	0:00	0:00	0:00	0:00	0:00	0:00	0:00
▶ Customer service department	3:16	3:16	0:00	3:16	3:16	0:00	0:00	0:00	0:00	0:00	0:00	0:00

Professional categories/Users	06-29-2017			06-30-2017			07-01-2017			07-02-2017		
	Capacity	Allocated	Availability	Capacity	Allocated	Availability	Capacity	Allocated	Availability	Capacity	Allocated	Availability
▼ Engineer (Internal)	32:00	46:29	14:29	32:00	8:59	23:01	0:00	0:00	0:00	0:00	0:00	0:00
David Martin Production Manager	8:00	40:11	32:11	8:00	2:41	5:19	0:00	0:00	0:00	0:00	0:00	0:00
▶ New product line												
▶ Analysis of pilot stage				40:11		2:41				0:00		0:00
				40:00		2:30				0:00		0:00



## Earned Value

Predict projects outcomes from trends.

Performance indicators

Graphs integrated into progress reports

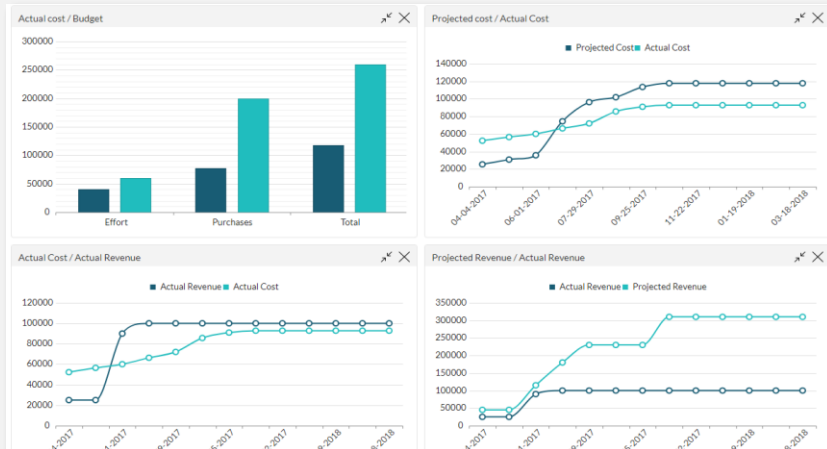
Project value projection: absolute correction, continuity and on budget from now

## Cost and Revenue Management

Total financial control of your projects:  
how much you earn and how you earn it.

Project, service and program budget  
Control of hours worked  
Global budget overview  
Revenue planning

General Team Budget Gantt Tasks Purchases Revenue Risks Progress Documents Dashboard						
Edit Top-Down Budget						
	Top Down Budget		Bottom-up (Estimated)		Actual Value	
	Hours	Amount	Hours	Amount	Hours	Amount
Internal Team:	700:00 h	29,400.00 \$ (USD)	462:00 h	27,844.00 \$ (USD)	452:15 h	27,844.00 \$ (USD)
External Team:	800:00 h	30,400.00 \$ (USD)	682:00 h	21,824.00 \$ (USD)	413:45 h	21,824.00 \$ (USD)
Undefined Team:	00:00 h	0.00 \$ (USD)	00:00 h	0.00 \$ (USD)	0:00 h	0.00 \$ (USD)
Total Workforce:	1500:00 h	59,800.00 \$ (USD)	1144:00 h	49,668.00 \$ (USD)	865:00 h	49,668.00 \$ (USD)
Purchases Budget:		200,000.00 \$ (USD)		197,500.00 \$ (USD)		197,500.00 \$ (USD)
<b>▲ Total Cost:</b>		<b>259,800.00 \$ (USD)</b>		<b>247,168.00 \$ (USD)</b>		<b>247,168.00 \$ (USD)</b>
Total Revenue:		320,000.00 \$ (USD)		310,000.00 \$ (USD)		310,000.00 \$ (USD)
Margin:		60,200.00 \$ (USD)		62,832.00 \$ (USD)		62,832.00 \$ (USD)



