

[illegible]



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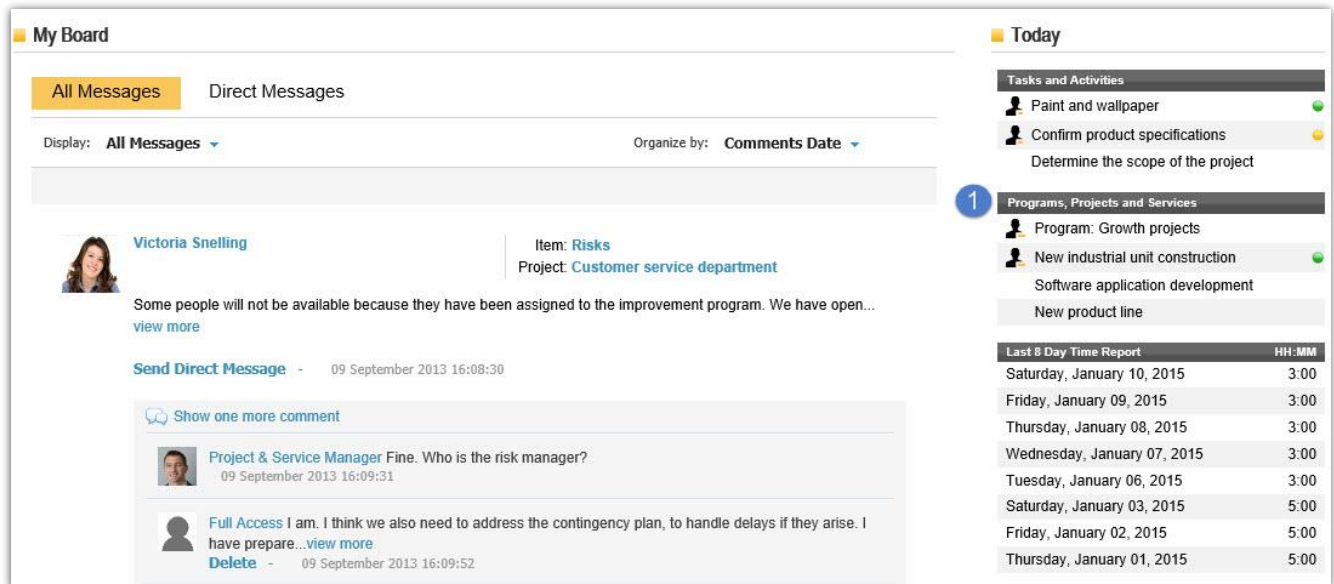
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# 1. The Project Manager

In ITM Platform, the Project Manager is the one person with permissions to change or view every aspect of a project: distribution of tasks, economic scope, communication, documentation, etc.

A Project Manager can be appointed when first creating a project, who will be duly informed of this via their Communication Panel and email according to how they have their system configured.

Whenever the  icon is displayed to the left of a project name , it means you are the Project Manager and can view all the corresponding sections by clicking on the icon.



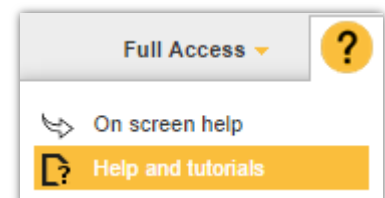
| Last 8 Day Time Report      |       |
|-----------------------------|-------|
|                             | HH:MM |
| Saturday, January 10, 2015  | 3:00  |
| Friday, January 09, 2015    | 3:00  |
| Thursday, January 08, 2015  | 3:00  |
| Wednesday, January 07, 2015 | 3:00  |
| Tuesday, January 06, 2015   | 3:00  |
| Saturday, January 03, 2015  | 5:00  |
| Friday, January 02, 2015    | 5:00  |
| Thursday, January 01, 2015  | 5:00  |

Bear in mind that there may be more than one Project Manager and that you, as a Project Manager, can assign others provided the persons you wish to appoint have a licence permitting them to take on such a role.

Browsing a project file is done via tabs, which represent the various sections described in this guide.



If you require any additional information, you will find guides and video tutorials by accessing the “Help and Tutorials” option from the help button. Additional information can also be found via the ITM Platform channel on YouTube at <http://www.youtube.com/user/itmplatform>.



## 2. Home Panel

The Home Panel offers a general overview to all members of a project, although its content is adapted according to the permissions of whoever is viewing the information. The Project Manager will see the entire panel: the General Information section ①, the Communication Panel with all the messages and conversations related to the project in question ② and the “Today” Panel ③, which, unlike the “Today” section on the “Home” Panel, shows all those items that are active and relevant today in terms of the project and not the user connected and viewing the system.

Project: New industrial unit construction

Project Home General Team Budget Schedule Tasks Purchases Risks Follow-up Docs Dashboard

### General

Project Name: New industrial unit construction  
Project No: PR-1147-13080006  
Department Responsible: Project Office  
Project Status: In Progress  
Approval: Approved  
Project Type: Construction  
Priority: High  
Description: Description of the project

Project Start Date: 4/1/2014  
Project End Date: 3/18/2015

### Project Team Board

Display: All Messages Organize by: Comments Date

Travis Orellana  
Item: Risks  
Project: New industrial unit construction  
Some people will not be available because they have been assigned to the improvement program. We have open... view more  
Delete - 09 September 2013 15:59:39  
Show one more comment  
Team Member Fine. Who is the risk manager?  
Delete - 09 September 2013 16:00:20  
Full Access I am. I think we also need to address the contingency plan, to handle delays if they arise. I have prepare...view more  
Delete - 09 September 2013 16:00:29  
Add comment

Marga Simon  
Task: Form the walls of the basement  
Project: New industrial unit construction  
Who places the purchase orders for the materials to perform this task?  
Delete - 09 September 2013 15:58:10  
Show one more comment  
Travis Orellana Accounts keeps track of all the purchases made and has an access role allowing them to do this.  
Delete - 09 September 2013 15:58:51  
Team Member Okay. I will deal with updating the project budget to include all purchases  
Delete - 09 September 2013 15:59:52  
Add comment

### Today

Tasks  
Installing finishes

Risks  
Resistance to change  
Invalid suppositions  
Budgetary cutbacks  
Loss of key personnel

Follow-Ups  
Automatic follow-up  
Automatic follow-up  
Automatic follow-up  
Automatic follow-up  
Automatic follow-up  
Automatic follow-up  
Automatic follow-up  
Automatic follow-up  
Automatic follow-up  
Automatic follow-up

Last 8 Day Time Report  
Saturday, October 11, 2014 1:00  
Friday, October 10, 2014 1:00  
Thursday, October 09, 2014 1:00  
Wednesday, October 08, 2014 1:00  
Tuesday, October 07, 2014 1:00  
Saturday, October 04, 2014 1:00  
Friday, October 03, 2014 1:00  
Thursday, October 02, 2014 1:00  
View more...  
Current Month 17:30

### 3. General Parameters of the Project

Inicio Proyecto   **General**   Equipo   Presupuesto   Gantt   Tareas   Compras   Riesgos   Seguimiento   Documentos   Cuadro de mando

The “General” tab contains the project classification data. Bear in mind that the more information you feed into this section, the better you will be able to subsequently analyse aspects related to this project and the portfolio as a whole.

General

Project ID: PR-1147-13080006   Company Project Code: CO 99857 / 13

\* Project Name: New industrial unit construction

Performing Unit: Project Office

Approval Status: Approved   \* Project Status: In Progress

\* Priority: High   \* Project Type: Construction

Description:   
 Use this section to share the general purpose of the project with the project members.   
 The "General" section can be used to identify, classify, and may include customized fields corresponding to the project.   
 How to create projects swiftly

The parameters included here are highly customisable. For example, those related to approvals, priority, status or project type will be those applied to your organisation.

Besides the General sub-section, you will also find:

- Project start and end **dates** (not compulsory).
- Alignment with **targets**, where you can set the individual significance of the project for the organisation.
- **Relationships**, where you can link the project to Processes, Clients and various departments within your organisation.

Besides the standard information fields, this section will also display customised fields to suit the information requirements of your organisation if the Administrator has configured it to do so.

