



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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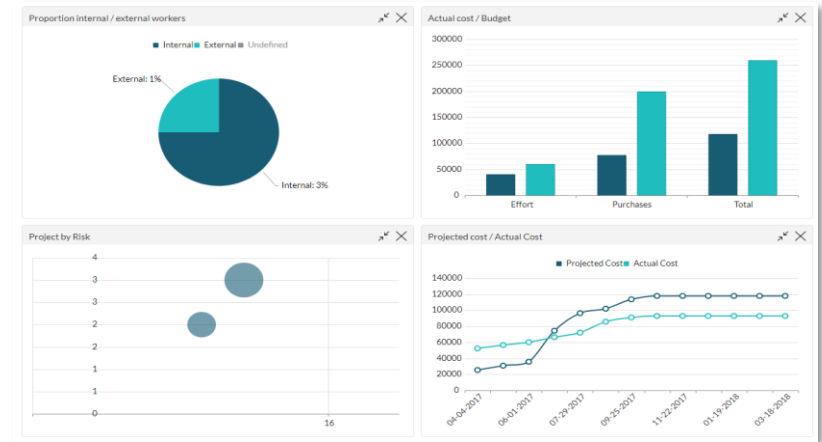
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Costs and Revenue

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

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	
Total	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

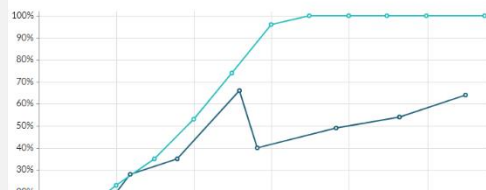
view previous progress reports

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

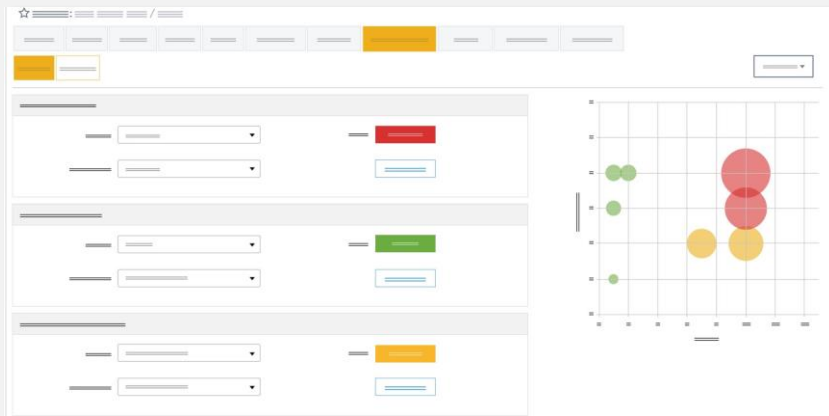
★ Project: New industrial unit construction / Documents

General Team Budget Gantt Tasks Purchases Revenue Risks Progress Documents Dashboard

Filter

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

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



Risk & Issue Management

Register and manage risks. Control all issues.

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



Portfolio Management

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

Combined view of projects, programs and services

Financial analysis of costs and revenue

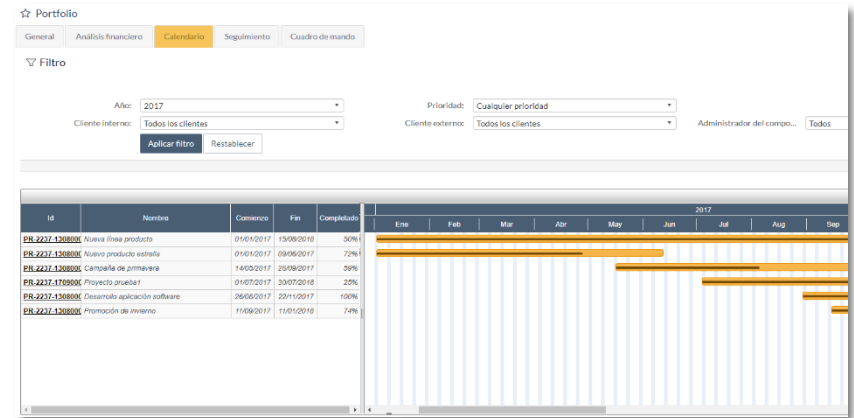
Individualized milestone monitoring

Project schedule and progress status

Portfolio dashboard

Create dependency between projects, services and programs

Critical road



Program Management

Do you want to have a greater impact?

