



ITM Platform  
PROJECTS • PROGRAMS • PORTFOLIO

Transform your  
company into a  
competitive machine

Cloud-Based  
**Project Portfolio  
Management**





# ITM Platform

PROJECTS • PROGRAMS • PORTFOLIO

**ITM Platform** is the project portfolio management solution for growing businesses.

It's comprehensive, intuitive, and gets your Project Management Office up and running in 2 weeks.





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## Information & Communication

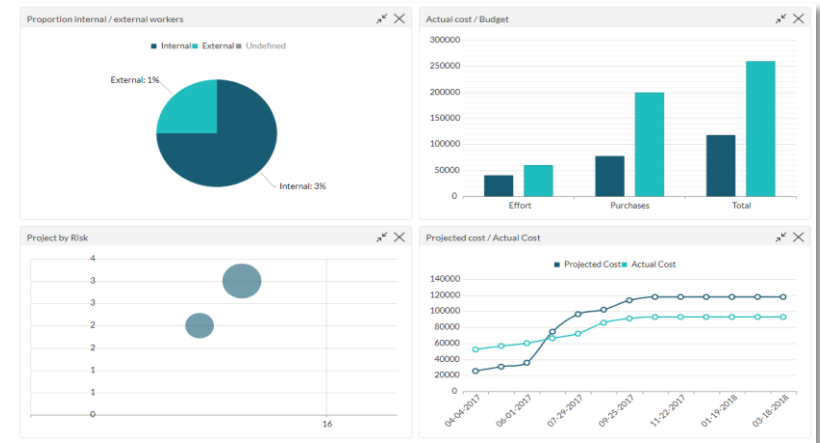
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## Costs and Revenue

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

Add Required 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	
	8:00h	0:00h	8:00h	6:30h	0:00h	

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 function	Travis Crellana	David Martin	Major Wyman	David Simon
Projection initial stage		Team Member		
The idea of the product description		Project Manager		
Gather the information required for the ...		Team Member		
Development stage		Guest		
Allocate resources for development stage				
Market evaluation				
Gather market information				
Identify and contact customer sample				
Analysis of competitors				
Redefine product requirements				
Pilot stage				

### ☆ 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

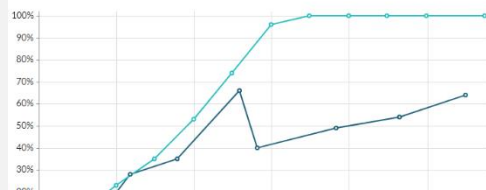
view previous progress reports

Assessment: Good

% Completed: 64%

% Expected today: 73%

% 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

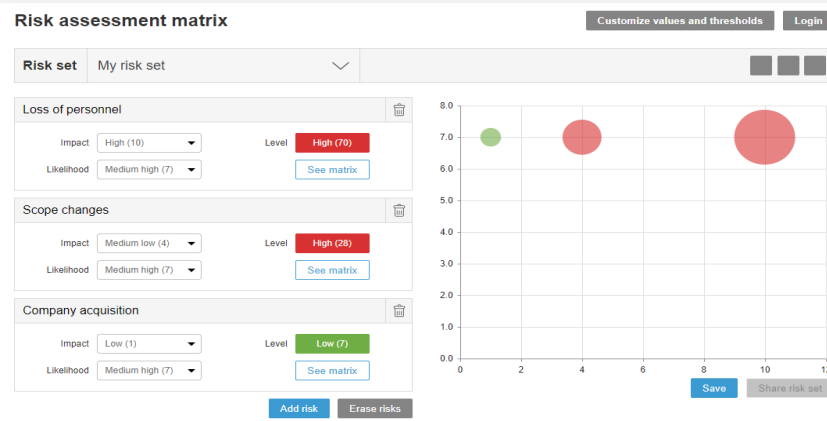
Filter

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 Management

Better safe than sorry. Record project risks,  
evaluate them and document your plans.