Custom fields

Level of exposure: ☒ High ☐ Medium ☐ Low

ERP Code: 65.885

Customer acceptance date: 8/24/2013

Geographical area: East

\* Billed Invoice: No

## 4. Allocating Users to Projects and Tasks

### Allocating Users to Projects

Once users have been set up, they can be allocated to projects and tasks. Click on “Projects” **1** and select a project to which you wish to allocate a team **2**. Click on “Add Users” **3** to add users.

The screenshot shows the ITM Platform interface. The left sidebar has a 'Projects' link highlighted with a blue circle 1. The main area displays the 'Team' tab for a project, with a blue circle 2 on the 'Team' tab. The 'Team' tab shows a list of tasks with columns for team members. A blue circle 3 is on the 'add people' button.

You must then assign a role to each user in the project by selecting from the list of available roles **4**: **Project Manager** for creating tasks, allocating other users in the team to those tasks and administering the various project variables; **Team Member** of the project for actively taking part in the project; or **Interested Party** for accessing project information as read-only data.

The screenshot shows the ITM Platform interface. The 'Team' tab is selected. The 'add people' button is clicked, and a dropdown menu is shown with roles: Team Member, Project Manager, Team Member, Guest, and delete. A blue circle 4 is on the 'Guest' role.



## Allocating Users to Tasks

Once the roles have been assigned to each user in the project, you can also assign their roles in the specific tasks if they have already been created from the “Gantt Chart” or “Tasks” sections.

Click on each task icon beneath a user **1** to appoint that user as **Task Manager** or **Task Member**.

| tasks                                      | Full Access | Marga Simon | Travis Orellana | David Simon |
|--------------------------------------------|-------------|-------------|-----------------|-------------|
| <b>Generals conditions</b>                 |             |             |                 |             |
| Closure plans and beginning of estimati... |             |             |                 |             |
| Signing contract                           |             |             |                 |             |
| <b>Work in place</b>                       |             |             |                 |             |
| Temporary power service                    |             |             |                 |             |
| Install utility                            |             |             |                 |             |
| <b>Foundations</b>                         |             |             |                 |             |
| Excavate for foundations                   |             |             |                 |             |

Bear in mind that any user with *Team Member* permissions can be appointed as the **Task Manager** and perform the duties related to managing the task, such as supervision, uploading documentation or estimating effort.

## Other Team Sub-sections

This same section can be used to change the display and access different information on each user and their tasks.

| tasks                                      | Full Access | Marga Simon |
|--------------------------------------------|-------------|-------------|
| <b>Generals conditions</b>                 |             |             |
| Closure plans and beginning of estimati... | 50:00       | 30:00       |
| Signing contract                           |             | 4:00        |
| <b>Work in place</b>                       |             |             |
| Temporary power service                    |             | 4:00        |
| Install utility                            | 4:00        | 3:15        |

| tasks                                      | Full Access    | Marga Simon    |
|--------------------------------------------|----------------|----------------|
| <b>Generals conditions</b>                 |                |                |
| Closure plans and beginning of estimati... | 50:00<br>28:00 | 39:00<br>28:00 |
| Signing contract                           |                | 4:00<br>3:30   |
| <b>Work in place</b>                       |                |                |
| Temporary power service                    |                | 4:00<br>3:15   |
| Install utility                            | 4:00<br>3:15   | 3:15           |

The “**Estimated Effort**” sub-section **1** will enable you to make workload predictions **2** in order to adjust the size of the team, manage capabilities and estimate budget costs.

Clicking again will bring up the “**Accepted Effort**” sub-section **3**, where you will be able to see the estimated / reported values and change the accepted value **4** for the task as a whole.

## 5. Budget

The **cost elements** administered within ITM Platform projects are those of **hours** and external **procurement** or acquisitions (invoices). In the simplest of terms, let's say that a project consumes "n" hours at a cost of "x" and that it also consumes external resources, such as materials for example, for a total value of "z". In this case, consumption by the project will amount to n hours \* x dollars + z material costs.

There are three **main blocks** related to budgets and supervision handled by ITM Platform:

| Project Home General Team <b>Budget</b> Schedule Tasks Purchases Risks Follow-up Docs Dashboard |  |                 |                     |                          |                     |               |                     |                              |                     |
|-------------------------------------------------------------------------------------------------|--|-----------------|---------------------|--------------------------|---------------------|---------------|---------------------|------------------------------|---------------------|
| Budget                                                                                          |  |                 |                     |                          |                     |               |                     |                              |                     |
|                                                                                                 |  | 1               |                     | 2                        |                     | 3             |                     |                              |                     |
|                                                                                                 |  | Top Down Budget |                     | Bottom-up Estimated Cost |                     | Actual Values |                     | Last Period End Close Values |                     |
|                                                                                                 |  | Hours           | Cost                | Hours                    | Cost                | Hours         | Cost                | Hours                        | Cost                |
| Internal Team:                                                                                  |  | 700 h           | 29,400.00 \$ (USD)  | 474:00 h                 | 28,588.00 \$ (USD)  | 454:15 h      | 27,666.00 \$ (USD)  | 00:00 h                      | 0.00 \$ (USD)       |
| External Team:                                                                                  |  | 800 h           | 30,400.00 \$ (USD)  | 694:00 h                 | 22,208.00 \$ (USD)  | 413:45 h      | 13,240.00 \$ (USD)  | 261:00 h                     | 8,352.00 \$ (USD)   |
| Undefined Team:                                                                                 |  | 0 h             | 0.00 \$ (USD)       | 00:00 h                  | 0.00 \$ (USD)       |               |                     |                              |                     |
| <b>Total Workforce:</b>                                                                         |  | 1500 h          | 59,800.00 \$ (USD)  | 1168:00 h                | 50,796.00 \$ (USD)  | 868:00 h      | 40,906.00 \$ (USD)  | 261:00 h                     | 8,352.00 \$ (USD)   |
| Purchases Budget:                                                                               |  |                 | 200,000.00 \$ (USD) |                          | 207,500.00 \$ (USD) |               | 110,000.00 \$ (USD) |                              | 110,000.00 \$ (USD) |
| <b>Total Project Budget:</b>                                                                    |  |                 | 259,800.00 \$ (USD) |                          | 258,296.00 \$ (USD) |               | 150,906.00 \$ (USD) |                              | 118,352.00 \$ (USD) |
| Top-down - bottom-up:                                                                           |  |                 | 1,504.00 \$ (USD)   |                          |                     |               |                     |                              |                     |
| Internal Cost Center: CEO 03.4.5                                                                |  |                 |                     |                          |                     |               |                     |                              |                     |

- ✓ **Budget:** ① This is the amount of money assigned to the project. This is also what we call *top-down*, because it goes from the decision on how much money to make available for the project down to a more detailed analysis. This can be defined as a total amount for the project, setting other figures depending on whether they refer to internal or external staff, etc.
- ✓ **Cost Estimate** or *bottom-up* ②: This is the cost assessment made by the system based on the hours and procurement estimates made by the Project Manager at the planning stage. For example, let's say that the project will consume "n1" hours on one task and "n2" hours on another, and that it will use "z1" materials for manufacturing and "z2" materials for commercial activity. The sum total of all these figures will produce an estimated cost as the schedule and project are updated with progress over time.
- ✓ **Real:** ③ This is easier to understand, probably the most helpful aspect and that which makes the system complete. It shows the number of hours reported by each member of the project team. Calculated in real time and based on standard costs and fees, they are used to generate real consumption and cost figures at any given time. Similarly, any invoices received and assigned to the project will be added to the corresponding section.

The procurement calculation is not a complex one. It merely allows for the separation of invoices under different budgetary headings and for each invoice to be assigned to specific suppliers.

However, the **hourly cost calculation** deserves a little more explanation:

ITM Platform includes a comprehensive **standard cost** system that enables values to be set for each **professional profile**, whether they relate to **internal** or **external personnel**. The Project Manager need not be concerned with establishing these relationships as the system does so automatically when allocating the project team to the tasks and estimating their effort.



## Project Budget and Costs Diagram

### ITM PLATFORM Generación de Presupuestos / Proyecto

El PRESUPUESTO establece los valores asignados al inicio del proyecto. A medida que se asignan esfuerzos se calcula automáticamente la ESTIMACIÓN del proyecto. Los datos REALES muestran los valores del trabajo realizado y las compras en el momento actual. Los datos REALES AL CIERRE muestran éstos últimos consolidados a la fecha del último cierre (típicamente mensual).