Gather your projects in programs with common objectives.

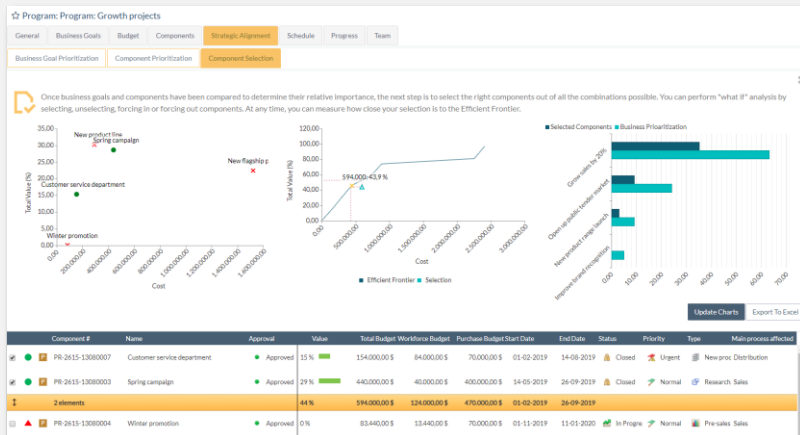
Component selection (projects and services)

Program budget, estimated and real analysis of each component

Schedule, follow-up and management team

Alignment of objectives and projects

Relative value of projects



Organization by Objectives

Your projects and your business must go hand in hand.

Objective and criteria prioritization

Project evaluation

External scenarios versus project sets

Approval and monitoring of selected projects

☆ Program: Program: Growth projects

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

Business Goal Prioritization Component Prioritization Component Selection

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

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

Consistency Ratio: 0.5859

	Open up public tender market	Grow sales by 20%	New product range launch	Improve brand recognition
Open up public tender market	1	0	3	5
Grow sales by 20%	1/0	1	0	3
New product range launch	1/3	1/0	1	1/0
Improve brand recognition	1/5	1/3	0	1

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

☆ Service List

Filter

Name Approval Status

Manager Team Guest

Apply Reset

view more options

Add New Service Export

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

Service Management

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

Project teams, documentation, monitoring

Timesheets

Integrated resource management

Social communication between members of the service

Activity control

Strategic Planning

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

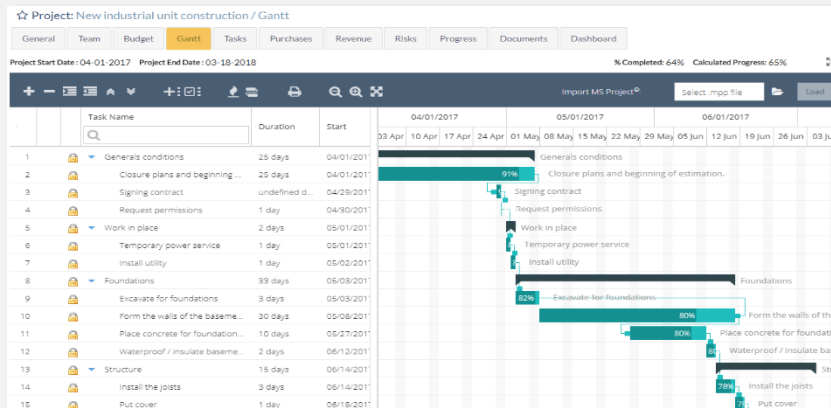
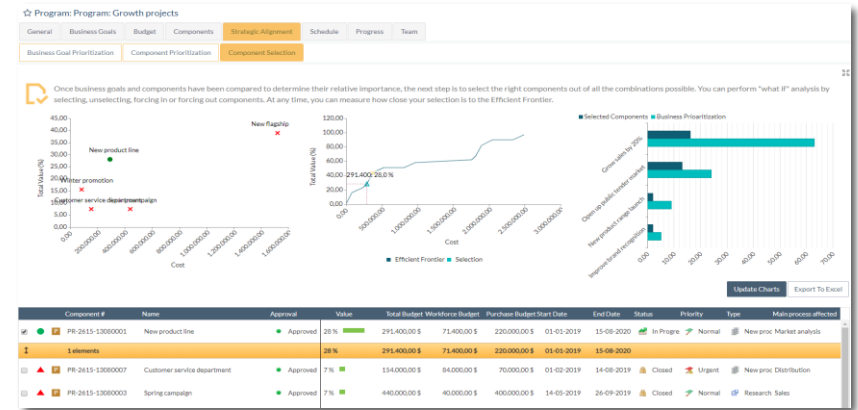
Pre-project and Idea Management

