



ITM Platform
PROJECTS • PROGRAMS • PORTFOLIO



Where Strategy Drives Projects





ITM Platform
PROJECTS • PROGRAMS • PORTFOLIO

ITM Platform is the Project Portfolio Management software that aligns your projects to the business strategy.

Team members will learn how to use the fully-featured project and **work management** tools within a day, providing portfolio managers with access to the **metrics that matter**.



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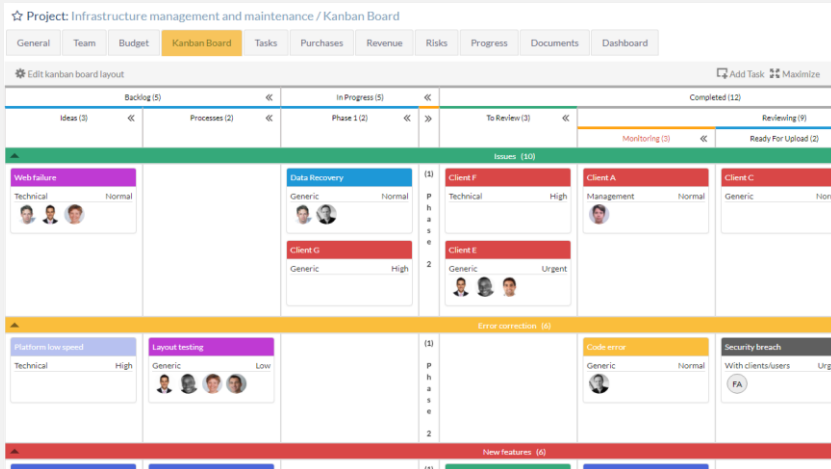
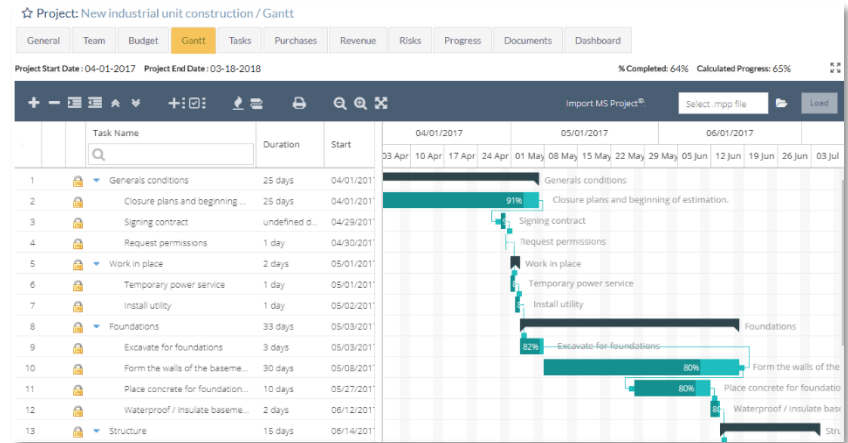
Information & Communication

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Gantt Chart

The classic Project Management tool:
Plan, control and measure time.

Baseline
Critical path
MS Project Imports
Drag & drop
Online planning and monitoring



Agile Projects (Kanban)

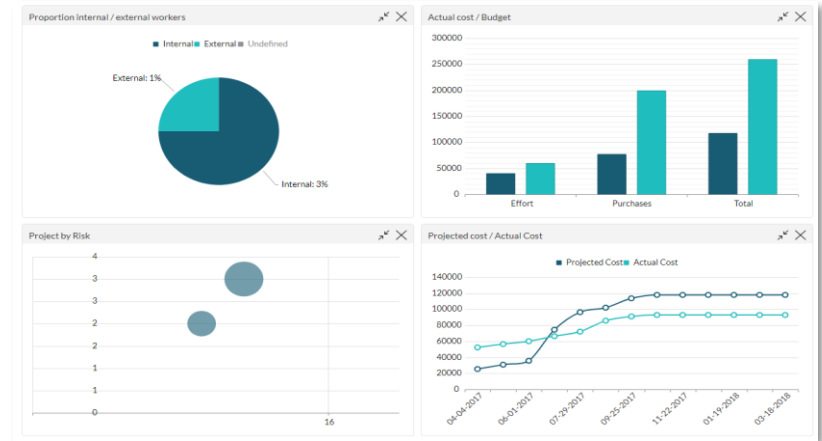
Manage teamwork with full visibility
of all work in progress.

