ITM Platform
PROJECTS ▪ PROGRAMS ▪ PORTFOLIO

PPM SOFTWARE COMPARISON

ITM Platform vs Planview Portfolios

Planview Portfolios is Planview's enterprise portfolio product, one of a family of products sold by quote. ITM Platform is one product with a published price that a PMO can have in use within weeks.

12 criteria

Scored from 0 to 5, with the evidence behind each score.

76 capabilities

Compared one by one, each with its product and source.

Both sides

Where each product is the better choice, and the limits of ours.

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www.itmplatform.com/en/ppm-software-comparison/itm-platform-vs-planview-portfolios/

THE SHORT ANSWER

Which one fits your organization

Planview Portfolios is the stronger choice for large enterprises that need strategic portfolio management in depth and have a team to run it. It is often combined with other Planview products for enterprise architecture, value stream analytics or more than sixty packaged connectors. ITM Platform fits PMOs that want portfolio, projects, resources and finance in one product at a public price. For 25 managers and 100 team members, ITM Platform costs US$11,700 a year at list price, and Planview lists Portfolios Flex on AWS Marketplace at US$203,525 a year [1].

ITM Platform

Choose ITM Platform if

- ✓ You want one product for the portfolio, planned and agile projects, ongoing services, resources and project finance.
- ✓ You need a price before the first sales call. Managers pay 26 to 39 a month, and team members need no paid license. [2]
- ✓ You want to be in use within weeks: a self-service trial, then a fixed-price configuration of about two weeks. [3]
- ✓ You want AI included in every account, and an MCP server so your own agents can read and update the portfolio. [4]
- ✓ You work in English, Spanish or Portuguese and want support from the vendor's own team.

Planview Portfolios

Choose Planview Portfolios if

- ✓ You are a large enterprise that needs strategic portfolio management in depth: investment scoring, scenario optimization and OKRs across many portfolios. [5]
- ✓ You plan a large resource pool by skills, with formal requests, approvals and timesheet approval. [5, 6, 7]
- ✓ You also need enterprise architecture, value stream analytics, idea management or enterprise Kanban from the same vendor. [8]
- ✓ Your architecture depends on packaged connectors. Planview Hub offers more than sixty. [9]
- ✓ Procurement requires vendor-held ISO 27001 and SOC 2 reports, a published availability target or hosting in a specific region. [10, 11, 12]
- ✓ Your policy asks for a vendor named a Leader by Gartner or Forrester, with a global partner network. [13, 14, 15]

THE PRODUCTS

What "Planview Portfolios" means in this comparison

Planview sells seventeen named products and presents them as five solutions on one platform [8]. ITM Platform is a single product. A comparison between the two starts with a question for Planview: which products are in the proposal.

ITM Platform is one product

Every module below is in the same license, on one data model, with one set of users and permissions.

- Portfolio and programs
- Strategic alignment
- Gantt projects
- Kanban and sprints
- Services
- Resources and timesheets
- Budgets, purchases and revenue
- Risks and issues
- Reports and dashboards
- PMPilot AI and MCP
- API and extensions

Planview is a family of products

These are the Planview products most relevant to a PMO. Each has its own documentation and status components, and several have their own price[8][12].

Planview Portfolios
Enterprise strategic and project portfolio management. Formerly Enterprise One

Planview AdaptiveWork
Configurable PPM and professional services automation. Formerly Clarizen

Planview PPM Pro
PPM for mid-size and divisional PMOs. Formerly Innotas

Planview ProjectAdvantage
Project and portfolio management. Formerly Sciforma

Planview AgilePlace
Enterprise Kanban. Formerly LeanKit

Planview ProjectPlace
Team collaboration and lightweight projects

Planview Roadmaps
Strategy and delivery roadmaps

Planview Hub
Integration with more than sixty tools. Formerly Tasktop Hub

Planview Viz
Value stream analytics. Formerly Tasktop Viz

Planview Anvi
AI assistant, agents and MCP server. Formerly Planview Copilot

Planview IdeaPlace
Idea and innovation management. Formerly Spigit

Planview Enterprise Architecture
Enterprise architecture

This comparison scores Planview Portfolios, the product Planview positions for enterprise portfolio management[16] and the one priced in the pricing section. Where another Planview product covers a gap, the facts name it, with its price when Planview publishes one. The capability table marks that product as Add-on, and it does not raise the score. A mid-

size buyer may be offered PPM Pro, AdaptiveWork or ProjectAdvantage instead, and their capabilities differ. Ask which product each demonstrated capability comes from.

AT A GLANCE

ITM Platform and Planview Portfolios side by side

The facts a budget holder and a PMO lead usually ask for first. Planview facts name the product they refer to.

	ITM Platform	Planview Portfolios
What it is	One product for projects, agile work, services, programs and the portfolio [17]	A family of 17 products presented as five solutions. Portfolios, AdaptiveWork, PPM Pro and ProjectAdvantage cover PPM [8]
Typical buyer	PMOs in mid-size and large organizations, project-based companies and public bodies [18]	Large enterprises. Planview reports more than 3,000 customers, including 45% of the Fortune 100 [19, 8]
List price	Public: US$39, 34 or 26 per manager per month, billed annually [2]	No price list. AWS Marketplace lists Portfolios Flex at US$203,525 a year for 25 managers and 100 team members [20, 1]
Who needs a paid license	People who manage projects or portfolios. Team Members and guests are free [2]	Set per product in each order form. User IDs cannot be shared [21]
Smallest contract	5 manager licenses: US$2,340 per year [2]	Not published [21]
Free trial	14 days, self-service, no credit card [2]	30 days for AgilePlace and ProjectPlace. Demos for Portfolios, AdaptiveWork and PPM Pro [22]
Products and add-ons	One edition. AI, API, MCP server, extensions and single sign-on included [2]	Products are licensed separately. Anvi AI is a consumption-based subscription and Hub is a product of its own [23, 24]
Deployment	SaaS on Azure (West Europe). Options: single-tenant private cloud in any Azure region, or on-premise [25]	SaaS, in US, EU, UK and Asia-Pacific regions depending on the product. On-premises under a separate agreement [12, 26]
AI	PMPilot assistant, questions over live data, AI plans and weekly AI reports, included for every account [27]	Planview Anvi: assistant, insights, agents and scheduled workflows. Beyond documentation chat it needs an Anvi subscription [28, 23]
MCP server for AI agents	Yes. Hosted server with 47 tools that read and write, OAuth 2.1 and each user's permissions, included [4]	Yes, since September 2026. Anvi MCP server, with an Anvi license [29, 30]
Integrations	REST API with 358 operations, GraphQL DataMart, MCP server and an extension engine, all included. Packaged: Jira, Microsoft Dynamics, HubSpot, Salesforce, Zendesk, Help Scout, Microsoft Project, Teams, Power BI [31, 32]	Planview Hub with more than 60 connectors, sold as a product. APIs per product and an AdaptiveWork marketplace [9, 24, 33]
Automation and extensions	Included. Scripts that run on record events, schedules or webhooks, call other systems and can stop a save [2, 34]	Lifecycles and scripted dialogs. Webhooks not documented for Portfolios; packaged connectors through Planview Hub, a separate product [5, 9, 24]
Standard implementation	Fixed-price configuration service of about two weeks [3]	FastTrack method with fixed-price packages. No duration published [35, 36]