Resource categorization

"What if?" scenarios for planning

Alignment with strategic objectives

General and detailed budget



Project Planning

All planning tools to define projects to the last detail.

Pre-implementation project status information

Project templates for new projects

Advanced Gantt chart planner

Allocation of resources and professional profiles

Continuous planning based on predicted scenarios

Resource Planning

A unified view to balance demand and capacity.

Resource and overstaffing dashboard

Assign of individuals or professional profiles to tasks

Load and productivity analysis

Employee distinctions and external resources

Resource analysis based on effort

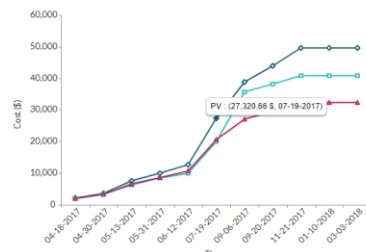
Resources

Planning		Analysis	
Interval:	Day	Number:	7
Start:	06-29-2017	Apply	Underalloca... 0
Projects & Services		06-29-2017	
100%		Demand	Allocated
TOTAL DEMAND		264:56H	264:56H
TOTAL ALLOCATED		0:00H	0:00H
TOTAL GAP		0:00H	0:00H
06-30-2017		Demand	Allocated
07-01-2017		Demand	Allocated
07-02-2017		Demand	Allocated
New product line		52:32	52:32
Spring campaign		4:24	4:24
New industrial unit construction		0:00	0:00
Customer service department		3:16	3:16
Professional categories/Users		06-29-2017	
Engineer (Internal)		Capacity	Availability
David Martin		32:00	46:29
Production Manager		8:00	40:11
New product line		40:11	2:41
Analysis of pilot stage		40:00	2:30

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
Budgeted Cost of Work Scheduled (BCWS)	PV	49,667.99 \$
Actual Cost of Work Performed (ACWP)	AC	866:00
Budgeted Cost of Work Performed (BCWP)	EV	738:13
Cost Variance (CV)	CV	-127:47
Schedule Variance (SV)	SV	-405:47
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
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

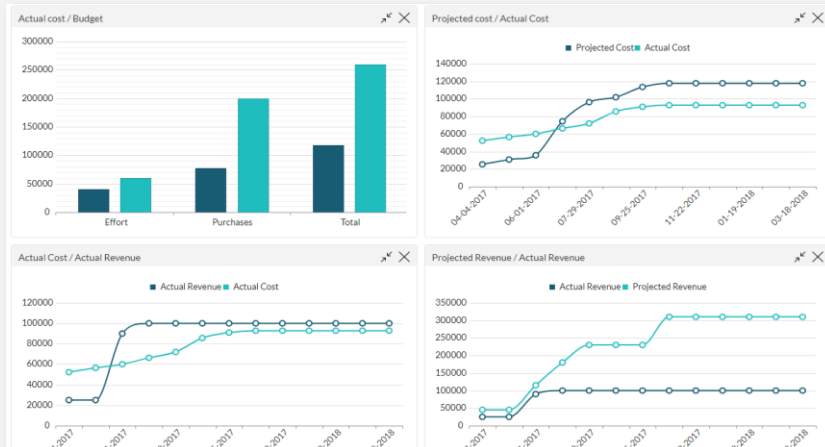


Cost and Revenue Management

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.

