

Configuration and Initial Load

ITM Platform



ITM Platform
PROJECTS ▪ PROGRAMS ▪ PORTFOLIO



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Introduction

In order to best adapt ITM Platform to your needs, you can configure the system to perfectly suit your organization and the terminology you use.

This manual describes how to complete the initial configuration step-by-step, as ITM Platform includes a series of default values that allow you to start using the tool as quickly as possible.

You can start using ITM Platform as soon as you open it but gradually customize the values you are most interested in as you start using them, or even check the parameters you will need beforehand and configure the platform so it suits your needs perfectly from day one.

In order for users at your organization to best customize the product during the initial implementation stage, we recommend you pay special attention to the most commonly used terminology. This will facilitate the change management process as people will recognize the language they have been using up until this point (the *project types*, for example).

1 Company

1.1 General Company Settings

[CONFIGURATION](#) > [ORGANIZATION](#) > [General Company Settings](#)

The following general company settings can be customized to your organization:

- **Company Name:** The name of the company as you want it to appear in the system, reports, etc.
- **My Language:** This is the language that you set as the default for the organization, although each user can personalize their environment to another language. The languages currently available are English, Spanish and Portuguese.
- **URL Name for Company:** Customization of the web address that ITM assigns for hosting the environment of the organization.
- Various fields for saving the **Address** of the organization to appear on invoices and other documents.
- **Max File Size Upload:** This restricts the size of the documents that can be uploaded to ITM Platform.
- **Min Password Length:** This sets the minimum number of characters that access passwords must contain.
- **Logo:** The logo of the organization to be displayed in the environment. This must be square (if your logo has a design that is predominantly horizontal or vertical, a version with the necessary blank space will need to be created). The system will adjust it during the upload process to 186x186 pixel size.
- **Standard Payment Period:** This is the maximum number of days for standard payments by the organization.
- **Tax %:** the tax percentage used by the organization. This Value Added Tax varies from country to country and, for example, the maximum rate in Spain stands at 21%, in Costa Rica at 13% and in Mexico at 16%.
It is important to note that this figure can be configured separately for each registered supplier.
- **Base Currency:** This is the main currency used by the organization, which will be converted into the other currencies with which ITM Platform can be used (based on the exchange rates).

IMPORTANT: The **base currency** is the only value that remains fixed following the initial configuration and cannot be changed.

- **Fiscal Details:** such as the start and end months for the fiscal period or financial year we are in.

1.2 Working Hours

[ORGANIZATION](#) > [USER MANAGEMENT](#) > [Working Hours](#)

ITM Platform uses the number of working hours to perform effort estimates:

- **Timetables:** as many timetables as necessary can be configured here, although you will need to include at least one.
- **Working Hours:** for defining the number of hours worked each day of the week within the timetables. There is no need to set the start and finish times for staff or possible shifts, just the number of hours.

1.3 Calendars

[ORGANIZATION](#) > [USER MANAGEMENT](#) > [Calendars](#)

ITM Platform uses the calendars assigned to each user for performing effort estimates based on the defined working days.

- **Calendars:** as many calendars as necessary can be configured here, although you will need to include at least one calendar. Users will need to have one calendar assigned, which will be the one used to reflect the non-working days for all users. Additional calendars may also be assigned to them.
- **Working Days:** each calendar will set the non-working days for the users to whom that calendar is assigned. A CSV file can be imported to automatically upload the non-working days.

2 Organization

2.1 Business Processes

[ORGANIZATION > OBJECTIVES & PROCESSES > Business Processes](#)

The system allows the organization's business processes to be shown according to the following schema:

- **Value Chain**
 - **Activity**
 - **Process**

More than one **Value Chain** can be defined. Each chain contains the **Activities** (main or support) that, in turn, contain the specific **Processes** on which the organization is based.

If the company has a process classification that can be organized according to this schema and it is reflected in the system, then the services, projects and costs can be assigned to the various processes.

If this is not the case, this data will not be necessary for ITM Platform to function. Neither the creation of a process map just for the system, nor the inclusion of one that is not shared and widely implemented throughout the organization is recommended.