	ITM Platform	Planview Portfolios
Support	Included in the license: online, 12 hours a day, 5 days a week [2]	Standard: portal and email, 24 hours a day, 5 days a week. Configuration and how-to questions can go to billable services [37, 38]
Interface languages	English, Spanish and Portuguese [17]	Varies by product. PPM Pro: English, German, French, Spanish, Portuguese and Swedish [39]
Security certifications	None held by ITM Platform itself. Hosted on Microsoft Azure, whose ISO 27001 and ISO 27701 certificates cover the infrastructure [40, 41]	ISO 27001, ISO 27701 and annual SOC 2 audits [10]
Mobile	Responsive web. No native app	Native apps for AdaptiveWork and ProjectPlace. Mobile browser for Portfolios timesheets and PPM Pro [42, 43, 44]
Company	Selling the product since 2011. Legal entities in Madrid and London [18]	Founded in 1989. Austin, Texas. More than 1,500 employees [19]
User reviews	Capterra: 4.5 of 5 from 105 reviews. G2: 4.8 of 5 from 13 reviews, dated 2017 to 2020 [45, 46]	G2: Portfolios 3.8 of 5 from 90 reviews, AdaptiveWork 4.1 from 542. Gartner Peer Insights: Portfolios 4.3 from 354 ratings [47, 48, 49]
Reviewers on ease of use, value and support	Ease of use 4.4, value for money 4.5 and customer support 4.6 of 5, from 105 reviews on Software Advice [50]	Ease of use 3.8, value for money 3.9 and customer service 4.2 of 5, from 19 reviews on Capterra [51]

Numbers in brackets link to the sources at the end of the page.

MAIN DIFFERENCES

What changes for the PMO

These are the differences a mid-size PMO usually notices first when it compares ITM Platform with Planview Portfolios.

One product, or a family of products

Planview covers portfolio management with several products: Portfolios for enterprise portfolios, AdaptiveWork and PPM Pro for PPM, AgilePlace for Kanban, ProjectPlace for team collaboration, Hub for integrations and Anvi for AI [8]. Each has its own documentation, and several have their own price.

ITM Platform puts the portfolio, Gantt and Kanban projects, services, resources and finance in one license and one data model. Project managers, resource managers and finance users work on the same records.

ITM Platform	Planview Portfolios
One product, one paid license type and one set of permissions.	Seventeen named products presented as five solutions [8].

A price you can check before the first call

ITM Platform publishes its price list. For 25 managers and 100 team members the licenses cost US$11,700 a year, because team members need no paid license [2].

Planview has no price list on its website [20]. It does list Portfolios Flex on AWS Marketplace: US$203,525 a year for 25 managers and 100 team members, on a 12-month contract [1]. A direct quote may differ, so ask for one.

ITM Platform	Planview Portfolios
US$11,700 a year at list price for this team.	US$203,525 a year in Planview's AWS Marketplace listing [1].

Project finance inside the PPM product

ITM Platform shows each project's top-down budget, bottom-up estimate, actual cost and revenue on one screen, with dated rates, purchases, five revenue recognition methods and a period close [52] [53]. Project-based companies use it to follow margin per project and per client.

Planview Portfolios is built for financial planning across portfolios [16]. Planview positions professional services automation, with billing and revenue, on AdaptiveWork and ChangePoint [54] [55].

ITM Platform	Planview Portfolios
Budget, purchases, revenue recognition and period close in the same product.	Portfolio financial planning in Portfolios. Services billing in AdaptiveWork or ChangePoint [55].

AI that is included, or licensed by consumption

Both products have an assistant that answers questions about portfolio data, and both offer an MCP server so that external AI agents can work with that data [4] [30].

In ITM Platform the assistant, AI plans, weekly AI reports and the MCP server are part of every subscription [2]. Planview Anvi goes further inside the product, with agents and scheduled workflows [28]. Beyond chat about documentation it needs an Anvi subscription measured in Anvi AI Units, one unit per answer or agent step [23].

ITM Platform	Planview Portfolios
Included in every account. MCP server with 47 documented tools.	Anvi subscription with consumption units [23]. The MCP server needs an Anvi license [30].

Weeks to first use

ITM Platform offers a 14-day trial from its website and a configuration service with a fixed scope and price that takes about two weeks [3]. Support is part of the license.

Planview offers 30-day trials for AgilePlace and ProjectPlace and demos for Portfolios, AdaptiveWork and PPM Pro [22]. Its FastTrack method has fixed-price packages, with no duration published [35]. G2 reviewers report an average of five months to implement Portfolios and three for AdaptiveWork [47] [48].

ITM Platform	Planview Portfolios
Self-service trial, then about two weeks of standard configuration.	Demo-led evaluation. G2 reviewers report three to five months on average [47] [48].

PRICING

What each product costs

ITM Platform publishes a price list. Planview quotes each customer, and its AWS Marketplace listings give a public reference.

The same team: 25 managers and 100 team members

Every comparison prices this team, with a license for each person who updates tasks or reports time. Prices are per year, before taxes and discounts.

ITM Platform, list price, all included

11,700

USD per year

25 manager licenses at US$39 a month, billed annually. The 100 team members need no paid license. All included in the price: AI, timesheets, project finance, the API, the MCP server, packaged connectors, single sign-on and support. [2]

Planview Portfolios Flex, AWS Marketplace listing

203,525

USD per year

Listed by Planview for 25 managers and 100 team members, on a 12-month contract. [1]

Included in ITM Platform, charged separately by Planview Portfolios

ITM Platform's license price includes each item in this table. The other column shows how Planview Portfolios sells it. Items that ITM Platform does not offer are left out.

	ITM Platform	Planview Portfolios
Connectors	✓ Included	Planview Hub, sold as its own product: US$60,000 a year for 200 users and up to three applications, in its AWS Marketplace listing.[9, 24]
AI use	✓ Included	Planview Anvi is priced by consumption. A subscription includes Anvi AI Units, one used per chat answer or agent step, and unused units expire each contract year.[23]

Both figures are list prices before services and taxes. No other public price was found for Portfolios. The listing itself says to contact Planview for pricing based on your requirements, so a direct quote may differ[1].