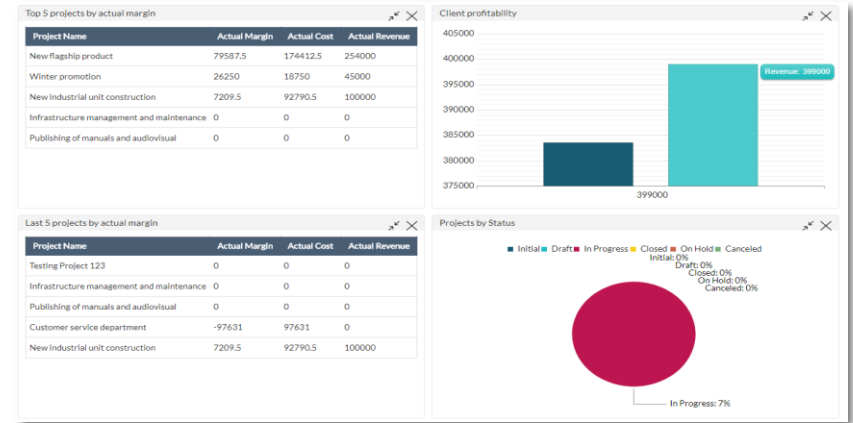
Customer data administration: file, contact details

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

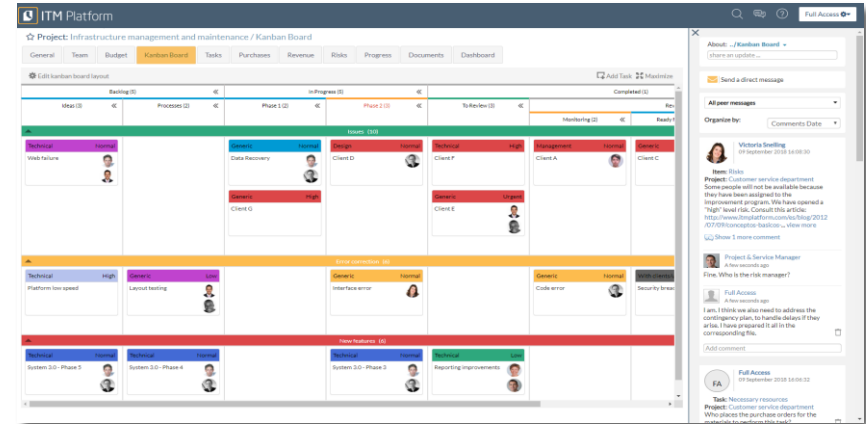


Integrated Social Network

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

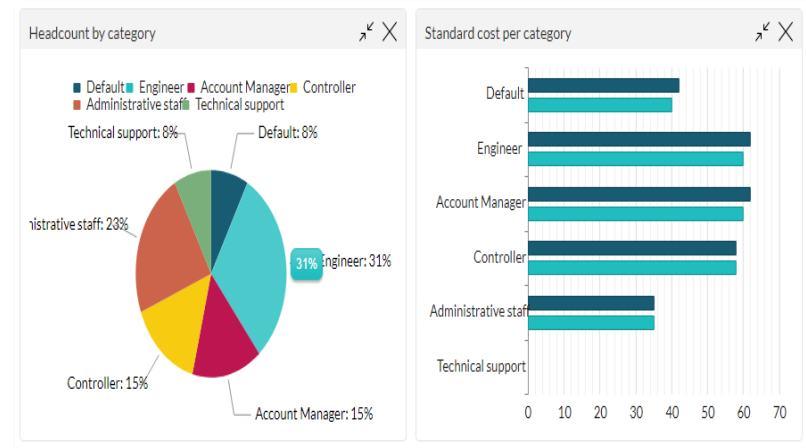
Visualize all project information.

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	3:00
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	1:30
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

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:

AND

End Date:

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



Every kind of organization

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



Software as a service

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



Security and Confidentiality

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



Affordable and no commitment

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



Scalable

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

Some of our clients

Oil & Gas



Fintech



Logistics



Engineering



EHC GLOBAL

Some of our clients

Financial Services



Health



Food Industry



Publishing



Fashion



Education



Quality



Manufacturing





Our customers' voices



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

Alberto Miguel Benito

Head of Project Management

On The Spot Services - Grupo Telefónica



Our clients' voices



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

Anael Ndosa
Chairman, PMI

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

Ainhua Tolentino
CEO, Onyriq





www.itmplatform.com