## Margin and Profitability

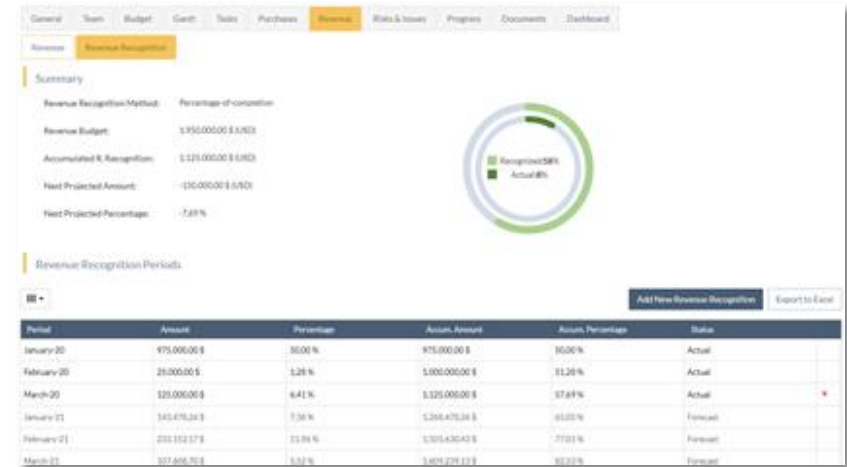
As easy as a sum:  
we show you the profitability of projects and clients.

Graphs of projected costs and revenue with analysis  
Project and service margin  
Aggregated client profitability  
Financial analysis of the portfolio

## Revenue Recognition

Full control over accrued and deferred revenue:  
Actual and forecast. These are the main methods

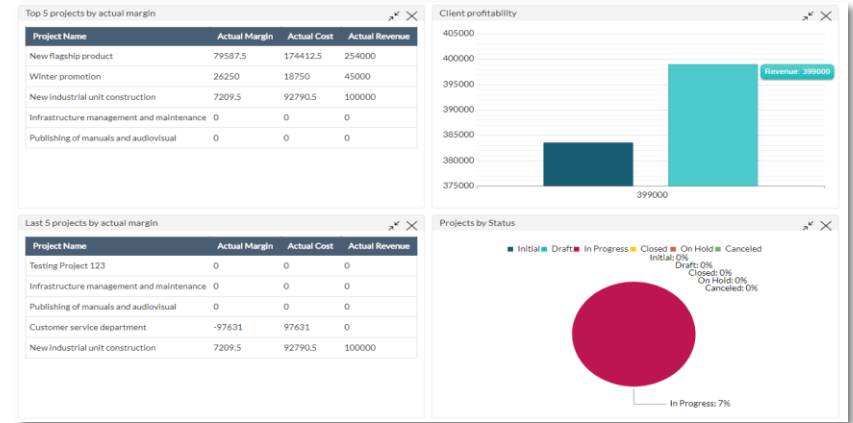
Percentage-of-completion  
Linear Distribution by Milestones  
Fixed Price per Period  
Bill Rate per Estimated Hours  
Direct Revenue Recognition



## Customers Management

Confidence built with reliable information.

Customer data administration: file, contact details  
Integration of users from the customer into projects  
Document sharing and corporate social collaboration  
Analysis of costs, revenue and profitability per customer  
Dashboard per customer



### ☆ Categories and Rates

Category Global Standard Cost Categories Standard Cost **Provider fees**

Export

	Account Manager	Administrative staff	Controller	Default	Engineer	Technical support
Manpower Inc.	--	32.00 \$	--	--	60.00 \$	34.00 \$
Quality Materials, Spa.	--	--	--	--	--	--
Blue Engineering	--	--	60.00 \$	--	80.00 \$	28.00 \$

## Suppliers Management

There are no projects without suppliers.  
Manage rates, times and bills with ITM Platform.