ITM Platform list price	Per manager license per month
5 to 49 manager licenses	US$39
50 to 149 manager licenses	US$34
150 or more manager licenses	US$26

Price per manager license per month in US dollars, billed annually; the same figures apply in euros. The tier price applies to every manager license. Team Members, project guests and no-login resources need no paid license, with no limit on their number. The first contract adds a training pack. Private cloud and on-premise deployments add an annual maintenance fee.[2]

Planview Portfolios pricing

- Planview has no pricing page, and its pages for Portfolios, AdaptiveWork and PPM Pro show no price.[20, 16]
- AWS Marketplace listings sold by Planview give public prices for other products: AgilePlace and ProjectPlace at US$240 per user per year, Hub at US$60,000 a year for 200 users and up to three applications, and Viz at US$120,000 a year for up to 200 connected users.[56, 57, 24, 58]
- Planview Anvi is priced by consumption. A subscription includes Anvi AI Units. One unit is used per chat answer or agent step, and unused units expire each contract year.[23]
- Under the public subscription agreement, subscriptions renew automatically, non-renewal needs 60 days' notice and fees cannot be reduced during the term.[21]

What to ask for in a Planview Portfolios quote

A quote can be compared only when it is itemized. Ask for these lines separately:

- Each product in the proposal, with the number and type of users.
- What a person who only reports time or updates tasks costs.
- Planview Anvi: the units included, the price of additional units and what happens when they run out.[59]
- Planview Hub: the connectors and applications included.[24]
- Sandboxes and the support tier. The number of sandboxes depends on the support package.[37]
- Implementation, migration, training and any recurring Planview360 services.[60]
- Renewal terms: uplift, notice period and whether the number of users can go down.

TWELVE CRITERIA

How the two products score

Planview Portfolios scores higher on five criteria: strategy, resources, reporting, security and ecosystem. ITM Platform scores higher on five: services, AI, integrations, pricing and implementation. They are level on project delivery and finance. Portfolios is the Planview product priced on AWS Marketplace. Other Planview products, such as Anvi, Hub and AgilePlace, cover more as separate purchases, and each criterion names them.



Scores from 0 to 5 against the published scale. ITM Platform assessed both products. The criteria are not weighted, so there is no total: weight them by what matters to your organization.

Scoring scale

Score	Meaning	When it applies
5	Complete	Covers the criterion natively, with public evidence and no material gap.
4	Strong	Covers it well. The gaps are minor for most buyers.
3	Partial	Covers the core. Material gaps remain, or the buyer needs configuration work.
2	Limited	Mostly available through development, add-ons or third parties, or only on request.
1	Marginal	Touches the criterion without a usable answer.
0	Not covered	Public evidence shows the criterion is not covered.
Not scored	Insufficient evidence	Public sources do not establish the answer. The reason is given next to the criterion.

THE OTHER SIDE

Where Planview Portfolios is the stronger choice

Planview Portfolios, alone or with other Planview products, is the better choice in the situations below. If one of them is a firm requirement for you, ITM Platform is probably not the right product.

Portfolio planning at enterprise scale

Planview Portfolios scores investments, optimizes a scenario under capacity and funding constraints and manages OKRs across many portfolios. Planview cites NatWest connecting more than 35 portfolios and 4,000 projects. [5, 8]

Depth in scheduling, resources and finance

Portfolios documents eight scheduling constraint types, skills matching with a request and approval process for resources, timesheet approval, and financial plan versions with capital and expense. ITM Platform covers each area with less depth. [5, 7]

A wide product family from one vendor

Enterprise architecture, value stream analytics, idea management, enterprise Kanban and roadmaps are available as Planview products. ITM Platform has none of the first three. [8]

Packaged integrations

Planview Hub has connectors for more than sixty tools and over 300 product versions, in the cloud or on-premises. ITM Platform integrates through its API and extensions, with packaged connectors for nine tools, among them Jira, Microsoft Dynamics, HubSpot and Salesforce. [9]

Certifications, SLA and regions

Planview holds ISO 27001 and ISO 27701 certifications, runs annual SOC 2 audits and publishes a 99.8% availability target with service credits. Portfolios is hosted in four regions. ITM Platform has no vendor-held certificate. [10, 11, 12]

Analyst recognition and scale

Planview reports being named a Leader in two 2026 Gartner Magic Quadrants and in the Forrester Wave for strategic portfolio management. It reports more than 3,000 customers and lists about 139 partners. [13, 61, 14, 19, 15]

Mobile apps and interface languages

AdaptiveWork and ProjectPlace have iOS and Android apps, and Planview products are offered in languages such as German, French and Swedish. ITM Platform is responsive web in English, Spanish and Portuguese. [42, 43, 39]

ITM Platform limitations to weigh

These are the limits of ITM Platform that most often matter in an evaluation against an enterprise suite.

- No native mobile app. The web interface is responsive.
- No SOC 2 or ISO 27001 certificate held by ITM Platform itself, and no public status page.
- No SCIM provisioning. Multi-factor authentication comes from the customer's identity provider.
- No automatic leveling that moves dates, and no skills inventory.
- No story points or scaled agile planning. Sprint velocity appears only in the AI project report.
- Packaged connectors cover a limited set of systems, such as Jira, Microsoft Dynamics, HubSpot and Salesforce. Other systems need a Custom Extension or API work.
- Reports export to Excel only and cannot be scheduled.
- Interface in English, Spanish and Portuguese only.

CRITERION BY CRITERION

The evidence behind each score

Each criterion says why it matters, lists what public sources establish about each product and gives both scores. A closing note explains what the difference means for a PMO. ITM Platform's own limits are the last fact in each list.

1 Portfolio prioritization and strategy

Planview Portfolios leads

The PMO has to show why one project was funded before another, and what the portfolio looks like under a different budget.

ITM Platform

4 / 5

- Business goals are weighted by points, by a qualitative scale or by pairwise comparison (AHP). The pairwise method reports a consistency ratio that flags contradictory judgments. [62]
- Each scenario shows value against cost per project, an efficient frontier chart and a budget limit. Save and Approve writes the approval status to every project in one step. [62]
- Projects and services roll up to programs and one portfolio, with budget, schedule and goals, and status workflows govern approval from idea to closure. [17, 63]
- Limits: scenarios are built inside a program, selection against the frontier is made by hand, one person scores each scenario, and there are no OKR key results or request forms for people without a license.