Synchronized Kanban board
Custom columns
Integrated portfolio
Integrated social network
Documentation, monitoring and control

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

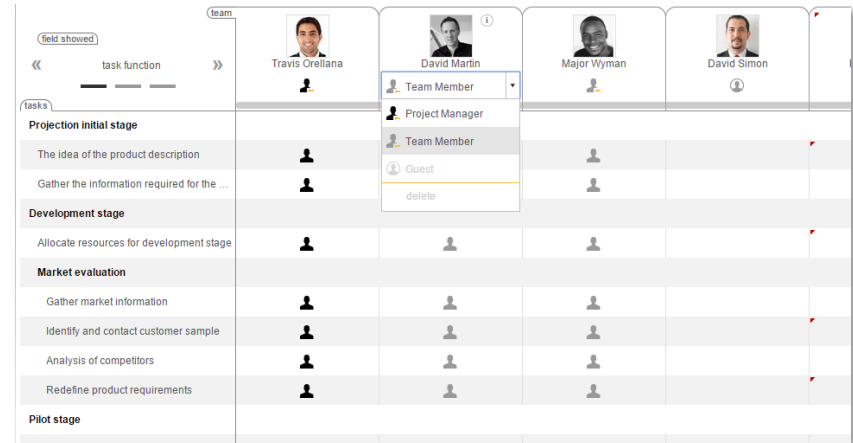
Assign work to your team and monitor progress.

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	Travis Crellana	David Martin	Major Wyman	David Simon
Projection initial stage				
The idea of the product description				
Gather the information required for the ...				
Development stage				
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 project report: Automatic follow-up (03-03-2018)

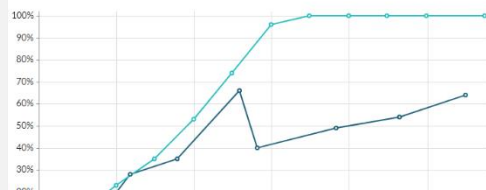
Add Progress Report

view previous progress reports

Assessment: Good



% 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

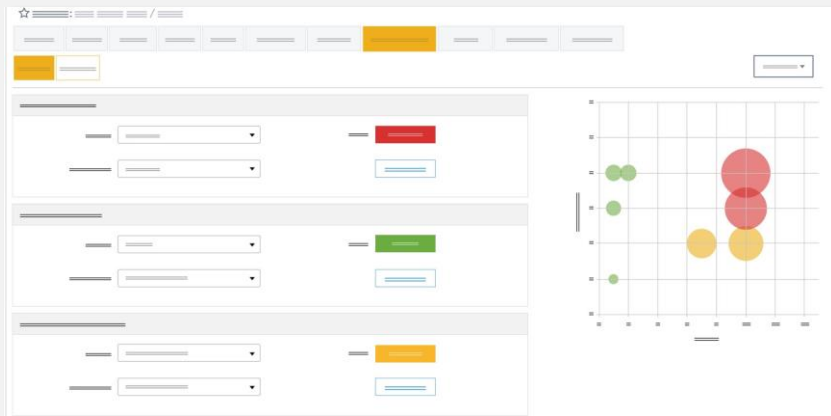
Filter

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 & Issue Management

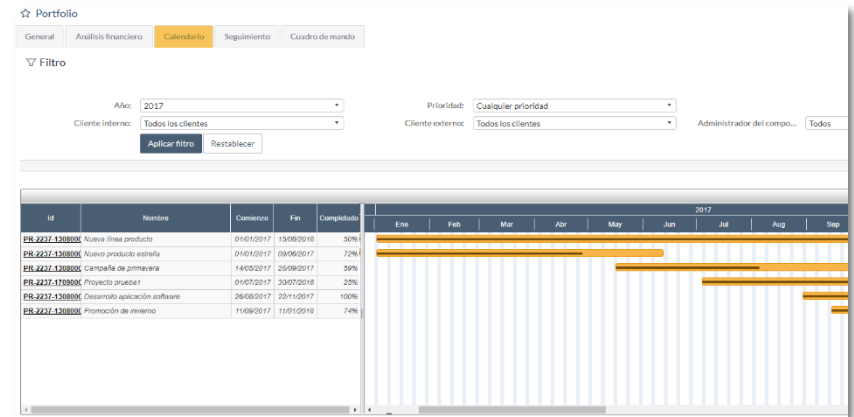
Register and manage risks. Control all issues.

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.

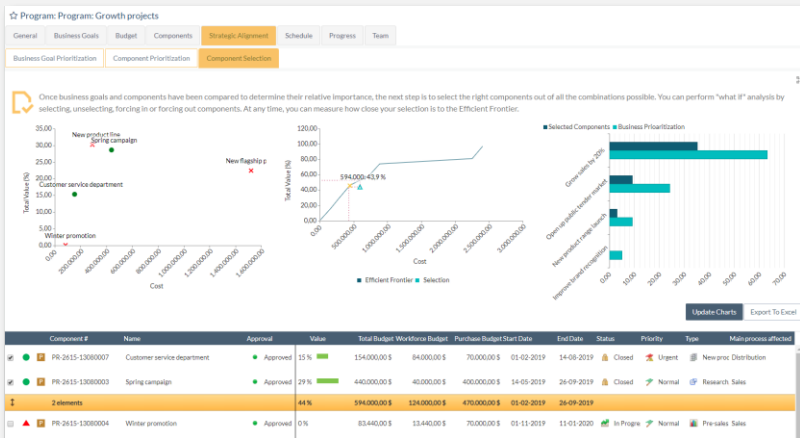
- Combined view of projects, programs and services
- Financial analysis of costs and revenue
- Individualized milestone monitoring
- Project schedule and progress status
- Portfolio dashboard
- Create dependency between projects, services and programs
- Critical road