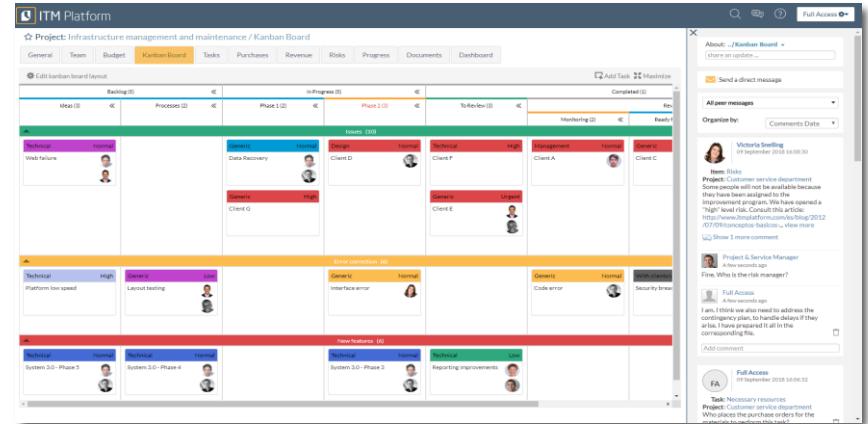
Suppliers of labor and for the general procurement of goods and services  
Administration of supplier files and contact details  
Management and comparison of rates  
Graphic analysis and comparison of supplier costs

## Integrated Social Network

Say goodbye to email:  
all communication lives in our social network.

Context-sensitive communication  
permissions and security system that forms part of  
the projects

Send e-mails to stakeholders  
Integrated into the alerts system



## Dashboards

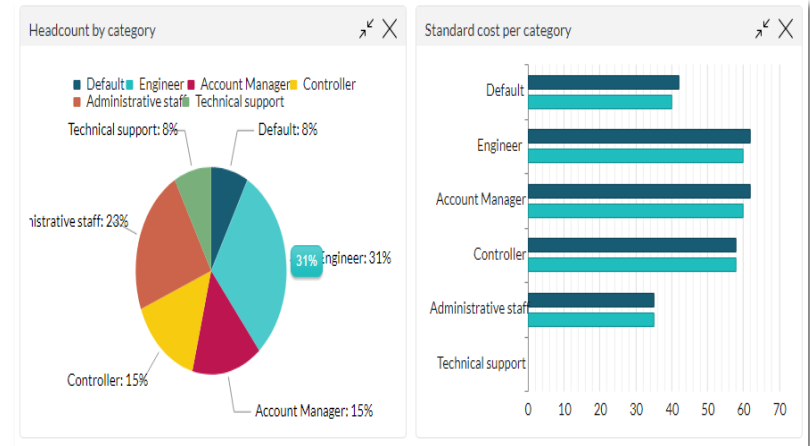
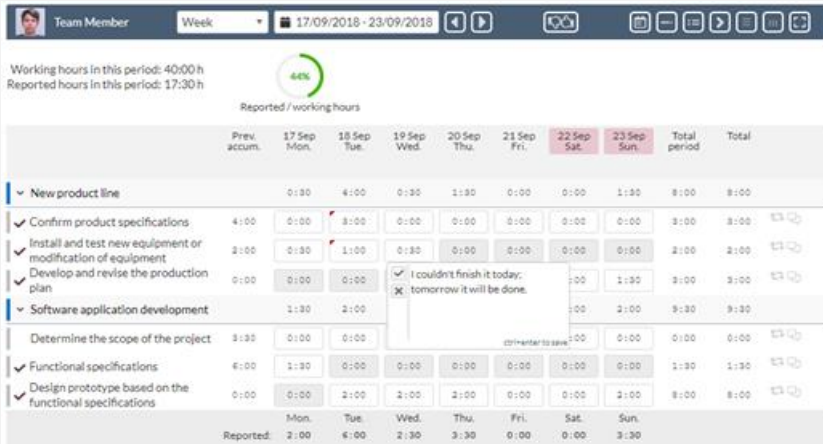
Visualize all project information.