Planview Portfolios (Planview Portfolios)

5 / 5

- Planview Portfolios scores and ranks investments with configurable models, and an optimization algorithm proposes a portfolio under capacity and funding constraints. [5]
- Planners build what-if scenarios and compare them side by side before approval. [5]
- Strategies, programs, roadmaps and multi-level OKRs are linked to the work that delivers them, and benefits are tracked against plan. [5]
- Requests arrive through configurable forms and lifecycles and are dispatched to projects. [64, 5]
- Pairwise ranking is documented for ideas in IdeaPlace, a separate product, and not for projects. [65]

What the difference means

Both products rank projects against goals, compare scenarios and show an efficient selection under a budget. Planview Portfolios goes further for organizations with several portfolios: an optimizer with constraints, formal demand intake and OKRs. ITM Platform adds pairwise comparison with a consistency check, which helps a committee agree on the weights.

2 Project delivery: waterfall, agile and hybrid

Comparable

Many organizations run planned projects and agile teams at the same time and need both in one report.

ITM Platform

4/ 5

- Gantt with the four dependency types, lead and lag, critical path, unlimited baselines and earned value with three forecast scenarios. [66, 67]
- Kanban boards with sprints, burndown and cumulative flow. Sprints can also be used inside Gantt projects, and both project types share resources, budgets and reports. [17]
- Risks, issues and change requests record their cost, schedule and scope impact. Status workflows support approval rules, including budget thresholds. [63]
- Limits: no automatic leveling that moves dates, no story points, durations in whole days, and a project keeps its type (Gantt or Kanban) after creation.

Planview Portfolios (Planview Portfolios)

4/ 5

- Planview Portfolios schedules with a critical path engine, eight constraint types, total and free float and multiple baselines per project. [5]
- Sprints, story points, velocity and burndown are documented in Portfolios. Kanban boards and WIP limits come from AgilePlace or ProjectPlace, separate products that AWS Marketplace lists at US$240 per user per year. [5, 68, 69, 56, 57]
- Risks, issues and change requests are managed with lifecycles, gates and approvals. [70, 5]
- Earned value is documented metric by metric for PPM Pro and AdaptiveWork. For Portfolios the public pages show variance reports, and the metric list is in customer-only articles. [71, 5]

What the difference means

Planview Portfolios is deeper in scheduling and agile planning, and its Kanban boards come from a second product. ITM Platform covers Gantt with critical path and baselines, Kanban with sprints, and risks with approvals in one product.

3 Resource and capacity management

Planview Portfolios leads

Committing to a date without checking who is free is a common cause of replanning.

ITM Platform

4/ 5

- Demand can be planned by role before people are named, then compared with capacity by day, week, month or quarter. [72]
- Estimates are spread day by day over each person's calendar. Overallocation counts work in every project, and a guided redistribution proposes who can take the hours. [72]
- Timesheets feed actual hours, with non-billable hours kept apart. Managers set the accepted effort that is used for cost and billing without changing what people reported. [73, 74]
- Limits: no skills inventory, no automatic leveling that moves dates, and no submit step for timesheets.

Planview Portfolios (Planview Portfolios)

5/ 5

- Planview Portfolios distinguishes requirements, reserves, allocations and authorizations, so demand is planned by role or skill before a person is named. [5]
- Skills are used to match people to requirements, and resource managers approve or deny requested assignments. [5, 6]
- Capacity is compared with demand in planning scenarios and reports. [70]
- Timesheets have an approval step and can be entered and approved from a mobile site. [7, 75]

What the difference means

Planview Portfolios is deeper for large resource pools: skills matching, a formal request and approval process, and timesheet approval. ITM Platform plans demand by role, shows capacity per person and week and proposes how to redistribute hours. That covers PMOs that plan tens or a few hundred people.

4 Financial management

Comparable

Finance and the PMO need the same cost, revenue and margin figures without rebuilding them in spreadsheets.

ITM Platform

4/ 5

- Every project and service shows the top-down budget, the bottom-up estimate, actuals and the last period close side by side, with margin in each.[52]
- Dated cost and bill rates, purchases with CSV import from the ERP, revenue records, time-and-materials revenue and five revenue recognition methods.[53]
- Period close locks reported hours and produces closing documents per provider. Every amount stores its currency and exchange rate.[52]
- Baselines keep budget, purchases and revenue with the schedule, and earned value can include purchases.[67]
- Limits: no month-by-month cost budget, no customer invoicing or purchase orders, and exchange rates are entered by hand or updated by an extension.

Planview Portfolios (Planview Portfolios)

4/ 5

- Financial plans in Planview Portfolios hold several versions (budget, forecast, actuals, baselines) that can be compared and locked, and they are time-phased.[5]
- Capital and expense are separated, with depreciation, and amounts can use several currencies with exchange rate sets by period.[70, 5]
- Labor cost comes from rate sets and rate cards. Other costs are entered as planned and actual expenditures.[5]
- Revenue recognition is documented for AdaptiveWork, by billing type. It is not documented in the public pages of Portfolios.[76]

What the difference means

Planview Portfolios is stronger at planning investment across portfolios over time. ITM Platform is stronger at project accounting: rates, purchases, recognized revenue and margin per project and client, closed by period.

5 Services and non-project work

ITM Platform leads

Support, maintenance and operations use the same people as projects, so capacity figures that leave them out overstate who is free.

ITM Platform

5/ 5 ●●●●●

- Services are a component type for continuous work. Each has activities, a team, a budget, purchases, revenue and its own status workflow. [17]
- Services appear in the same portfolio, programs, capacity views and reports as projects, so non-project work counts against the same people. [17]
- Clients and providers have their own records, with revenue, cost and margin per client. [17]
- Limits: services have no Gantt and no risk register.

Planview Portfolios (Planview Portfolios)

3/ 5 ●●●○○

- In Planview Portfolios, non-project work is modeled as standard activities, support tickets and other work types that use the same capacity as projects. [5, 70]
- Customers have their own records, linked to work and to contracts. [5]
- Billing and revenue recognition for client services are documented for AdaptiveWork, a separate product. [76]

What the difference means

Both products count non-project work against the same capacity. ITM Platform also gives each service its own budget, revenue and margin. In Planview, the financial side of client services is in AdaptiveWork or ChangePoint, separate products.

6 Reporting and analytics

Planview Portfolios leads

A PMO often starts looking for a tool because its monthly portfolio report is assembled by hand.

ITM Platform

4/ 5 ●●●●○

- Report builder with seven report types, from projects and tasks to purchases, revenue and time, with custom fields, live data and Excel export. [17]
- Custom dashboards with six chart types and global filters, shared by user or role, plus pre-built dashboards for the portfolio and for each project, service and client. [17]
- Free Power BI templates, and a GraphQL analytics API (DataMart) about one minute behind live data, both included in the price. [77, 31]
- A weekly AI report on each subscribed project arrives by email, and every list exports to Excel. [27]
- Limits: reports export to Excel only, have no charts and cannot be scheduled, dashboards have no drill-down, and there is no certified Power BI connector.