2.2 Business Goals

[ORGANIZATION > OBJECTIVES & PROCESSES > Business Goals](#)

ITM Platform can be used to reflect objectives that are normally contained in the Business Plan of the organization and assign services, projects and costs to those objectives.

The system can contain various **Business Plans**, usually based on date ranges (Plan 2012-2013), activity areas (International Expansion Plan or Local Development Plan) or any other criteria established by your organization for the setting of objectives.

Each Business Plan includes the **Business Goals** that can be associated to projects, services and programs.

2.3 Scope of Contribution to Business Goals

[ORGANIZATION > OBJECTIVES & PROCESSES > Business Goal Categories](#)

ITM Platform allows business goals to be classified according to what they contribute.

The default values are:

- Cost reduction
- Grow the business
- Run the business
- Transformation

These values can be modified to suit the terminology and needs of your organization. We recommend using these default values if you have no other classification.

2.4 Organizational Structure

[CONFIGURATION](#) > [ORGANIZATION](#) > [Organization Units](#)

This section defines the **hierarchical structure of Areas and Departments**, or organigram.

When describing the **Business Areas**, it is recommended to only reach the level of classification that is necessary for identifying the recipients of projects and services. The organizational structure reflected will be used to define the owners and recipients of the vast majority of the activities contained in the system, meaning it needs a level of details to suit this purpose.

The **project execution departments** (for example, an IT or operations department) must be included in the organizational structure as any other would be. In this case, it is recommended to describe the organization in good detail because ITM Platform users will be later assigned to these departments and the specific areas contained within each one.

At any event, the use of an organizational structure that is widely known by the organization is recommended rather than reflecting organizational structures that are only used by one department or that are unknown or not widely used throughout the organization because they relate to future changes (the system should not be the way in which the organization is made aware of such changes).

2.5 Work Groups

[CONFIGURATION](#) > [ORGANIZATION](#) > [Work Groups](#)

If your organization has a matrix structure or **multi-departmental (cross-department) work groups** have been created, ITM Platform allows users to be grouped together into such groups. Such groupings do not constitute part of the organizational structure itself.

Users can be in various work groups but can only belong to one node of the organizational structure.

2.6 Professional Categories

[ORGANIZATION](#) > [COSTING](#) > [Categories and Rates](#)

ITM Platform uses a **professional category classification**. Work group members will be assigned a professional category in the system to identify their usual role.

The use of categories that are widely recognized by the organization is recommended or, if not, categories that are typically accepted in the profession, such as *programmer*, *analyst*, *systems technician*, etc. Using such professional categories as *A1*, *B2*, *C1*, etc. should be avoided unless they are well known to the organization and service providers.

The professional categories are applied to both internal and external personnel. For example, it is possible to have *internal programmers* and *external programmers*, but only *programmer* will be included as a professional category.

3 Standard Costs and Rates

ITM Platform uses a series of standard costs and rates to perform cost estimates based on the effort planned or made in the services and projects. These standard costs and rates are organized as follows:

3.1 Input Cost and Output Cost

[ORGANIZATION > COSTING > Categories and Rates > Categories Standard Cost](#)

Two values can be entered into the costs:

- **Input Cost:** this corresponds to the cost incurred by the organization for a certain resource.
- **Output Cost:** this corresponds to the cost that will be allocated in the event of cost allocation.

It is possible that your organization does not allocate costs, in which case the same value can be used for both types.

3.2 Global Standard Cost

[ORGANIZATION > COSTING > Categories and Rates > Global Standard Cost](#)

The standard global costs will be used when the resources to be allocated to a certain task and what their professional category will be are unknown:

- **Team (General):** average cost per hour of any resource, regardless of whether it relates to internal or external personnel.
- **Internal personnel:** the average cost per hour of internal resources.
- **External personnel:** the average cost per hour of external resources working on the provision of services.

3.3 Standard Cost per Professional Category

The standard cost per internal personnel category is always used for internal personnel, avoiding the identification of direct costs for each internal resource.

In the case of external personnel, when a professional category is identified (*programmer*, for example) but the supplier that will provide the resource is still unknown and, therefore, a specific rate cannot be applied, the standard cost per professional category for external personnel is used.