Risk classification  
Customizable exposure level calculation  
Assignment of managers  
Mitigation and contingency plans  
Documentation



## 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

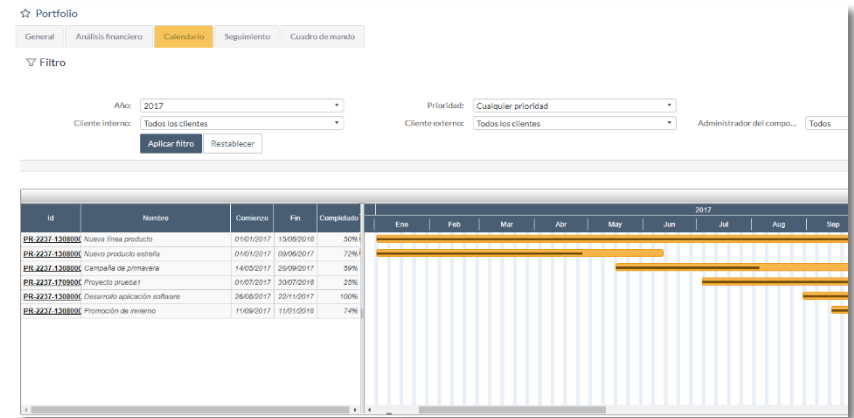
Individualized milestone monitoring

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.

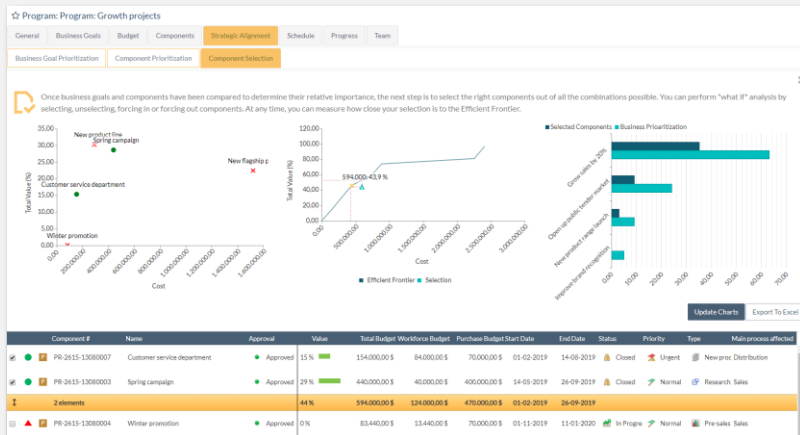
Component selection (projects and services)

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.

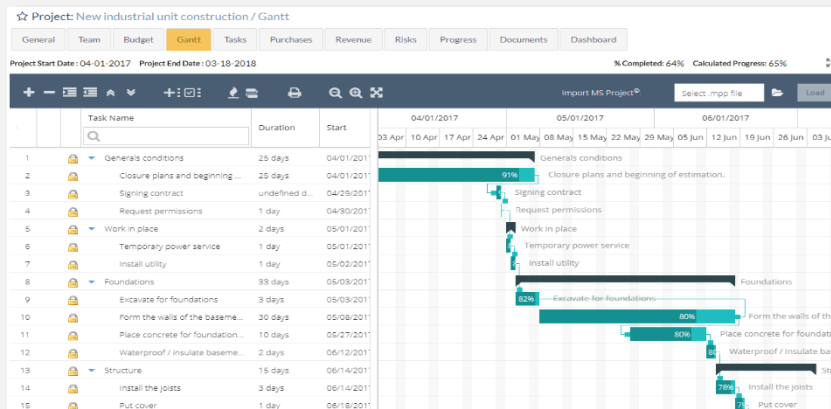
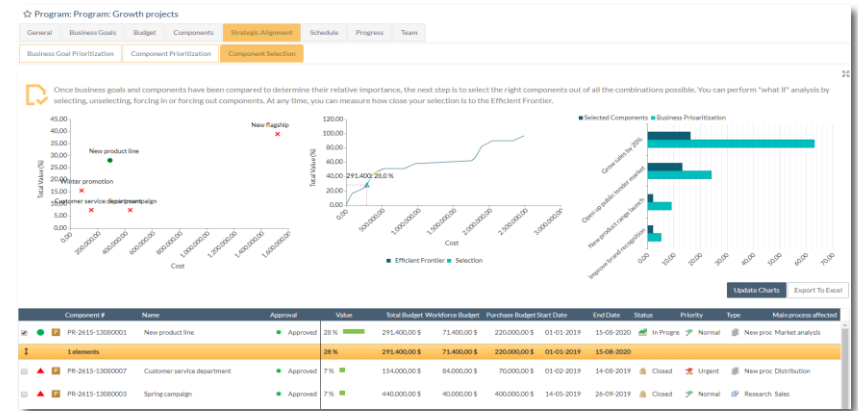
Pre-project and Idea Management