Planview Portfolios (Planview Portfolios)

5/ 5 ●●●●●

- Planview Portfolios includes more than 200 reports and visualizations, a report builder and configurable dashboards. [16, 78, 5]
- Power BI reports can be embedded as tiles, and an OData service and a data mart are available for analysis. [79, 80, 5]
- Reports can be sent to users on a schedule. [81]
- Value stream analytics is a separate product, Planview Viz. [8, 58]

What the difference means

Planview Portfolios offers more ready-made reports, scheduled delivery and embedded business intelligence. ITM Platform includes a report builder, custom dashboards, free Power BI templates and an analytics API in the price, and leaves advanced analysis to Power BI.

7 AI and agents

ITM Platform leads

Buyers now ask what the AI does with their own portfolio data, who is allowed to use it and what it costs.

ITM Platform

4 / 5

- PMPilot is on every screen and in Microsoft Teams. It answers product and method questions for every user, and questions over live portfolio data as tables for manager licenses, limited to what each user may see. [27]
- AI drafts a plan from a prompt or a meeting transcript, with dependencies and durations. It also writes a weekly report for each subscribed project and can answer from the customer's own methodology. [27]
- An MCP server with 47 tools, 27 that read and 20 that write, lets agents in Claude, ChatGPT, Microsoft Copilot Studio or Cursor create projects and tasks, log time and update progress, risks and issues. It uses OAuth 2.1, applies each user's permissions and logs every call. [4, 82]
- All of it is included in the subscription, with no AI credits or usage meters. Extensions can also call a language model inside an automation. [2, 27]
- Limits: the in-app assistant does not write data, the model provider is OpenAI, and Team Members cannot use data analysis or MCP.

Planview Portfolios (Anvi sold separately)

2 / 5

- Planview Anvi answers questions, updates projects, generates status reports and runs custom agents on a schedule. [28]
- An agent is a collection of up to five prompts. Anvi uses Anthropic models through Amazon Bedrock, and customer data is not used to train generative models. [23, 83, 28]
- Since September 2026 an Anvi MCP server lets external assistants talk to Anvi to read and change data. It needs an Anvi license. [29, 30]
- Only chat about product documentation is included with the products. Other Anvi features need a subscription measured in Anvi AI Units, one unit per answer or agent step. [23]

What the difference means

Anvi does more than PMPilot inside the product: it changes data and runs agents. It is a separate subscription priced by consumption, with no public price, so it does not raise the score. ITM Platform includes all its AI in the license, with an MCP server whose 47 tools are documented.

8 Integrations and extensibility

ITM Platform leads

The PPM tool has to exchange data with the ERP, the ticketing system and the tools development teams already use.

ITM Platform

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- Public REST API with 358 documented operations and no charge per request. A GraphQL analytics API and an MCP server are included too.[31]
- Extensions change how the product behaves, much like plug-ins. Each is a script that runs inside ITM Platform when a record is created, changed or deleted, on a schedule, or when another system calls its webhook. It can stop a save and tell the user why, call REST or SOAP services, send email or ask a language model.[32, 34]
- Customers, partners or ITM Platform write extensions, for example to enforce an approval rule. The editor is in every subscription. An administrator installs a packaged extension from the extensions panel and fills in its settings form. The Microsoft Dynamics, HubSpot, Salesforce, Zendesk and Help Scout connectors are built this way.[2, 3, 34]
- Packaged connectors for Jira (Cloud and Data Center, both directions), Zendesk, Help Scout, Microsoft Project files, Microsoft Teams and Power BI.[32]
- Limits: packaged connectors cover a limited set of systems, such as Jira, Microsoft Dynamics, HubSpot and Salesforce, and there are no calendar or Git connectors. Other systems need a Custom Extension or API work.

Planview Portfolios (Hub sold separately)

3 / 5

- Planview Hub has connectors for more than sixty tools and over 300 product versions, in the cloud or on-premises.[9]
- Hub is a product of its own. AWS Marketplace lists it at US$60,000 a year for 200 users and up to three applications.[24]
- AdaptiveWork has a REST API for Enterprise edition customers, outbound webhooks and a marketplace of integrations and add-ins.[84, 85, 33]
- Portfolios has REST, SOAP and OData interfaces, documented for signed-in customers.[86, 87, 88]

What the difference means

Planview Hub gives the wider catalog of packaged connectors, as a separate product listed at US$60,000 a year. Without it, Portfolios offers REST, SOAP and OData interfaces. ITM Platform includes its REST API, analytics API and MCP server in the price, with packaged connectors for Microsoft Dynamics, HubSpot and Salesforce, and extensions that connect other systems on record events, schedules or webhooks.

9 Security, compliance and hosting

Planview Portfolios leads

Procurement and IT security can stop a purchase that the PMO has already chosen.

ITM Platform

4 / 5

- Hosted on Microsoft Azure in West Europe, whose ISO 27001 and ISO 27701 certificates cover the infrastructure, with encryption in transit and at rest. Personal data is processed under the GDPR. [40, 89, 41]
- The security and service documentation given to customers commits to 99.95% availability, an external security assessment every quarter and a yearly disaster recovery test that restores service within two hours.
- SAML 2.0 single sign-on with any identity provider is included in the price. A single-tenant private cloud in the Azure region the customer chooses and an on-premise installation are available for an annual maintenance fee on top of the same license prices. [25]
- Limits: ITM Platform holds no SOC 2 or ISO 27001 certificate of its own and has no public status page. It has no SCIM provisioning, and multi-factor authentication comes from the customer's identity provider.

Planview Portfolios (all Planview products, with scope that varies)

5 / 5

- Planview is certified for ISO 27001 and ISO 27701 and runs annual SOC 2 audits. The scope is defined per product. [10, 21]
- A public service level agreement sets a 99.8% monthly availability target, with service credits. [11]
- Hosting regions depend on the product. Portfolios runs in the United States, the United Kingdom, Germany and Australia. [12]
- Single sign-on is available across products. SCIM provisioning is documented for AdaptiveWork and AgilePlace. [90, 91, 92]

What the difference means

Planview brings vendor-held certificates, a published SLA with service credits and a choice of regions in the standard service. ITM Platform holds no certificate of its own and answers data residency and isolation requirements with a private cloud in the Azure region the customer chooses, or an on-premise installation.

10 Pricing, licensing and packaging

ITM Platform leads

A budget holder needs a number before the first sales call, and needs to know what makes it grow.