 **PROYECTOS SERVICIOS**

**PRESUPUESTO**  
Por componente 

**ESTIMACION**  
(Horas y compras)

**ESTIMACIÓN de ESFUERZOS**  
(Horas y sus costes) 

**PRESUPUESTO de COMPRAS**  
(Costes) 

 **TAREAS**

Por cada tarea se pueden prever ESTIMACIONES DE ESFUERZO, tanto para perfiles profesionales como para usuarios específicos que intervengan en ella. Posteriormente, cada miembro de equipo podrá cumplimentar su parte de horas REAL.

 **COMPRAS**

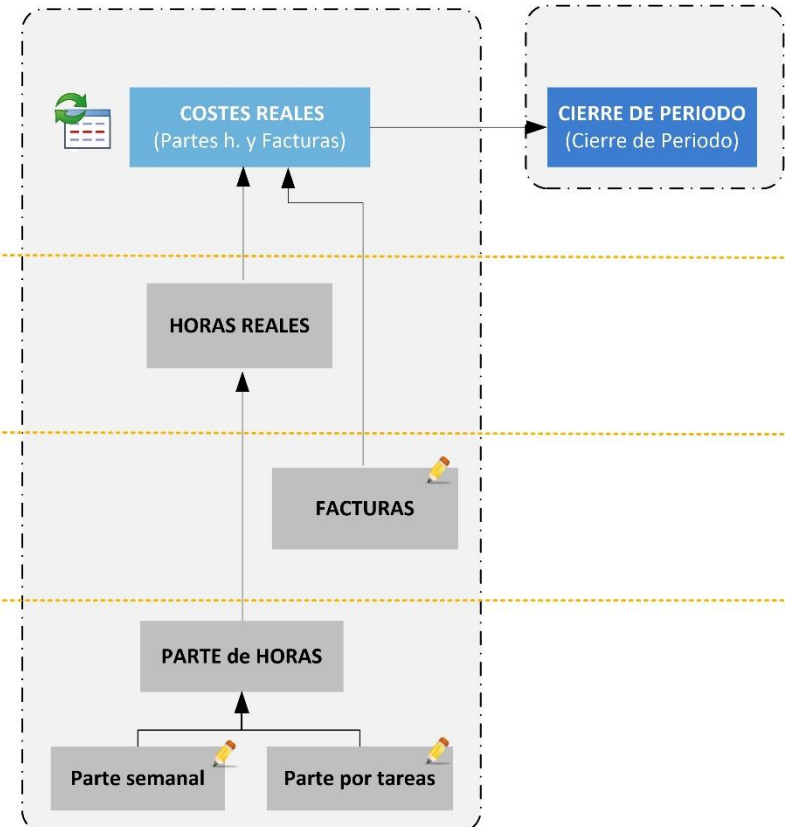
Puede confeccionarse un presupuesto de compras detallado por cada componente, que se sumará a la ESTIMACIÓN de coste del mismo. Posteriormente podrán imputarse facturas, incrementando así el coste REAL en dichos conceptos.

 **USUARIOS**

Cada usuario podrá cumplimentar un PARTE DE HORAS de sus tareas asignadas. Existen dos modalidades: parte semanal o parte por tarea en rangos de fechas.

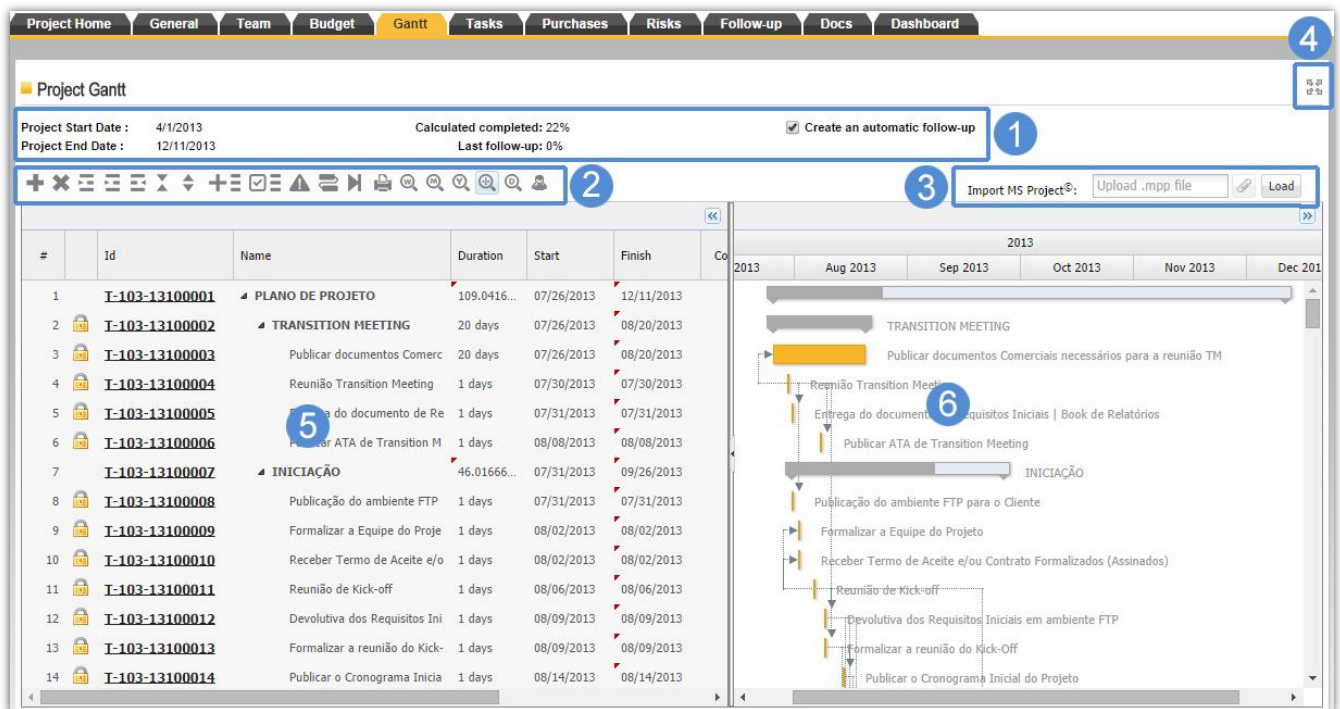


Los COSTES REALES se actualizan automáticamente con los valores finales de los proyectos, servicios, programas y portfolio en base a las entradas (horas, facturas)



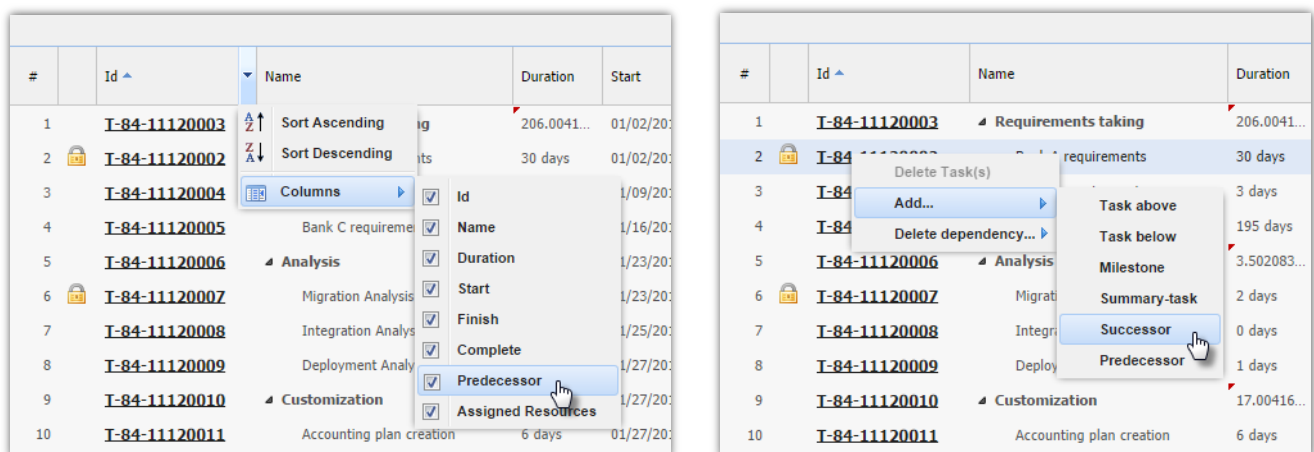
## 6. Schedule (Gantt Chart)