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 Ita...

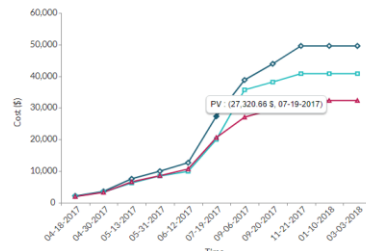
Projects & Services				06-29-2017			06-30-2017			07-01-2017			07-02-2017		
100%				Demand	Allocated	Gap	Demand	Allocated	Gap	Demand	Allocated	Gap	Demand	Allocated	Gap
TOTAL DEMAND: 264:56H				TOTAL ALLOCATED: 264:56H			TOTAL GAP: 0:00H								
				100%			100%			0%			0%		
▶ New product line				52:32	52:32	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					40:11			2:41			0:00			0:00	
▶ Analysis of pilot stage					40:00			2:30			0:00			0:00	

### Earned Value

The Earned Value metrics provide indicators to measure project progress by analyzing variations in cost and scheduling, ascertaining whether costs and deadlines deviate.

Values at 03-03-2018		Hours	Cost
Budgeted Cost of Work Completed (BCWC)	BAC	1144:00	49,668.00 \$
Budgeted Cost of Work Scheduled (BCWS)	PV	1144:00	49,667.99 \$
Actual Cost of Work Performed (ACWP)	AC	866:00	40,790.00 \$
Budgeted Cost of Work Performed (BCWP)	EV	738:13	32,377.84 \$
Cost Variance (CV)	CV	-127:47	-8,412.16 \$
Schedule Variance (SV)	SV	-405:47	-17,290.16 \$
Cost Performance Index (CPI)	CPI		0.79
Program Performance Index (PPI)	PPI		0.65



The project value projections indicate how the main budget variables will be affected by considering three different scenarios.

Prediction: Continuity Scenario		Hours	Cost
Budgeted Cost on Conclusion (BCC)	BCC ⓘ	1144:00	49,668.00 \$
Cost Performance Index (CPI)	CPI ⓘ		0.79

The "continuity" scenario assumes that there will be no variations in performance and performs a cost and deadline estimate based on the current situation.