ITM Platform

5 / 5

- Public price list: US$39, 34 or 26 per manager per month depending on volume, billed annually, with a minimum of five manager licenses. [2]
- Team Members, project guests and no-login resources need no paid license, with no limit on their number. [2, 93]
- One product and one edition. Portfolio, finance, resources, agile, AI, the API, the MCP server, single sign-on and support are all in the same license. [2]
- The first contract adds a training pack of 4, 6 or 10 hours. [3]

Planview Portfolios (all Planview products)

2 / 5

- Planview has no price list. Buyers ask for a quote. [20]
- AWS Marketplace lists Portfolios Flex at US$203,525 a year for 25 managers and 100 team members. [1]
- Products are licensed separately, and Anvi AI is a consumption-based subscription. [8, 23]
- Under the public agreement, subscriptions renew automatically and fees cannot be reduced during the term. [21]

What the difference means

With ITM Platform a buyer can calculate the license cost for any team size before talking to sales. With Planview the cost depends on which products, user types, AI units and connectors are in the proposal, so an itemized quote is needed to compare.

11 Implementation and time to value

ITM Platform leads

In the first year, much of the cost of a PPM tool is the time it takes to get people using it.

ITM Platform

5 / 5 ●●●●●

- A 14-day trial starts from the website without a sales call or a credit card, and a public demo company shows the product with sample data. [2]
- The Standardized Configuration service has a fixed scope and price and takes about two weeks: assessment, configuration model, basic configuration and six hours of user training. [3]
- Support is included in the license, free online courses run every two weeks, and PMPilot answers how-to questions on every screen. [3, 27]
- Reviewers on Software Advice rate ease of use 4.4, value for money 4.5 and customer support 4.6 of 5, from 105 reviews. [50]
- Limits: data migration and integrations are quoted separately, and bulk loads of projects or users go through the API or support. [3]

Planview Portfolios (Planview Portfolios)

3 / 5 ●●●○○

- Planview's FastTrack method offers fixed-price packages. No duration is published. [35, 36]
- Trials exist for AgilePlace and ProjectPlace. The PPM products are evaluated through demos. [22]
- G2 reviewers report an average of five months to implement Portfolios and three for AdaptiveWork. [47, 48]
- Standard support can send configuration and how-to questions to Professional Services, which may be billable. [38]

What the difference means

A PMO can try ITM Platform on its own and have a standard configuration in about two weeks. A Planview rollout is a project led by its services team or a partner, sized for the larger scope that enterprise customers usually have.

12 Ecosystem and customer base

Planview Portfolios leads

Large organizations weigh the partner network, the customer base and analyst coverage as part of the risk.

ITM Platform

3 / 5

- ITM Platform has sold the product since 2011. Its strongest presence is in Spain and Latin America.[18]
- Standard and advanced partners resell and implement the product. The vendor builds custom extensions and product changes for customers, and offers a managed PMO service.[3]
- Limits: a smaller partner network and customer base than an enterprise vendor, and online support 12 hours a day, 5 days a week.

Planview Portfolios (Planview)

5 / 5

- Planview reports more than 3,000 customers and 3.1 million users.[19]
- It reports being named a Leader in the 2026 Gartner Magic Quadrants for Strategic Portfolio Management and for Adaptive Project Management and Reporting, and in the Forrester Wave for strategic portfolio management tools.[13, 61, 14]
- Its partner finder lists about 139 partners.[15]

> What the difference means
>
> Planview has analyst coverage, more than 3,000 customers and about 139 listed partners. ITM Platform offers a direct relationship with the team that builds the product, which also builds extensions and custom features as a service.

IMPLEMENTATION, SERVICES AND SUPPORT

Getting from contract to daily use

What each vendor publishes about getting started, and what users report.

ITM Platform

- Trial: 14 days, self-service from the website, without a credit card. A public demo company shows the product with sample data.[2]
- Standardized Configuration: assessment, configuration model, basic configuration and six hours of training in about two weeks, at a fixed price.[3]
- Training: a pack of 4, 6 or 10 hours with unlimited attendees is part of the first contract.[3]
- Support: included in the license, online, 12 hours a day and 5 days a week.[2]
- Outside the standard service: data migration, integrations and process consultancy, each quoted separately.[3]

Planview Portfolios

- Trials: 30 days for AgilePlace and ProjectPlace. Portfolios, AdaptiveWork and PPM Pro are shown through demos.[22]
- Method: FastTrack, in five phases, with fixed-price packages for common needs. Planview publishes no duration or price for them.[35, 36]
- User reports: G2 reviewers report five months on average to implement Portfolios, three for AdaptiveWork and five for PPM Pro.[47, 48, 94]
- Support: standard support is by portal and email, 24 hours a day and 5 days a week, for named administrators. Functional questions, configuration and custom reports can be sent to Professional Services and may be billable.[37, 38]
- Ongoing services: Planview360, a recurring subscription to Planview experts in four tiers, from up to 10 to up to 120 hours a week.[60]

Implementation time depends on scope. The G2 figures are reviewer averages, mostly from large organizations, and not a Planview commitment.

CAPABILITY DETAIL

Capability by capability

Each row states what public documentation establishes for each product. A row that another Planview product covers names that product, because a capability of one Planview product is not a capability of the others.

Yes · Partial · Add-on · No · Not documented

Yes: in the product compared, shown by documentation, release notes, contract terms or a recorded demo. Partial: available with a limitation stated on the same line. Add-on: provided by a higher plan, another product of the same vendor, a separately licensed component or a marketplace app from another vendor, named on the same line. Not documented: the vendor's public documentation does not describe it in the product compared, or only a product page names it. Ask the vendor to show it.

Capability	ITM Platform	Planview Portfolios
STRATEGY AND PORTFOLIO		
Strategic goals linked to projects and programs	Yes	Yes Strategies, programs and outcomes linked to work [5, 95]
Weighted scoring of projects	Yes	Yes Scoring models and automatic ranking [5, 96]
Pairwise comparison (AHP) with consistency check	Yes	Not documented Not documented for projects. Pairwise ranking is documented for ideas in IdeaPlace [65]
What-if scenarios	Yes Several scenarios per program, each with its own weights, scores and selection. Save and Approve sets each project's approval status	Yes Shared and what-if scenarios across the portfolio [5, 97]
Efficient frontier or portfolio optimization	Yes Efficient frontier computed over every combination, up to 27 components. The selection is made by hand	Yes Optimization of a scenario under constraints [5, 98]
OKRs with key results	Partial Weighted business goals linked to projects and programs, without key results	Yes Multi-level OKRs [5, 95]
Demand intake forms	Partial Ideas are draft projects with their own fields, scored in scenarios and approved through the status workflow. No request form for people without a license	Yes Request forms with conditional logic, scoring and dispatch to projects [64, 5]
Programs with budget and schedule roll-up	Yes	Yes Programs with their own business case, schedule and cost roll-up [5, 97]
Roadmaps	Yes Portfolio and program Gantt with dependencies between projects	Yes Strategic roadmaps. Roadmaps is also a separate product [5, 99]
Benefits tracking	Yes Expected benefit and ROI per project. Planned and realized financial benefits as dated revenue records	Yes Planned against actual benefits [5, 100]
PLANNING AND CONTROL		