The ITM Platform Gantt Chart module will allow you to perform most of the roles associated with the project tasks. You will find the following main sections:



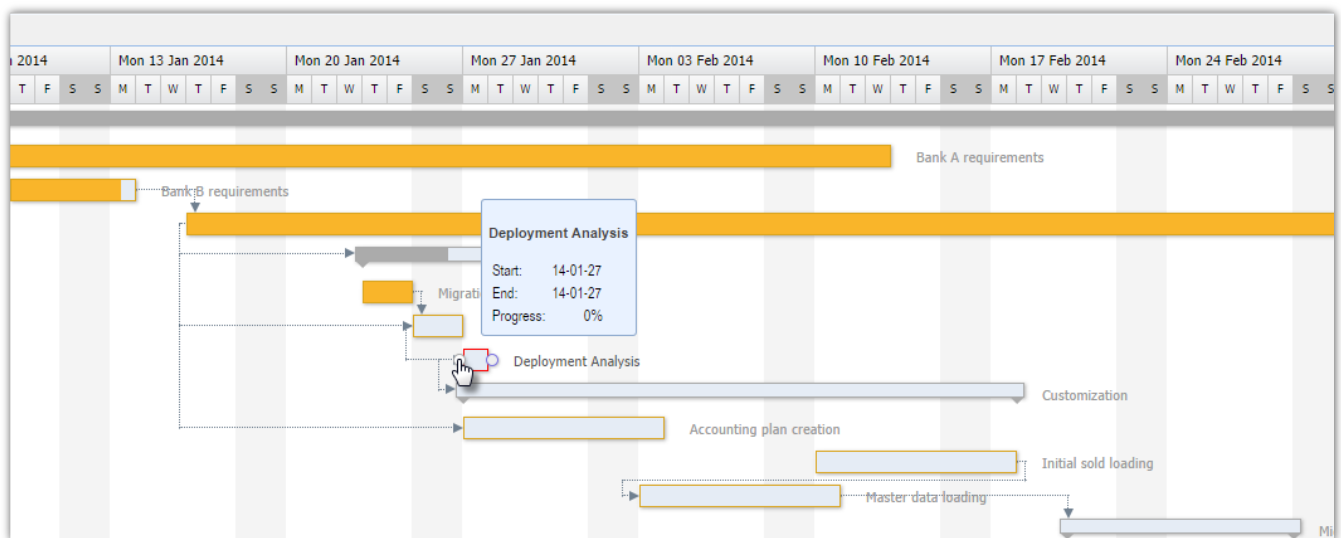
- 1 Section on project dates and supervision information
- 2 Bar containing buttons for task control (task creation, base line, printing, zoom, etc.)
- 3 Import from MS Project®
- 4 Full screen
- 5 Column control
- 6 Graphic display

The column control section can be used to select those columns that you wish to display. Various actions related to the task in question can be performed by right-clicking on your mouse.

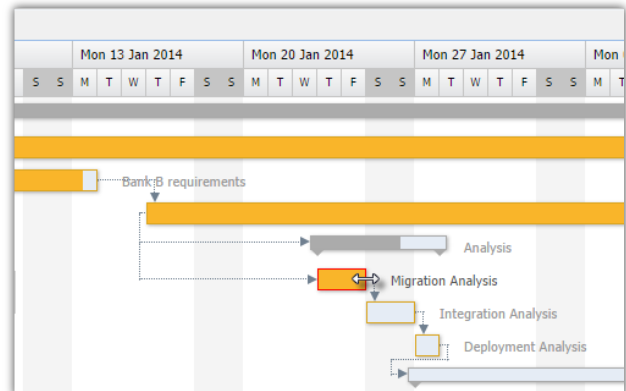
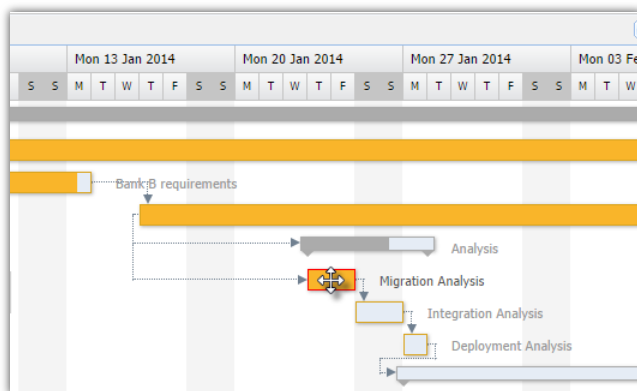


The right-hand graphic display panel can be used to perform the same actions on tasks as by right-clicking on your mouse in the columns panel, as well as:

**Establish dependencies** by dragging from the location of the start task (beginning or end) and releasing at the location of the end task:



And **move a task**, either as a whole or only one end thereof by dragging and releasing as required.



You may see the following icons that affect the actions you are able to perform:



(Half-closed padlock) **Task begun**: the start date cannot be moved.



(Fully-closed padlock) **Closed task**: no dates can be moved.

## 7. List of Tasks

The list of tasks is a **customisable and dynamic report** on the tasks that comprise the project. It is very helpful for identifying tasks on the verge of completion, those with a status that requires your attention and those in which a specific individual is involved.

In this example, we wish to identify those tasks that are currently under way or pending **1** but we also wish to view certain information fields **2**, which will be displayed in the columns.

| Parent Name                | Due Date  | Follow Up By | Start Date | Status      |
|----------------------------|-----------|--------------|------------|-------------|
|                            | 5/6/2014  | Full         | 4/1/2014   | In Progress |
| <u>Generals conditions</u> | 5/6/2014  | Support      | 4/1/2014   | In Progress |
| <u>Generals conditions</u> | 4/29/2014 | Support      | 4/29/2014  | In Progress |
| <u>Generals conditions</u> | 4/30/2014 | Support      |            |             |
|                            | 5/2/2014  | Support      | 5/1/2014   | In Progress |
| <u>Work in place</u>       | 5/1/2014  | Support      | 5/1/2014   | In Progress |
| <u>Work in place</u>       | 5/2/2014  | Support      | 5/2/2014   | In Progress |
|                            | 6/17/2014 | Support      | 5/3/2014   | In Progress |
| <u>Foundations</u>         | 5/7/2014  | Support      | 5/3/2014   | In Progress |
| <u>Foundations</u>         | 6/17/2014 | Support      | 5/8/2014   | In Progress |

Furthermore, as is the case for all dynamic lists within ITM Platform, you can **export** the content to **MS Excel®** **3**.

### Moving Task Blocks from the List of Tasks

| Category | Task Name                   | Parent Name                |
|----------|-----------------------------|----------------------------|
| ◆        | <u>Validación final</u>     | <u>Testing</u>             |
| ▼        | <u>Testing</u>              |                            |
| ▼        | <u>Requirements taking</u>  |                            |
| ■        | <u>Bank A requirements</u>  | <u>Requirements taking</u> |
| ■        | <u>Bank B requirements</u>  | <u>Requirements taking</u> |
| ■        | <u>Bank C requirements</u>  | <u>Requirements taking</u> |
| ▼        | <u>Analysis</u>             |                            |
| ■        | <u>Migration Analysis</u>   | <u>Analysis</u>            |
| ■        | <u>Integration Analysis</u> | <u>Analysis</u>            |
| ■        | <u>Deployment Analysis</u>  | <u>Analysis</u>            |

From the list itself, select those tasks you wish to move and click "Move Dates".