Pre-designed graphs and indicators using the best practices in project management

In real-time

Project modules, portfolio, customers, business targets

Exportable information

Team Member | Week | 17/09/2018 - 23/09/2018

Working hours in this period: 40:00 h  
Reported hours in this period: 17:30 h  
44%

	Prev. accum.	17 Sep Mon.	18 Sep Tue.	19 Sep Wed.	20 Sep Thu.	21 Sep Fri.	22 Sep Sat.	23 Sep Sun.	Total period	Total
New product line		0:30	4:00	0:30	1:30	0:00	0:00	1:30	8:00	9:00
Confirm product specifications	4:00	0:00	3:00	0:00	0:00	0:00	0:00	0:00	3:00	8:00
Install and test new equipment or modification of equipment	2:00	0:30	1:00	0:30	0:00	0:00	0:00	0:00	2:00	2:00
Develop and revise the production plan	0:00	0:00	0:00	0:00	0:00	0:00	0:00	1:30	0:00	3:00
Software application development	1:30	2:00						0:00	2:00	9:30
Determine the scope of the project	3:30	0:00	0:00					0:00	0:00	0:00
Functional specifications	6:00	1:30	2:00	0:00	0:00	0:00	0:00	0:00	1:30	1:30
Design prototype based on the functional specifications	0:00	0:00	2:00	2:00	2:00	0:00	0:00	2:00	8:00	8:00
Reported:	2:00	6:00	2:30	3:30	0:00	0:00	0:00	3:30		

## Timesheet

Your day-to-day intuitive and easy working table.

Ability to make comments for each day.

Highlighted and concealable non-working days.

Visual information on weekly and daily progress.

Customizable periods of up to 30 days.

Report in full periods for the same value.

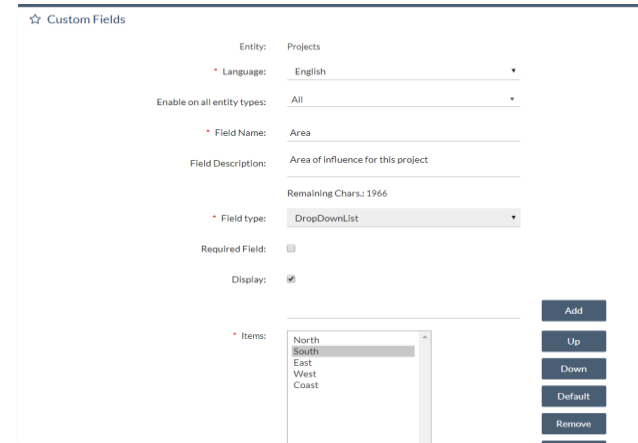
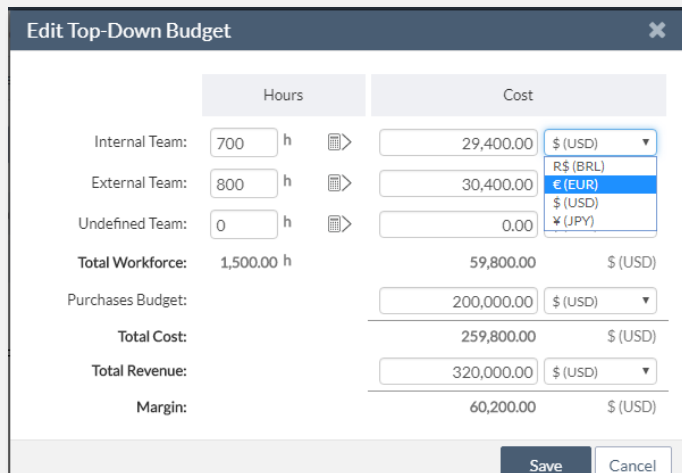
Progress report for task managers.