Capability	ITM Platform	Planview Portfolios
Gantt with FS, SS, FF and SF dependencies, lead and lag	✓ Yes	✓ Yes Lag and lead are documented. The dependency type names are in customer-only articles [5, 70]
Critical path	✓ Yes	✓ Yes Critical path scheduling engine, with total and free float [5]
Baselines	✓ Yes Unlimited, including budget, purchases and revenue	✓ Yes Multiple baselines, one active [5, 70]
Earned value	✓ Yes PV, EV, AC, CPI and SPI per project, with three forecasts. No portfolio roll-up	◐ Partial Variance reports in public pages. The metric list is in customer-only articles. PPM Pro documents ten metrics [5, 71]
Microsoft Project import and export	✓ Yes Imports .mpp with tasks, dependencies and dates. Exports Microsoft Project XML, which Project opens and saves as .mpp	✓ Yes Add-in for Microsoft Project desktop [101, 102]
Project templates	✓ Yes A model project is copied with the parts you choose; dates move to the new start	✓ Yes Project and schedule templates [103, 104]
Risk register with probability and impact	✓ Yes	✓ Yes Impact, likelihood and response plan [70, 105]
Issues and change requests	✓ Yes Change requests are an issue type	✓ Yes Issues and change requests with impact and approvals [5]
Status workflows with approval rules	✓ Yes One, N of M or all approvers, with budget conditions	✓ Yes Lifecycles with steps, roles and approvals [5]
Stage gates	✓ Yes Statuses with approval rules act as gates. No deliverable checklist	✓ Yes Gates inside lifecycles [5, 106]
AGILE AND HYBRID		
Kanban boards with swimlanes	✓ Yes	⊕ Add-on AgilePlace or ProjectPlace. Connected to Portfolios [69, 107]
WIP limits	✓ Yes Limit per column; the column header turns red when it is exceeded	⊕ Add-on AgilePlace. Also an indicator on ProjectPlace boards [108]
Sprints and backlog	✓ Yes	✓ Yes Sprints and a backlog view [5, 70]
Burndown and cumulative flow	✓ Yes	✓ Yes Sprint burndown in Portfolios. Flow metrics in AgilePlace [109]
Story points and velocity	◐ Partial Burndown and cumulative flow, and sprint velocity in the AI project report. No story points field	✓ Yes Story points per sprint and a sprint velocity tile [68]
Agile and waterfall projects in one portfolio and one capacity plan	✓ Yes	✓ Yes Several work types in one work portfolio. Kanban teams connect from AgilePlace [110, 5]

Capability	ITM Platform	Planview Portfolios
Scaled agile planning (SAFe, PI planning)	⊖ No	⊕ Add-on AgilePlace. Planning series for program increments [5]
RESOURCES AND TIME		
Demand by role before naming people	✓ Yes	✓ Yes Requirements by role or skill, then reserves and allocations [5]
Capacity against demand views	✓ Yes	✓ Yes In planning scenarios and reports [70, 5]
Overallocation across all projects	✓ Yes	✓ Yes Over-utilization shown in capacity planning [5, 70]
Skills-based search	◐ Partial Free capacity by professional category in the resource views. No skills inventory	✓ Yes Skills used to match people to requirements [5, 6]
Automatic resource leveling	◐ Partial Redistribution proposes moving hours to people with free capacity. Dates do not move	◐ Partial A resource scheduling engine is described. The detail is in customer-only articles [5, 111]
Timesheets	✓ Yes	✓ Yes Including non-project time [70, 5]
Timesheet approval cycle	◐ Partial Managers accept the hours used for cost and billing, and period close locks them. No submit step	✓ Yes Sign, submit and approve [7, 112]
Billable and non-billable time	✓ Yes Logged separately; non-billable hours stay out of time-and-materials revenue	◐ Partial Configurable: a customer-defined activity attribute splits billable time in reports [113]
FINANCIALS		
Top-down and bottom-up budgets with actuals	✓ Yes	✓ Yes Financial plan versions that can be compared and locked [5, 114]
Time-phased budget by month	◐ Partial Estimated and actual hours by month per project and person, and revenue recognized by month. No monthly cost budget	✓ Yes On the enterprise and fiscal calendar [5]
Dated cost and bill rates	✓ Yes	◐ Partial Rate sets and rate cards. Effective dating is not confirmed in public pages [5]
Purchases and external costs	✓ Yes CSV import of actuals from the ERP	◐ Partial Planned and actual expenditures. No purchase order object is documented [5, 115]
CAPEX and OPEX classification	◐ Partial Through purchase types, budget accounts or custom fields	✓ Yes Capital and expense, with depreciation [70, 5]
Multi-currency	✓ Yes Exchange rates entered manually or by extension	✓ Yes Exchange rate sets by period [5, 116]
Revenue and margin per project	✓ Yes	◐ Partial Revenue and benefit planning and a contracts module. Profit per project is documented for AdaptiveWork [5, 117]

Capability	ITM Platform	Planview Portfolios
Revenue recognition	Yes Five methods	Add-on AdaptiveWork. By billing type. Not documented for Portfolios [76]
Customer invoicing	Partial Billable hours and time-and-materials revenue by month, with billed marks against double billing. Invoices are issued in the ERP	Not documented No invoice object is documented for Portfolios
Period close	Yes	Partial The forecast period advances monthly and versions can be locked. AdaptiveWork has a fiscal month close [5, 118]
SERVICES AND OPERATIONS		
Ongoing services managed alongside projects	Yes	Yes Standard activities, support tickets and other work types use the same capacity [5, 70]
Client records with profitability	Yes	Partial Customer records linked to work and contracts. Profit per customer is not documented [5, 119]
REPORTING AND ANALYTICS		
Report builder	Yes Seven report types with custom fields. Excel export, no charts	Yes Library of standard reports and a report builder [78, 5]
Custom dashboards	Yes Six chart types, no drill-down	Yes Configurable tiles and dashboards per portfolio [5]
Power BI	Yes Free templates over the API	Yes Embedded as tiles [79, 120]
Analytics API or data export	Yes GraphQL DataMart, included	Yes OData service and data mart [80, 5]
Scheduled report delivery	Partial Weekly AI project report by email. Scheduled extensions can email summaries	Yes Report subscriptions [81, 121]
AI		
Assistant inside the product	Yes	Add-on Anvi. Chat about documentation is included. Chat about your data needs an Anvi subscription [23]
Questions over live portfolio data	Yes Manager licenses, scoped to each user's permissions	Add-on Anvi. Anvi subscription [23, 28]
AI-generated plans	Yes	Not documented
AI status reports	Yes Weekly subscription per project	Add-on Anvi. Status reports and executive summaries [28]
Configurable agents inside the product	Partial Extensions call a language model on record events or on a schedule and act on the answer. No agent builder	Add-on Anvi. Up to five prompts per agent, run manually or on a schedule [23]
MCP server	Yes 47 tools, read and write	Add-on Anvi. Since September 2026. Needs an Anvi license [30]