If none of the tasks has been started yet (in other words, no supervision activity or reported hours), a dialogue box will ask you to enter a start date **3** for the first task, respecting the dependencies and distances between all the other dates within the block.

| Task ID       | Task Name                | Start Date | End Date  |
|---------------|--------------------------|------------|-----------|
| 1.00.11120010 | Customization            | 1/27/2014  | 2/17/2014 |
| 1.00.11120011 | Accounting plan creation | 1/27/2014  | 2/3/2014  |
| 1.00.11120012 | Initial yield loading    | 2/19/2014  | 2/17/2014 |
| 1.00.11120013 | Master data loading      | 2/3/2014   | 2/19/2014 |



## 8. Managing Tasks

Click on the **MANAGEMENT** menu, then **Projects** and select the **project 1** in which you wish to create the task.

In the **Tasks** section 2, you will be able to create three basic types of task 3: milestone, summary task or standard task.

ITM Platform  
Projects & Portfolio

Projects / Project: New industrial unit construction

Project: New industrial unit construction

Project Home General Team Budget Schedule **Tasks** Purchases Risks Follow-up Docs Dashboard

Filter

Task Name: Start Date: Due Date: Status: Apply Reset

Category: All Priority: All

Project Tasks

3 Add New Export to Excel

| Category | Task Name                                        | Parent Name | Due Date  | Follow Up By | Start Date | Status      |
|----------|--------------------------------------------------|-------------|-----------|--------------|------------|-------------|
|          | Place concrete for foundations and basement w... | Foundations | 6/11/2014 | Support      | 5/27/2014  | In Progress |
|          | Waterproof / insulate basement walls             | Foundations | 6/13/2014 | Support      | 6/12/2014  | In Progress |
|          | Structure                                        |             | 7/4/2014  | Support      | 6/14/2014  | In Progress |
|          | Install the joists                               | Structure   | 6/17/2014 | Support      | 6/14/2014  | In Progress |
|          | Put cover                                        | Structure   | 6/19/2014 | Support      | 6/18/2014  | In Progress |
|          | Frame walls                                      | Structure   | 6/25/2014 | Support      | 6/20/2014  | In Progress |
|          | Sharpen corners                                  | Structure   | 6/26/2014 | Support      | 6/26/2014  | In Progress |
|          | Install 2nd floor joists                         | Structure   | 6/28/2014 | Support      | 6/27/2014  | In Progress |
|          | Roof structure                                   | Structure   | 7/3/2014  | Support      | 7/1/2014   | In Progress |
|          | Inspection structure                             | Structure   | 7/4/2014  | Support      | 7/4/2014   | In Progress |

42 items in 5 pages

Please select Update Status Delete Task Move Dates

The task file is similar to the project file but merely represents a smaller work unit in which you can configure the general 4 and classification information for the task, allocate the team 5 that will work on it, estimate the effort 6 that each member will need to invest, perform supervision activities 7 or upload documentation 8:

Projects / Project: New industrial unit construction / Place concrete for foundations and basement walls

Project: New industrial unit construction

Project Home General Team Budget Schedule **Tasks** Purchases Risks Follow-up Docs Dashboard

General 4 5 6 7 8

Task Name: Place concrete for foundations and basement walls

Task ID: T-1528-13080011

Description:

**Project tasks**

All project activities are organized into tasks, which may be of the following types:

- Summary** A grouping of other tasks.
- Milestones** Achievements or deliverables.
- Tasks** Activities which pursue the objectives set.

This description of the task will provide all members with a context. If necessary, use the "Documents" section to add shared content or initiate conversations about this from the "Share and update" box at the top.

Status: In Progress Parent Summary Task: Foundations

Type: Generic Priority: Normal

## Task Effort Estimation

Correctly estimating the necessary effort is very important for:

- ✓ The global estimation of **resources**
- ✓ Measuring individual **performance**
- ✓ **Cost** estimation (*bottom-up* budget)

The fastest method is to perform this estimation per task and user in the “Estimated Effort” sub-section ① of the “Team” tab.

| Task                                       | Estimated Effort | Actual Effort | Accepted Effort |
|--------------------------------------------|------------------|---------------|-----------------|
| Review campaign concepts                   | 4:00             | 50:00         | 4:00            |
| Identify leads / opportunities             | 4:00             |               | 4:00            |
| Develop the agenda for the campaign        | 12:00            |               | 10:00           |
| Determine the calls to action              | 4:00             |               | 4:00            |
| Determine the methods of advertising a...  | 12:00            |               | 10:00           |
| Creative development of the campaign an... | 4:00             |               | 4:00            |
| Send campaign for broadcast material       | 12:00            | 50:00         | 10:00           |

All you need to do is open the hours table and enter the estimated figures ②. In the “Accepted Effort” sub-section, you will then be able to see the estimated figures compared with the figures reported by the user and, if so desired, change the value.

You can also perform these estimates from the “Effort” sub-section of the task, both per user ③-⑤ and per professional profile ④-⑥ if there is no information on who will carry out the function.

| Professional Category           | Assigned Effort | Unassigned Effort | Total Estimated Effort | Actual Effort By Timeentry | Actual Effort Accepted |
|---------------------------------|-----------------|-------------------|------------------------|----------------------------|------------------------|
| Administrative staff (External) | 30:00           | 0:00              | 30:00                  | 25:00                      | 25:00                  |
| Engineer (Internal)             | 10:00           | 0:00              | 10:00                  | 5:00                       | 5:00                   |
| Controller (Internal)           | 50:00           | 0:00              | 50:00                  | 39:00                      | 39:00                  |
| General (no category)           | 0:00            | 0:00              | 0:00                   | 0:00                       |                        |
|                                 | 90:00 h         | 0:00 h            | 90:00 h                | 69:00 h                    | 69:00 h                |

| Name            | Professional Category           | Estimated Effort | Actual Effort By Timeentry | Actual Effort Accepted |
|-----------------|---------------------------------|------------------|----------------------------|------------------------|
| Travis Orellana | Engineer (Internal)             | 10:00            | 5:00                       | 5:00                   |
| Marga Simon     | Administrative staff (External) | 30:00            | 25:00                      | 25:00                  |
| Full Access     | Controller (Internal)           | 50:00            | 39:00                      | 39:00                  |



## Over-allocation of Estimated Time

Each user in ITM Platform can have a work schedule allocated per day of the week so that, when task allocation and the corresponding effort estimates exceed the number of man hours available, the system will issue an **alert** that can then be managed.

These alerts can be found in the List of Tasks by selecting the “Over-allocated” option **1** from the list of fields to be shown **2**.

**Project Tasks**

Filter: Task Name, Start Date, Due Date, Category: All, Priority: All, Status: All. [Apply] [Reset]

Project Tasks: [Add New] [Export to Excel]

| Task Name | Duration | Due Date  | Actual Effort | OverAllocation | % Completed | Priority | Start Date | Est Effort |
|-----------|----------|-----------|---------------|----------------|-------------|----------|------------|------------|
| 50006     | 10 d     | 9/11/2014 | 00:00 h       | [Alert Icon]   | 0%          | Normal   | 8/29/2014  | 80:00 h    |
| 50007     | 157 d    | 4/7/2015  | 00:00 h       |                | 80%         |          | 8/30/2014  | 00:00 h    |
| 50008     | 20 d     | 9/26/2014 | 00:00 h       |                | 0%          | Normal   | 8/30/2014  | 00:00 h    |
| 50011     | 100 d    | 1/16/2015 | 00:00 h       |                | 0%          |          | 8/30/2014  | 00:00 h    |
| 50012     | 50 d     | 11/7/2014 | 00:00 h       |                | 0%          | Normal   | 8/30/2014  | 00:00 h    |
| 50028     | 10 d     | 9/28/2014 | 00:00 h       |                | 0%          | Normal   | 9/13/2014  | 00:00 h    |
| 50079     | 4 d      | 9/29/2014 | 00:00 h       | [Alert Icon]   | 0%          | Normal   | 9/24/2014  | 48:00 h    |
| 50009     | 137 d    | 4/7/2015  | 00:00 h       | [Alert Icon]   | 0%          | Normal   | 9/27/2014  | 00:00 h    |
| 50010     | 10 d     | 11/7/2014 | 00:00 h       | [Alert Icon]   | 0%          | Normal   | 10/25/2014 | 00:00 h    |
| 50013     | 50 d     | 1/16/2015 | 00:00 h       | [Alert Icon]   | 0%          | Normal   | 11/8/2014  | 00:00 h    |

... or from the “Effort” sub-section of the task, by highlighting the over-allocation of users **3** from the professional profiles **4**.