## Custom Fields

Add all the fields you need in any section of ITM Platform.

All sorts of fields  
Multi-language  
Option to create dynamic information lists  
Adjustable

	Hours	Cost	
Internal Team:	700 h	29,400.00	\$ (USD)
External Team:	800 h	30,400.00	R\$ (BRL)
Undefined Team:	0 h	0.00	\$ (USD)
<b>Total Workforce:</b>	<b>1,500.00 h</b>	<b>59,800.00</b>	<b>\$ (USD)</b>
Purchases Budget:		200,000.00	\$ (USD)
<b>Total Cost:</b>		<b>259,800.00</b>	<b>\$ (USD)</b>
<b>Total Revenue:</b>		<b>320,000.00</b>	<b>\$ (USD)</b>
<b>Margin:</b>		<b>60,200.00</b>	<b>\$ (USD)</b>

## Multi-language / Multi-currency

If you have projects in different countries, input local currencies linked to a single base currency.

Customizable parameters and models for each language  
Language per user within the same organization  
Multiple currencies for all economic fields  
Consolidation using a single base currency

## Workflow

Design workflows of your project status to automatize control processes that suit your organization.

- Set the allowed destination statuses
- Create rules to require authorization on status changes
- Include advances filters for authorizations
- Assign one or more approvers
- Requesters and approvers receive notifications



### Report Designer: Biannual report

Approval  Is equal to  Approved X Pending X Rejected X

AND

End Date  Between  28/09/2014  28/09/2016

REPORT COLUMNS	Type	Name	Manager(s)	Business Goal
Project teams	Type: Research, study, viability	Spring campaign	Major Wyman	Grow sales by 20%
Project budgets	Type: Product or process adaptation	Software application development	Julio Cline	Increase operational by 15%
Project purchase budgets		Market research for Phase II	Project & Service Manager	Improve brand recog

## Custom Reports

Design reports tailored to your needs and use them whenever you need them.

- Visual design “drag & drop”
- New system filters for the execution and design
- Public / Private mode
- Export to Excel

# Why ITM Platform

---



## Every kind of organization

ITM Platform adapts to organizations of any kind of size and complexity, including large departments in corporate environments.



## Software as a service

A cloud-based solution offered as a Software as a Service (SaaS). In a couple of minutes you will be managing your organization with a modern, flexible and web-based solution that doesn't need any kind of installation on your computer and can be used from anywhere in the world with any internet-connected device.



## Security and Confidentiality

Programs & Portfolio have passed the strictest security tests and, thus, guarantees information confidentiality. You can download the data from the platform and make your own backup copy at any time.



## Affordable and no commitment

It is a cheap tool with no commitment, long-term contracts or exclusive terms.



## Scalable

It is extremely scalable: our platform is used by small work groups and by big multinational companies. Furthermore, you can increase the number of users at any time.

## Some of our clients

---

Oil & Gas



Fintech



Logistics



Engineering



EHC GLOBAL

## Some of our clients

---

Financial Services



Health



Food Industry



Publishing



Fashion



Education



Quality



Manufacturing



## Our customers' voices

---



*“With ITM Platform we can efficiently manage the entire life cycle of a project in real time and from anywhere in the world. It is the vehicle to meet our clients expectations, executing projects according to the objectives set on time, cost and quality.”*

**Alberto Miguel Benito**  
Head of Project Management  
On The Spot Services - Grupo Telefónica

## Our clients' voices

---



*"In comparison to other products, ITM Platform enhances your ability to manage projects by virtually bringing every aspect of the project to your fingertips. It can become an integrator that connects the organization (management and people on the field), its clients and the projects they run"*

**Anael Ndosa**  
Chairman, PMI

*"ITM Platform is one of the most complete applications of all the PM software I have tried. They have included all you need to manage your company, projects, tasks and team"*

**Ainhua Tolentino**  
CEO, Onyriq





[www.itmplatform.com](http://www.itmplatform.com)