Two costs are available for each profile:

- **Standard cost for employees**
- **Standard cost for external resources**

3.4 Supplier Rates

When registering suppliers, a specific rate can be created for each one of the professional categories. This rate will be used when information is available on the supplier and category to be applied to each specific resource.

4 Communications

We can manage communications and define the events about which we want the system to send alerts and notifications automatically to users by email. Below are the main characteristics that can be defined insofar as communications are concerned.

4.1 Language

[CONFIGURATION > COMMUNICATION > Multi Language](#)

We can define which language to use from among those that each user can select as a preference for their environment.

[CONFIGURATION > COMMUNICATION > Settings](#)

The communications management system included in ITM Platform allows definition of the events about which we want users to receive automatic notifications and emails. The configuration options are as follows:

- **Default for new users:** Users will have a default configuration that defines when automatic alerts will be sent. Each user will be able to subsequently change this configuration in their personal profile.
- **Company email settings:** Users will receive an email telling them about the events defined in this option. Users will not be able to change these settings.

5 Project and Task Classification

Projects and tasks can be classified by a series of attributes. These attributes allow the activity related to tasks and projects to be classified, providing information on which types of activity efforts are being dedicated to.

Below are the main values for classifying projects and tasks, as well as the default values offered by the system. These can be customized to suit the needs of each organization.

5.1 Project Priority

[CONFIGURATION](#) > [PARAMETERS](#) > [Project Parameters](#) > [Project Priority](#)

The default priority for each project can be:

- High
- Low
- Normal
- Urgent

Unless indicated otherwise, projects will be registered with *Normal* priority. The organization can adjust these values to the classification used as standard.

5.2 Project Status

[CONFIGURATION](#) > [PARAMETERS](#) > [Project Parameters](#) > [Project Status](#)

Projects can have various statuses to identify each current situation. The default values are:

- Canceled
- Closed
- Draft
- In Progress
- Initial
- On Hold

The *Allow approvals* field establishes whether changing from certain project status to others requires approval from one or more team members.

Which status changes require approval, which conditions activate the need for approval, which team members must provide approval and whether approval is needed from one or more approval providers can be configured within each status.

The statuses of *Closed* and *Draft* cannot be deleted but their names can be changed and correspond to the situation of a complete or incomplete project.

All the other values can be changed and the organization can adapt this classification to the system it uses as standard to identify project status.

In addition, it is possible to configure how projects behave vis-à-vis the portfolio and timesheet based on project status.

5.3 Project Type

[CONFIGURATION](#) > [PARAMETERS](#) > [Project Parameters](#) > [Project Type](#)

Projects are classified by type; in other words, the nature of each one. The default values in the system are as follows:

- Adaptation of product or process
- Change Management
- Consulting
- New product or Business process
- Presales and Commercial management
- Research, Studies, Viability

Each organization can adapt these values to the project classification used as standard. Correct project type classification will enable a true image of the portfolio to be obtained, meaning full classification is recommended when classifying projects.

5.4 Project Approval

[CONFIGURATION](#) > [PARAMETERS](#) > [Project Parameters](#) > [Project Approval](#)

In order to enable the management of projects, even before being approved by the company, various predetermined levels are defined:

- Approved
- Cancel
- Pending
- Rejected

Each organization can define the project approval statuses and organize these values to suit its needs.

5.5 Project Task Priority

[CONFIGURATION](#) > [PARAMETERS](#) > [Task Parameters](#) > [Task Priority](#)

In addition to project priority, priorities can also be assigned to the tasks. This enables especially urgent tasks to be distinguished from others. The default values are:

- Urgent
- High
- Normal
- Low

Tasks are created with a default priority of *Normal*. Each organization can adapt these values to their needs and the classification used as standard.

5.6 Project Task Status

[CONFIGURATION](#) > [PARAMETERS](#) > [Project Parameters](#) > [Task Status](#)

Tasks are assigned a status and the default values are:

- To do
- In Progress
- To Verify
- Completed

The status of *Complete* cannot be deleted and indicates that a task is now closed. Although it cannot be deleted, it is possible to change its name and adapt it to the needs of your organization. The other values can be changed and this classification adapted to suit the system in place at your organization. Each task status will have an associated status type. The task status types are:

- To do
- In Progress
- Completed

The status types are taken into consideration when displaying the tasks assigned to each user in the personal panel.