**Summary of: "Closure plans and beginning of estimation."**

Task Start Date: 4/1/2014, End Date: 5/6/2014, Duration: 26 days  
 Total Estimated Effort: 90:00 h, Actual Effort: 69:00 h 76%

**Assign by Professional Category**

| Professional Category           | Assigned Effort  | Unassigned Effort | Total Estimated Effort | Actual Effort By Timeentry | Actual Effort Accepted | Delete |
|---------------------------------|------------------|-------------------|------------------------|----------------------------|------------------------|--------|
| Administrative staff (External) | 30 : 00          | 0 : 00            | 30 : 00                | 25 : 00                    | 25 : 00                |        |
| Engineer (Internal)             | 10 : 00          | 0 : 00            | 10 : 00                | 5 : 00                     | 5 : 00                 |        |
| Controller (Internal)           | 50 : 00          | 0 : 00            | 50 : 00                | 39 : 00                    | 39 : 00                |        |
| General (no category)           | 0 : 00           | 0 : 00            | 0 : 00                 | 0 : 00                     |                        |        |
| <b>Total</b>                    | <b>90 : 00 h</b> | <b>0 : 00 h</b>   | <b>90 : 00 h</b>       | <b>69 : 00 h</b>           | <b>69 : 00 h</b>       |        |

**Assign by Team Member**

| Name            | Professional Category           | Estimated Effort | Actual Effort By Timeentry | Actual Effort Accepted |
|-----------------|---------------------------------|------------------|----------------------------|------------------------|
| Travis Orellana | Engineer (Internal)             | 10 : 00          | 5 : 00                     | 5 : 00                 |
| Marga Simon     | Administrative staff (External) | 30 : 00          | 25 : 00                    | 25 : 00                |
| Full Access     | Controller (Internal)           | 50 : 00          | 39 : 00                    | 39 : 00                |

## 9. Procurement and Acquisitions

Procurement and acquisitions are understood as **external costs** that are not measured in man hours or not registered in the system but the associated costs need to be included.

These costs will form part of the estimated costs via the definition of budgetary headings ① and the real costs based on invoices received ②.

**Budget for Purchases**

| # | Budget Account Name          | Amount        | Used To Date |
|---|------------------------------|---------------|--------------|
| 1 | Materials                    | 125,000.00 \$ | ■■■■■        |
| 2 | Architecture and engineering | 60,000.00 \$  | ■■■■■        |
| 3 | Legal advisory services      | 12,500.00 \$  | ■■■■■        |
| 4 | MATERIALES x                 | 10,000.00 \$  | ■■■■■        |

Total Budget: 207,500.00 \$

**Manage Purchases Invoice**

| Invoice Date | Due date | Invoice No | Description                          | Type    | Budget Account               | Provider                | Amount       |
|--------------|----------|------------|--------------------------------------|---------|------------------------------|-------------------------|--------------|
| 2/6/2014     | 3/8/2014 | MC.8890-13 | Phase 1. Items needed for the con... | Good    | Materials                    | Quality Materials, Spa. | 29,000.00 \$ |
| 5/6/2014     | 6/5/2014 | MC.7474-13 | Phase 2. Items needed for the con... | Good    | Materials                    | Quality Materials, Spa. | 25,000.00 \$ |
| 2/5/2014     | 3/7/2014 | IA-3543 P  | Flat structure                       | Service | Architecture and engineering | Blue Engineering        | 22,000.00 \$ |

As Project Manager, you can allocate received **invoices** to the project and allocate them to each **heading**. It is also possible for someone outside of the project to allocate invoices via a specific management section set up for this purpose.

### Reflection of Procurement in Budgets

The amount of money available for procurement is defined in the "Budget" section ①. When the available budgetary headings are established, these can be found in the "Cost Estimate" section ② and, when they finally arrive and invoices are allocated, they are reflected in the corresponding "Real Values" sections ③, whether at the time or when finally closing the period.

**Budget**

|                       | Top Down Budget |                     | Bottom-up Estimated Cost |                     | Actual Values |                     | Last Period End Close Values |                     |
|-----------------------|-----------------|---------------------|--------------------------|---------------------|---------------|---------------------|------------------------------|---------------------|
|                       | Hours           | Cost                | Hours                    | Cost                | Hours         | Cost                | Hours                        | Cost                |
| Internal Team:        | 700 h           | 29,400.00 \$ (USD)  | 474.00 h                 | 28,588.00 \$ (USD)  | 454.15 h      | 27,666.00 \$ (USD)  | 00.00 h                      | 0.00 \$ (USD)       |
| External Team:        | 800 h           | 30,400.00 \$ (USD)  | 694.00 h                 | 22,208.00 \$ (USD)  | 413.45 h      | 13,240.00 \$ (USD)  | 261.00 h                     | 8,352.00 \$ (USD)   |
| Undefined Team:       | 0 h             | 0.00 \$ (USD)       | 00.00 h                  | 0.00 \$ (USD)       |               |                     |                              |                     |
| Total Workforce:      | 1500 h          | 59,800.00 \$ (USD)  | 1168.00 h                | 50,796.00 \$ (USD)  | 868.00 h      | 40,906.00 \$ (USD)  | 261.00 h                     | 8,352.00 \$ (USD)   |
| Purchases Budget:     |                 | 200,000.00 \$ (USD) |                          | 207,500.00 \$ (USD) |               | 110,000.00 \$ (USD) |                              | 110,000.00 \$ (USD) |
| Total Project Budget: |                 | 259,800.00 \$ (USD) |                          | 258,296.00 \$ (USD) |               | 150,906.00 \$ (USD) |                              | 118,352.00 \$ (USD) |
| Top-down - bottom-up: |                 | 1,504.00 \$ (USD)   |                          |                     |               |                     |                              |                     |

Internal Cost Center: CEO 03.4.5

## 10. Risks

ITM Platform enables the identification and management of project risks, in other words, those potential events that would adversely affect the project were they to occur.

Besides the classification data, the system will propose a **Level of Exposure** ③ that is calculated according to the values assigned to the **"Impact"** ① that it would cause were it to occur multiplied by the **"Probability"** ② of occurrence.

Risk No: R-1147-13090021

\* Risk Name: Loss of key personnel

Description: ITM Platform uses this event to calculate the level of exposure to each risk.

|             |   |   |    |    |    |  |
|-------------|---|---|----|----|----|--|
| Probability | 4 | 4 | 20 | 28 | 40 |  |
|             | 3 | 3 | 15 | 21 | 30 |  |
|             | 2 | 2 | 10 | 14 | 20 |  |
|             | 1 | 1 | 5  | 7  | 10 |  |
|             |   | 1 | 5  | 7  | 10 |  |

\* Risk type: Team

\* Risk Status: Analyzed

\* Risk Impact: High(10)

\* Risk Probability: MediumHigh(3)

Risk Level: High

**Contingency** plans can also be drawn up ⑤ to tackle the situation were the risk event to occur and soften the *impact*, as well as **mitigation** plans ④ to be applied in order to reduce the *probability*.

Risk Manager: Full Access

Mitigation Plan: Please select

Full Access

Marga Simon

Travis Orellana

Describe the actions serving to **reduce the probability** that a risk will materialize.

- This plan must include actions to be taken and different options to limit the adversity of the impact.
- It should also include criteria allowing the presence of the risk to be flagged up in advance

See also: <http://www.itmplatform.com/es/blog/2012/07/09/conceptos-basicos-de-la-gestion-de-riesgos>

Contingency Plan:

Contingency Plan

Describe the actions required to prepare for occurrence of the risk and **reduce the impact** which the risk would have on the project if it occurred.

- This plan must include actions to be taken and different options to handle the impact.
- It should also include behavioural criteria shared with the organization.