Capability	ITM Platform	Planview Portfolios
AI included in the base price	✓ Yes	◐ Partial Anvi. Only chat about documentation [23]
INTEGRATIONS		
Public REST API	✓ Yes 358 operations	✓ Yes REST and SOAP [86, 87]
Webhooks	✓ Yes Inbound per extension; extensions call a URL on record events	◌ Not documented Not documented for Portfolios. AdaptiveWork has outbound calls [85]
Automation and custom extensions	✓ Yes Scripted extensions on record events, schedules and webhooks; can stop a save. No visual builder	✓ Yes Lifecycles and scripted dialogs [5]
Jira connector	✓ Yes Included. Import and export with Jira Cloud and Jira Data Center	⊕ Add-on Hub. Planview Hub connector [9]
ERP and CRM connectors	◐ Partial Microsoft Dynamics, HubSpot and Salesforce connectors built as extensions. Other systems through extensions or the API	◌ Not documented Not documented. The product page lists SAP, Oracle, NetSuite, Salesforce, Workday and ServiceNow without describing them or saying which need Hub [16]
Integration hub with a connector catalog	◐ Partial Packaged connectors installed from the extensions panel with a settings form	⊕ Add-on Hub. More than 60 connectors, sold as its own product [9, 24]
SECURITY AND DEPLOYMENT		
Single sign-on (SAML)	✓ Yes Included	✓ Yes Planview Admin. SAML, shared across products [122, 123]
SCIM user provisioning	⊖ No	◐ Partial AdaptiveWork and AgilePlace. Not supported through Planview Admin, which covers Portfolios and PPM Pro [122, 91]
ISO 27001 or SOC 2 held by the vendor	⊖ No	✓ Yes Planview. ISO 27001, ISO 27701 and annual SOC 2 audits [10]
Choice of hosting region	◐ Partial West Europe as standard; any Azure region in private cloud	✓ Yes United States, United Kingdom, Germany and Australia [12]
On-premise installation	✓ Yes Annual maintenance fee	◐ Partial A separate on-premises agreement exists. It does not name the products [26]
Single-tenant private cloud	✓ Yes Annual maintenance fee	◌ Not documented The agreement mentions single-tenant hosting without naming products [21]
Public status page	⊖ No	✓ Yes Planview. Per product and region [12]
Native mobile app	⊖ No Responsive web	◐ Partial AdaptiveWork and ProjectPlace. Portfolios has a mobile site for time and approvals [42, 75]
COMMERCIAL		

Capability	ITM Platform	Planview Portfolios
Public list price	Yes	Partial No price list. AWS Marketplace listings for five products [20, 1]
Free licenses for team members	Yes Unlimited	Not documented License types and prices are set per product in each order [21]
Self-service free trial	Yes 14 days	Partial AgilePlace and ProjectPlace. 30 days. Demos for the PPM products [22]
All modules in one edition	Yes	No Products are licensed separately, and AdaptiveWork has editions [8, 84]

MOVING FROM PLANVIEW PORTFOLIOS

What a move from Planview Portfolios to ITM Platform involves

ITM Platform has no packaged migration tool for Planview products. A move is a small project that ITM Platform or a partner scopes with you. This is how each kind of data usually moves.

Data	How it moves to ITM Platform
Projects and programs	Created through the REST API or the MCP server from an export of the current product. The portfolio structure and the programs are set up first.
Schedules	Plans available in Microsoft Project format are imported with their tasks and dependencies. Resources and assignments are added afterwards, because the import does not bring them.
People, roles and rates	Users, professional categories and dated cost and bill rates are loaded through the API or by ITM Platform support.
Budgets and purchases	Budgets are entered per project or loaded through the API. Actual purchases can be imported from a CSV file per project.
Time history	Most organizations keep past timesheets in the old product as an archive and start actuals in ITM Platform from a cut-over date. Time entries can also be written through the API.
Reports and dashboards	Rebuilt with the report builder, the dashboards or the Power BI templates.
Integrations	Rebuilt with extensions or the API. Jira has a packaged connector.
Workflows and custom objects	Rebuilt as statuses, approval rules and custom fields. Custom objects have no direct equivalent.

Before planning the move, ask Planview which export formats your contract includes. Its public agreement allows a fee for data retrieval after termination [21].

METHOD AND SOURCES

How we compared the two products

How to read this page

The first part of the page gives the answer: who each product fits, what each costs, how they score and where Planview Portfolios is stronger. The second part holds the evidence for each score, the capabilities one by one and questions for both vendors.

Numbers in brackets link to the sources at the end of the page. ITM Platform wrote this page, so treat the scores as one vendor's assessment and check the sources that matter to you.

How this comparison was made

1. The same twelve criteria are used for every product. They group the categories of ITM Platform's public PPM checklist and add security and the vendor's ecosystem.
2. Statements about Planview Portfolios come from public sources: the vendor's documentation, release notes, recorded demos, legal terms and marketplace listings, then review sites and analysts. A capability named only on a product page or in a brochure is marked not documented. Each source carries a numbered link and the date we consulted it.
3. Scores go from 0 to 5 against a published scale. A product is scored on what public sources establish. Where they do not establish the answer, the item is marked not scored or not documented: ask the vendor to show it. A capability that works the same way in both products gets the same mark.
4. Scores refer to the product whose price is shown. When a gap is covered by another product of the vendor, a paid add-on or a marketplace app from another company, the page names it with its price. It raises the score only when its price is included in the comparison.
5. We did not run a hands-on test of Planview Portfolios. Statements about ITM Platform come from its documentation and from the product.
6. The criteria are not weighted and there is no total. Weight them by what matters to your organization.
7. Where Planview Portfolios is stronger, the page says so. ITM Platform's own limitations are listed too.

Who wrote it

ITM Platform wrote and paid for this comparison and makes one of the products compared. Read it as a vendor's assessment and check the sources.

We check the facts for changes every month, and sooner when Planview changes pricing or ships a major release. The date at the top of the page is the month of the last check.

If a statement is wrong or out of date, send us the correction with a public source. We correct verified errors.

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