5.7 Project Task Types

[CONFIGURATION](#) > [PARAMETERS](#) > [Task Parameters](#) > [Task Type](#)

Tasks are classified by type; in other words, the nature of each one. The following values have been defined by default:

- Management
- Design
- Technical
- Analysis
- With clients/users
- Generic
- Documentation

Each organization can adapt these default values to the task classification used as standard.

5.8 Custom Fields

[CONFIGURATION](#) > [OTHER SETTINGS](#) > [Custom Fields](#)

If the organization uses attributes related to projects or tasks that are not contained in the above parameters, custom fields can be included to show the corresponding information. These fields are defined according to the following parameters, among others:

- Field name (variable per language)
- Description
- Type (Date, DropDownList, HTML, List, Number, Percentage, RYGList, Text)
- Required Field (Y/N)

These fields will be displayed in the project, task, service, program or activity files to complement the information structure used by ITM Platform and thus adapt itself to the needs of your organization.

In addition to all these parameters, it is possible to configure and classify the services and activities by configuring their attributes in the same way as for projects and tasks.

6 Classification of Services and Activities

Services and activities can be classified by a series of attributes. These attributes allow the activity related to activities and services to be classified, providing information on which types of activity efforts are being dedicated to.

Below are the main values for classifying projects and tasks, as well as the default values offered by the system. These can be customized to suit the needs of each organization.

6.1 Service Priority

[CONFIGURATION > PARAMETERS > Service Parameters > Service Priority](#)

The default priority for each service can be:

- High
- Low
- Normal
- Urgent

Unless indicated otherwise, projects will be registered with *Normal* priority. The organization can adjust these values to the classification used as standard.

6.2 Service Status

[CONFIGURATION > PARAMETERS > Service Parameters > Service Status](#)

Services can have various statuses to identify each current situation. The default values are:

- Approved
- Cancelled
- Closed
- Draft
- In Progress
- Initial
- On Hold

The *Allow approvals* field establishes whether changing from certain service statuses to others requires approval from one or more team members.

Which status changes require approval, which conditions activate the need for approval, which team members must provide approval and whether approval is needed from one or more approval providers can be configured within each status.

6.3 Service Type

[CONFIGURATION > PARAMETERS > Service Parameters > Service Type](#)

Services are classified by type; in other words, the nature of each one. The default values in the system are as follows:

- Infrastructure Management
- Maintenance
- Others
- Provisioning
- Support

- Training

Each organization can adapt these values to the service classification used as standard.

6.4 Service Approval

[CONFIGURATION](#) > [PARAMETERS](#) > [Service Parameters](#) > [Service Approval](#)

In order to enable service management, even before being approved by the company, various predetermined levels are defined:

- Approve
- Cancel
- Pending
- Rejected

Each organization can define the service approval statuses and organize these values to suit its needs.

7 Program Classification

Just like projects and services, programs can be classified by a series of attributes. These attributes allow the activity related to other programs and projects to be classified, providing information on which types of activity efforts are being dedicated to.

7.1 Program Priority

[CONFIGURATION > PARAMETERS > Program Parameters > Program Priority](#)

The default priority for each program can be:

- High
- Low
- Medium

Unless indicated otherwise, projects will be registered with *Normal* priority. The organization can adjust these values to the classification used as standard.

7.2 Program Status

[CONFIGURATION > PARAMETERS > Program Parameters > Program Status](#)

Programs can have various statuses to identify each current situation. The default values are:

- Closed
- In Progress
- Initiation
- Pre-program
- Setup

7.3 Program Type

[CONFIGURATION > PARAMETERS > Program Parameters > Program Type](#)

Programs are classified by type; in other words, the nature of each one. The default values in the system are as follows:

- Business Change
- IT Change
- Maintenance

Each organization can adapt these values to the service classification used as standard.

8 Asset Classification

[CONFIGURATION > PARAMETERS > Asset Parameters > Asset Type](#)

Assets are classified by type; in other words, the nature of each one. The default values in the system are as follows:

- Application
- Information
- Infrastructure

Each organization can adapt these values to the service classification used as standard.