More about risk management at: <http://www.youtube.com/watch?v=jEq0cQkFgbA&dh=1>

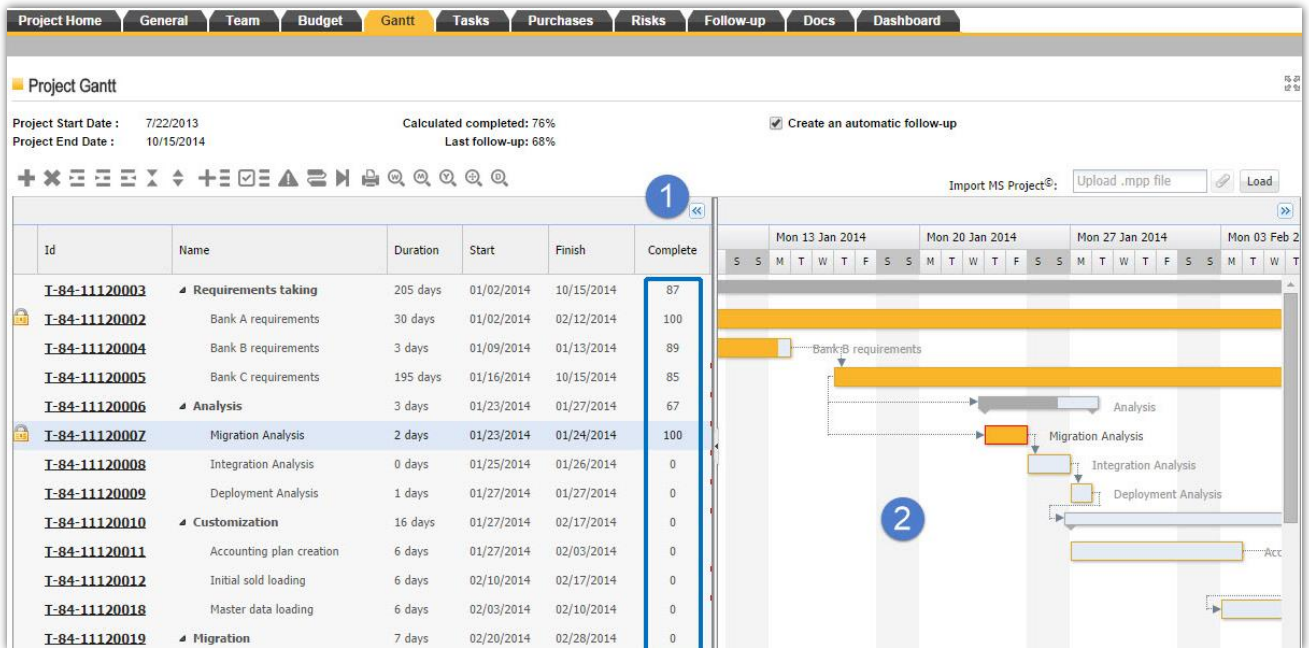
You can appoint a **Risk Manager** ⑥ from among the team members, who will receive a notification on their appointment on both the Communication Panel and in their own email.

## 11. Supervision

The various supervision activities in ITM Platform are grouped together according to the level in question: Task → Project → Programme → Portfolio. Even when it is not essential for achieving a complete distributed work system, reporting on progress from the base line can be very helpful.

### Supervision of Tasks

It is possible to report on the level of progress on tasks **from the Gantt Chart** via the “Completed” column **1**, which can even be managed with the mouse wheel to display a graphic strip showing progress on the task **2**.



However, more comprehensive supervision can be undertaken **within the task** from the “Supervision” sub-section by allocating a subjective visual assessment **3**, establishing a progress percentage **4** (where 100% will close the task) and specifying whether you want the system to update progress on all parent tasks **5**.

Task Manager: Full Access

Assessment: Good

Short Description: Please select

Detail Description: **3**

**4** Percent Completed: 24 **5** Update % complete of parent elements

Follow-up Date: 8/27/2014 Create an automatic project follow-up

Please fill the mandatory fields marked with asterisk

Save Cancel

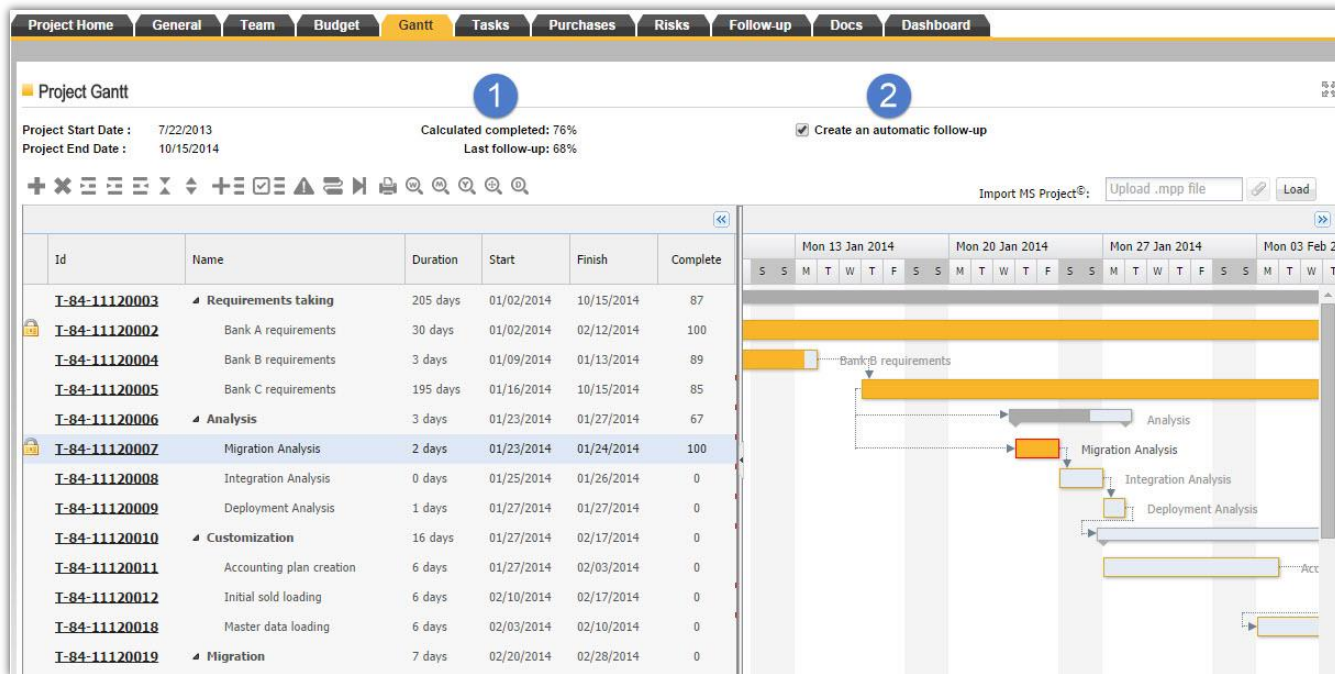
Remember that **any user who is a Team Member can be appointed as Task Manager** and therefore undertake supervision activities on the project without necessarily being the Project Manager.



## Supervision of Projects

The supervision of projects is undertaken in a similar way to the supervision of tasks: from the Gantt Chart or from the supervision section.

By default, if you move the tasks along yourself, the system will inform you of the **calculated progress** ① based on the duration and progress of each one of the constituent tasks.

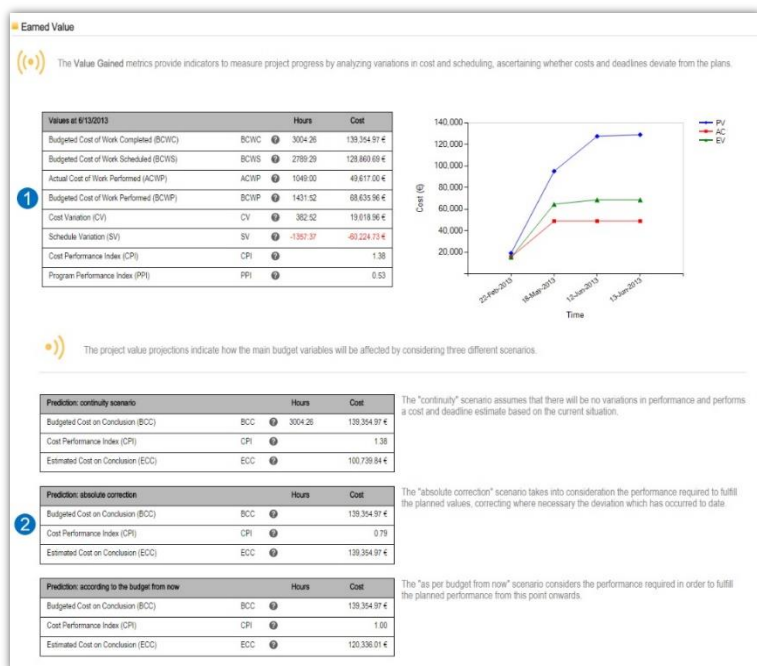


It will also provide you with information on the most recent **supervision activity performed** (manual) and will offer the chance to set up automatic supervision activities ②.