## 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

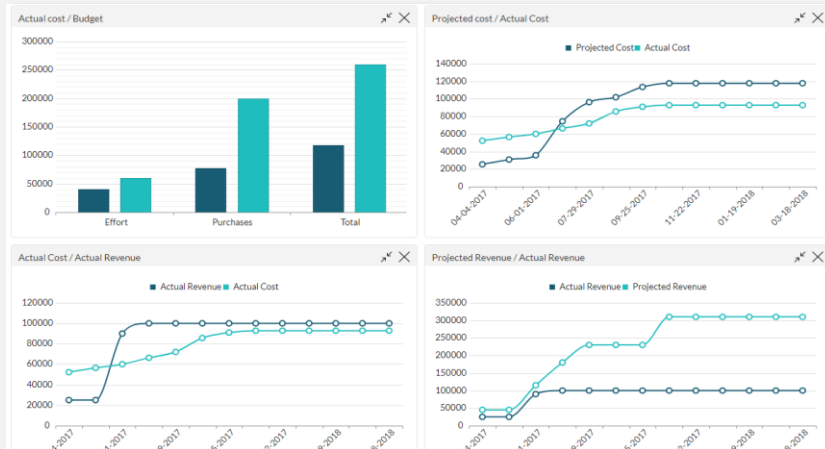


## Cost and Revenue Management

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
Internal Team:	700:00 h	29,400.00 \$ (USD)	462:00 h	27,844.00 \$ (USD)	452:15 h
External Team:	800:00 h	30,400.00 \$ (USD)	682:00 h	21,824.00 \$ (USD)	413:45 h
Undefined Team:	00:00 h	0.00 \$ (USD)	00:00 h	0.00 \$ (USD)	0:00 h
Total Workforce:	1500:00 h	59,800.00 \$ (USD)	1144:00 h	49,668.00 \$ (USD)	865:00 h
Purchases Budget:		200,000.00 \$ (USD)		197,500.00 \$ (USD)	
▲ Total Cost:		259,800.00 \$ (USD)		247,168.00 \$ (USD)	
Total Revenue:		320,000.00 \$ (USD)		310,000.00 \$ (USD)	
Margin:		60,200.00 \$ (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



## Customers Management

Confidence built with reliable information.

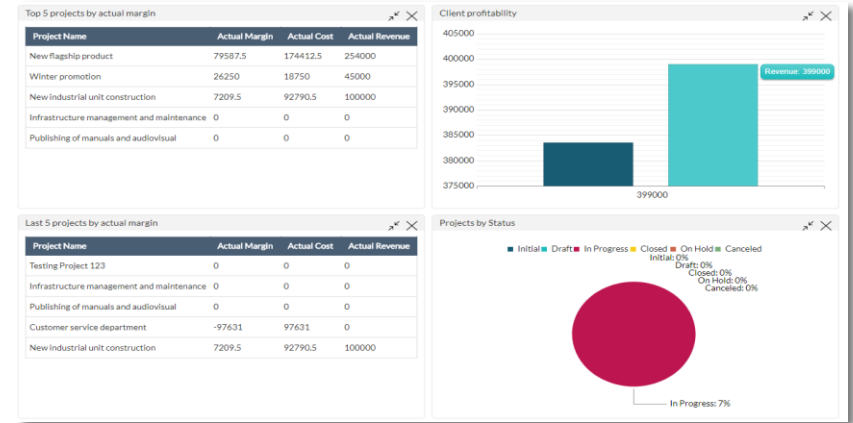
Customer data administration: file, contact details