9 Purchase and Revenue Classification

9.1 Purchase Types

[CONFIGURATION](#) > [PARAMETERS](#) > [Purchase Parameters](#) > [Purchase Types](#)

Purchases are classified by type; in other words, the nature of each one. The default values in the system are as follows:

- Financial costs
- Goods
- Indirect costs
- Services

Each organization can adapt these values to the classification used as standard.

9.2 Purchase Status

[CONFIGURATION](#) > [PARAMETERS](#) > [Purchase Parameters](#) > [Purchase Status](#)

Purchases can have various statuses to identify each current situation. The default values are:

- Cancelled
- Order placed
- Order received
- Paid
- Planned

9.3 Revenue Status

[CONFIGURATION](#) > [PARAMETERS](#) > [Revenue Parameters](#) > [Revenue Status](#)

Revenues can have various statuses to identify each current situation. The default values are:

- Billed
- Cancelled
- Cashed
- Planned
- Refused

10 Risk Classification

ITM Platform allows project risks to be identified and managed, in the understanding that a risk is any possible events that could negatively affect the project should it arise. Risk management is divided into initial identification and classification, and the preparation of mitigation plans (or likelihood reduction) and contingency plans (impact reduction).

Each company can adjust the risk classification according to the values it is most accustomed to using or it deems most suitable to its needs. Below is a description of each risk classification value, its relationship to the others and the default values offered by ITM Platform.

10.1 Impact

[CONFIGURATION > PARAMETERS > Risk Parameters > Risk Level](#)

Impact measures the effect that the materialization of a risk will have on the project; in other words, how what we fear might happen would affect the project. The highest level will indicate that the impact on the project is maximum; in other words, it jeopardizes its completion. The values used in the application are:

- High 10
- Medium-high 7
- Medium-low 5
- Low 1

The company can increase or reduce these values, change the descriptive text and adjust the numeric value used for calculating risk exposure, which is explained below.

10.2 Likelihood

[CONFIGURATION > PARAMETERS > Risk Parameters > Risk Level](#)

This is where we identify the likelihood that we estimate exists for the risk to arise; in other words, the probability of what we fear actually happening.

- High 4
- Medium-high 3
- Medium-low 2
- Low 1

The company can increase or reduce these values, change the descriptive text and adjust the numeric value used for calculating risk exposure, which is explained below.

10.3 Level of Exposure

[CONFIGURATION > PARAMETERS > Risk Parameters > Risk Level](#)

The level of exposure is calculated by multiplying the impact value by the likelihood value (impact x likelihood). Once this calculation is performed, we can classify risks according to exposure levels. Those with the highest likelihood and impact are considered as those to which we have the highest exposure and, therefore, those regarding which the fastest action should be taken. The default values are:

- High >21
- Medium >11
- Low >0

The company can change the text that identifies each of these levels and the numeric value used to calculate them. For example, if the company sets impact values from 1 to 10 and likelihood levels from 1 to 100, the risk exposure levels should range from 1 (1 x 1) to 1,000 (10 x 100).

10.4 Risk Status

[CONFIGURATION > PARAMETERS > Risk Parameters > Risk Status](#)

Risks can be classified by status. In this regard, the application considered the following values by default:

- Resolved *
- Not analyzed *
- Analyzed *

The status of *Not Analyzed* cannot be deleted and corresponds to the risks we have not examined and for which no likelihood or impact have been identified, meaning we are unable to calculate a risk exposure level.

The company can adjust these values to its standard criteria in order to classify the status of project risk management.

10.5 Risk Types

[CONFIGURATION > PARAMETERS > Risk Parameters > Risk Type](#)

By default, risks are classified into the following categories:

- Technical
- Scope
- Team
- Organizational

Each company can adjust these values according to its experience and criteria. The correct identification of risk types will enable us to analyze which problems we are encountering in projects and enable global action to be taken in their regard.