As is the case for tasks, there is a "Supervision" section in the project where you will also find the Value Gained.

## Value Gained

The Management of Value Gained allows you to control execution of the project via its budget and its execution schedule.



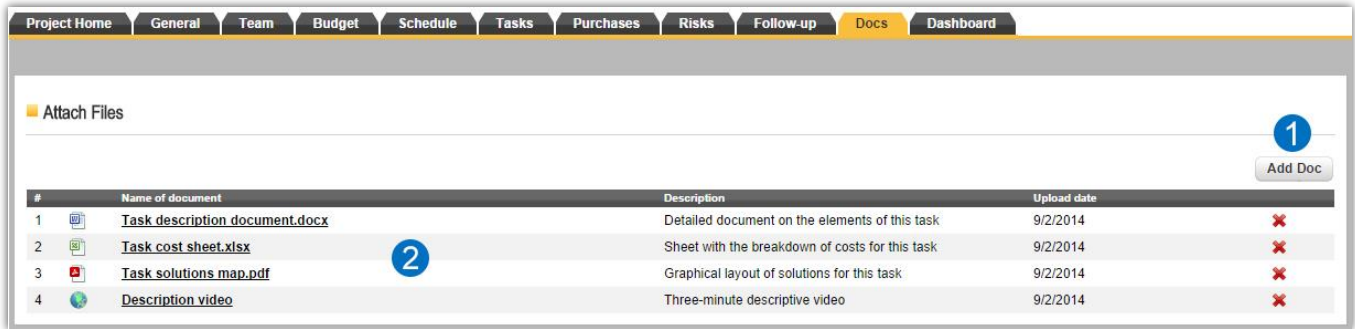
① It compares the amount of work already completed at any given moment with the estimate made before the project was started.

This provides a measurement of how much work has been done, how much remains to be done in order to complete the project and, by extrapolating the effort invested in the project, it can estimate the economic resources that will be required to conclude the project.





② The **scenarios** help you estimate **how it will end** if the conditions used to draw up the Gantt Chart are maintained, either under the same conditions as present to date or if those conditions are altered henceforth.


## 12. Documents

As is the case for tasks, you can upload documents to the projects by clicking on “Add”.



The screenshot shows the 'Docs' tab in the ITM Platform interface. At the top, there is a navigation bar with tabs: Project Home, General, Team, Budget, Schedule, Tasks, Purchases, Risks, Follow-up, Docs (selected), and Dashboard. Below the navigation bar, there is a section titled 'Attach Files' with a blue circle '1' and an 'Add Doc' button. Below this, there is a table with four columns: #, Name of document, Description, and Upload date. The table contains four rows of data. A blue circle '2' is placed over the second row. Each row has a red 'X' icon in the rightmost column.

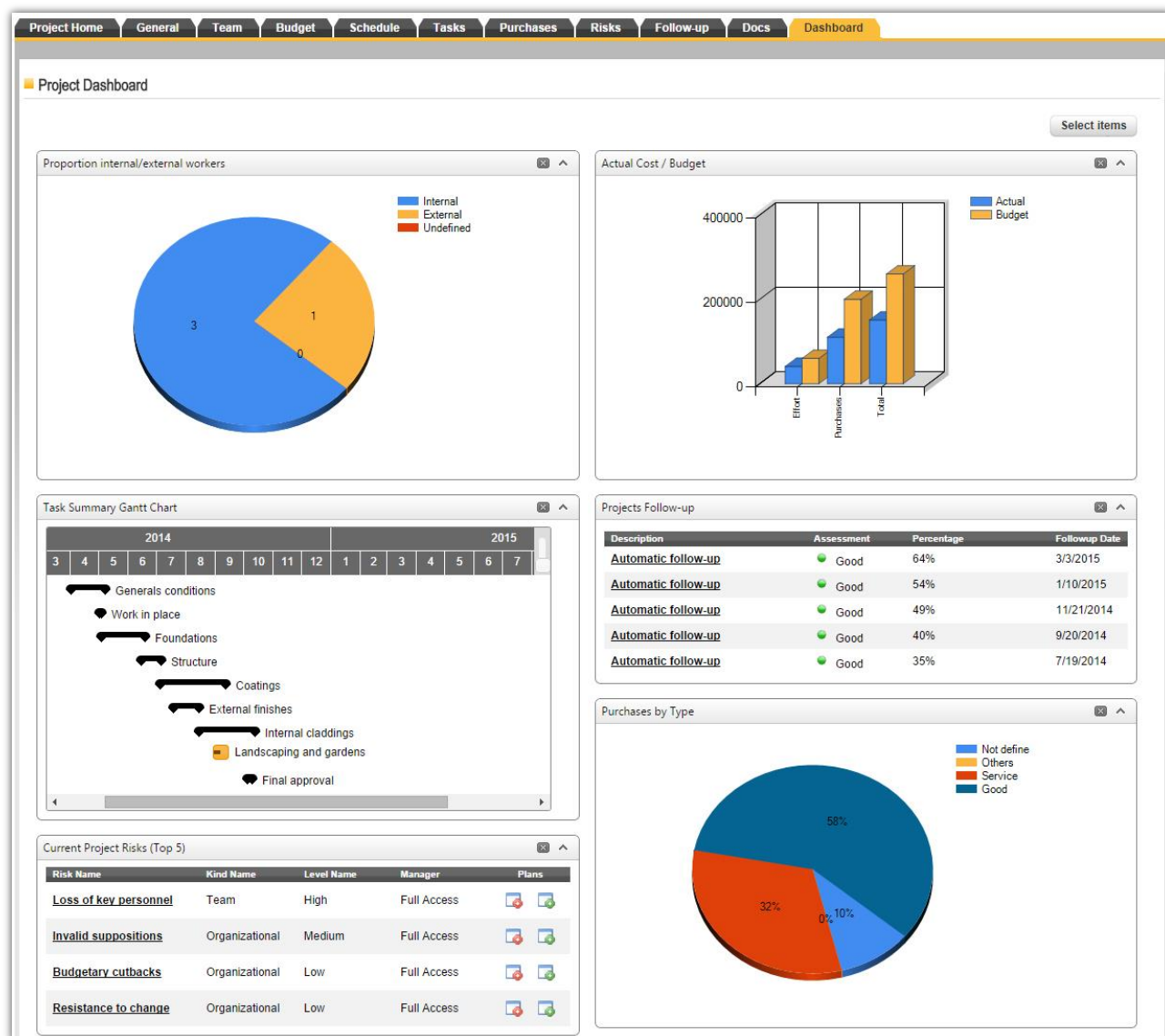
| # | Name of document                                                                                                                 | Description                                     | Upload date |
|---|----------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------|-------------|
| 1 |  <a href="#">Task description document.docx</a> | Detailed document on the elements of this task  | 9/2/2014    |
| 2 |  <a href="#">Task cost sheet.xlsx</a>           | Sheet with the breakdown of costs for this task | 9/2/2014    |
| 3 |  <a href="#">Task solutions map.pdf</a>         | Graphical layout of solutions for this task     | 9/2/2014    |
| 4 |  <a href="#">Description video</a>              | Three-minute descriptive video                  | 9/2/2014    |

Besides **documents**, you can also add **links** - identified by the  icon. This system is especially useful if you already have a document management system that you wish to maintain but whose files you wish to link to ITM Platform.



## 13. Project Control Panel

The control panel displays information on the project taken from the sections described above.



By using the “Select Elements” button, you can choose which graphs and short-lists you wish to be displayed when opening this section.



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Please consult the [Help section](#) or view the [Tutorials](#) on ITM Platform via the contextual Help button