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

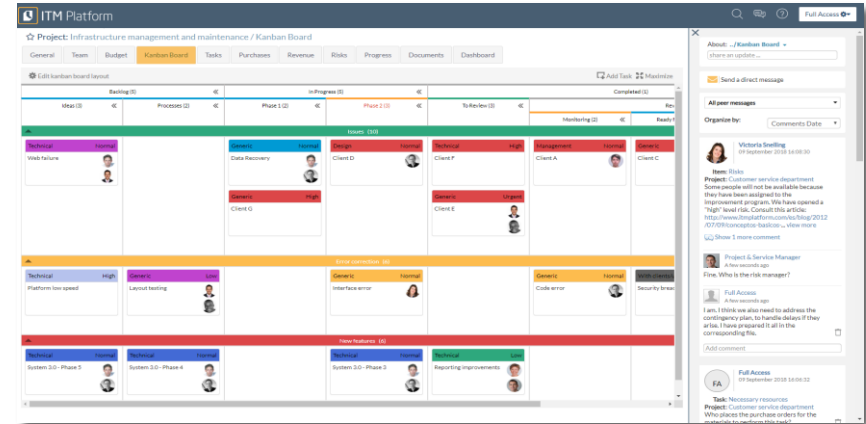


## Integrated Social Network

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

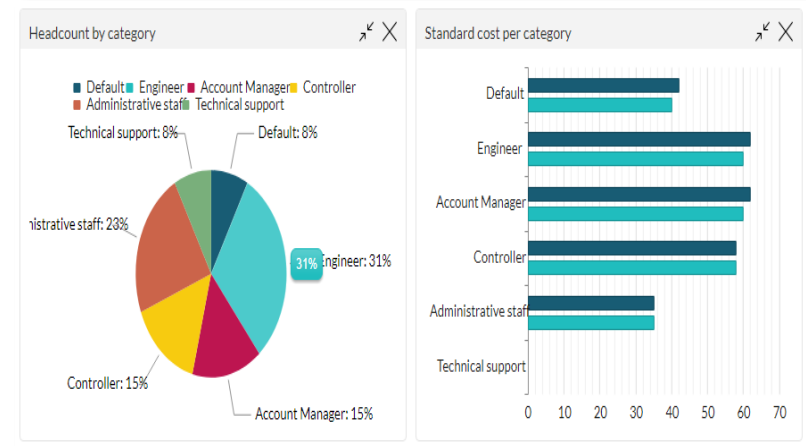
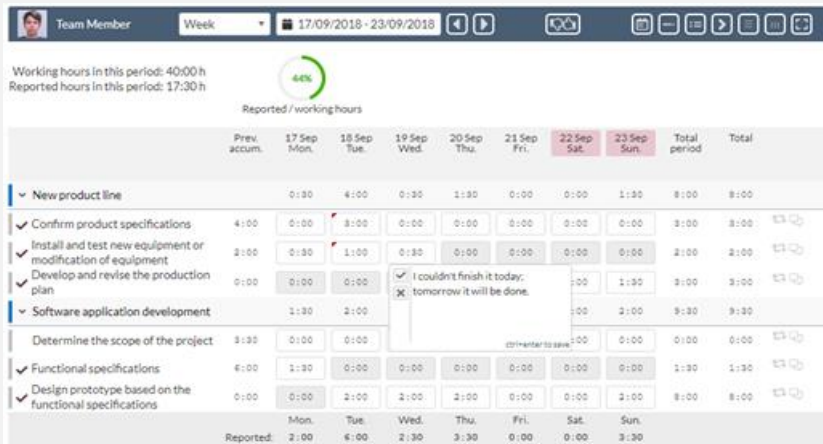
Visualize all project information.

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: [Avatar] Week: 17/09/2018 - 23/09/2018

Working hours in this period: 40:00 h  
Reported hours in this period: 17:30 h  
Reported / working hours: 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						2:00	9:30	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	0:00	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	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

☆ Custom Fields

Entity: Projects

\* Language: English

Enable on all entity types: All

\* Field Name: Area

Field Description: Area of influence for this project

Remaining Chars: 1966

\* Field type: DropDownList

Required Field: ☐

Display: ☒

\* Items:

- North
- South
- East
- West
- Coast

Add Up Down Default Remove

### Edit Top-Down Budget

	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	€ (EUR)
Total Workforce:	1,500.00 h		59,800.00	\$ (USD)
Purchases Budget:			200,000.00	\$ (USD)
Total Cost:			259,800.00	\$ (USD)
Total Revenue:			320,000.00	\$ (USD)
Margin:			60,200.00	\$ (USD)

Save

Cancel

## 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: [X] Is equal to: [X] Approved [X] Pending [X] Rejected [X] Apply now Remove

AND

End Date: [X] Between: [X] 28/09/2014 [X] 28/09/2016 [X] Apply now Remove

+ Add filter

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

## 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

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### **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

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Oil & Gas



Fintech



Logistics



Engineering



EHC GLOBAL



## Some of our clients

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### Financial Services



### Health



### Food Industry



### Publishing



### Fashion



### Education



### Quality



### Manufacturing







## Our customers' voices

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*"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

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*"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)