11 Follow-up Values

[CONFIGURATION > PARAMETERS > Follow-up Parameters](#)

ITM Platform enables the follow-up of Projects, Tasks and Activities. These follow-up processes are given a generic identifier about their status. By default, these are the values used:

- Good
- Not critical
- Critical

Each company can adjust the texts of these values with the descriptions used as standard within its organization to identify the status of projects, tasks and services to be described in the follow-up.

12 External Supplier and Client Registration

12.1 Suppliers

[ORGANIZATION](#) > [COSTING](#) > [Suppliers](#)

If external personnel provide services at the company, it is recommended to register the suppliers that employee these people before registering users because it will enable the user to be assigned directly to the supplier.

Similarly, to assign invoices to any type of supplier (services, hardware, consultancy, licenses, etc.), the supplier will first need to be registered.

Basic Details

The details for registering a supplier are:

- Name and code
 - * Supplier name
 - Supplier code
- Address
 - Address
 - City
 - State
 - Country
 - Telephone number
 - Zip code
 - Fax
 - * Email address
 - Website
- Financial Information
 - * Particular payment period
 - Tax (%)

Rates

[ORGANIZATION](#) > [COSTING](#) > [Providers](#) > [\[Selected supplier\]](#) > [Rates](#)

For each one of the professional categories defined by the organization (see section 2.6), one rate per provider can be registered (see section 3 Standard Costs and Rates). When we register users and we indicate the provider to which they belong and their professional category, we will be able to know their rate and use that when calculating estimates and the cost of work carried out.

12.2 External Clients

[MANAGEMENT](#) > [Clients](#)

The following information is required to register external clients in the system:

- Client details
 - * Client name
- Client address
 - Address
 - City
 - Post code
 - State
 - * Email address
 - Website
 - Telephone number
 - Fax
- Contact details
 - Contact name
 - E-mail address
 - Mobile number
 - Telephone number
 - Fax

13 User Registration

13.1 Personal Details

[ORGANIZATION](#) > [USER MANAGEMENT](#) > [Users](#)

You will need at least the following information to register a new user on ITM Platform:

- * **Username:** email address of the user, it must be unique in the system
- * **Password:** access password to the system
- * **Display name:** Full name of the user as it will be shown in the system. This field is sometimes used to avoid displaying the name of the external personnel, replacing it with such descriptions as *Programmer 1*.
- * **First name:** First name of the user.
- * **Last name:** Last name of the user.
- * **Default language:** The language in which ITM Platform will be displayed for this user.
- **Standard Working Hours:** the type of timetable for this user.

This is the essential information for registering a user but other user details can also be added.

13.2 Position

[ORGANIZATION](#) > [USER MANAGEMENT](#) > [Users](#) > [\[Selected user\]](#) > [Position](#)

Each user has a defined position. This position should not be confused with the professional category. A professional category indicates a *level* or generic function. A position is the combination of a functional category in a specific department.

To indicate the position of each user, the following information must be provided:

- **Employee / Supplier:** state whether the user is an employee or an external member of staff providing a service.
- * **Professional category:** the professional category of the user.
- * **Position:** name of the position.
- * **Department:** place within the organizational structure where the position exists.
- **Currently working:** if this box is ticked, you do not need to state the date they left this position as this indicates that the user is currently working in this position.
- * **Since:** date since when the user has been working in this position.
- * **Until:** date until the user was working in this position.
- **Description:** description of the position.

13.3 Roles

[ORGANIZATION](#) > [USER MANAGEMENT](#) > [Users](#) > [\[Selected user\]](#) > [Personal](#)

Even though user roles in ITM Platform are entirely customizable, the system includes a series of default roles. Each user must be assigned to one or more roles:

- **Team Member**
- **Project and Service Manager**
- **Project Guest**
- **Full Access**

By default, users are created with the roles marked for this purpose. This means it is recommended to configure ITM Platform so it is applied when registering the user.

13.4 Calendar

[ORGANIZATION](#) > [USER MANAGEMENT](#) > [Users](#) > [\[Selected user\]](#) > [Calendar](#)

Each user will be assigned the calendars that include which days are non-working days, in order to enable effort estimates to be carried out. By default, users will be assigned the standard calendar of the organization and their own personal calendar that only includes the non-working days for that person. Other calendars can also be assigned to each user.



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