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

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

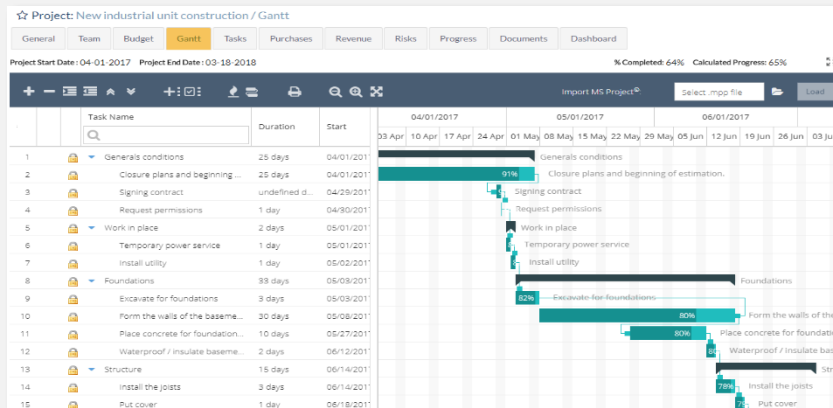
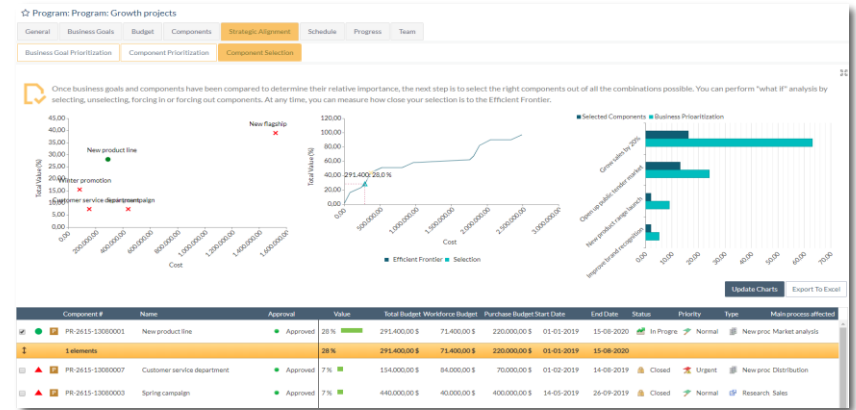
Social communication between members of the service

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

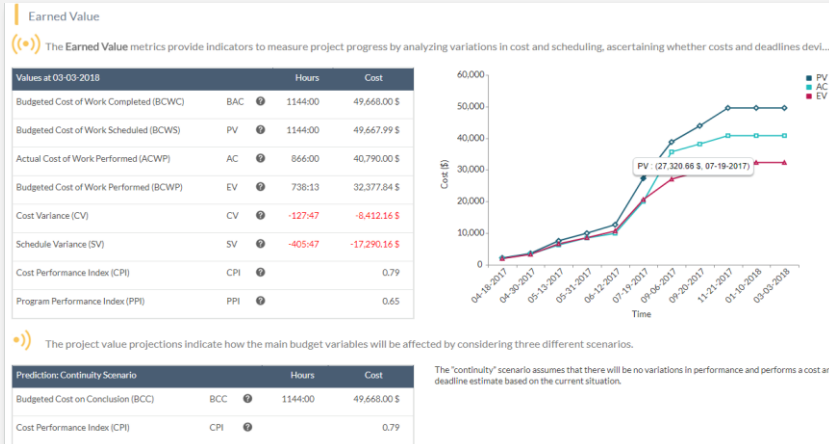
☆ Resources

Planning Analysis

Interval: Day Number: 7 Start: 06-29-2017 Apply Underalloca... 0 It...

Projects & Services	06-29-2017		06-30-2017		07-01-2017		07-02-2017	
	Demand	Allocated	Demand	Allocated	Demand	Allocated	Demand	Allocated
100% TOTAL DEMAND: 264:56H TOTAL ALLOCATED: 264:56H TOTAL GAP: 0:00H	52:32	52:32	15:02	15:02	0:00	0:00	0:00	0:00
▶ New product line	52:32	52:32	15:02	15:02	0:00	0:00	0:00	0:00
▶ Spring campaign	4:24	4:24	4:24	4:24	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
▶ Customer service department	3:16	3:16	3:16	3:16	0:00	0:00	0:00	0:00

Professional categories/Users	06-29-2017		06-30-2017		07-01-2017		07-02-2017	
	Capacity	Availability	Capacity	Availability	Capacity	Availability	Capacity	Availability
▼ Engineer (Internal)	32:00	46:29	32:00	8:59	0:00	0:00	0:00	0:00
David Martin Production Manager	8:00	40:11	8:00	2:41	0:00	0:00	0:00	0:00
▶ New product line				2:41				0:00
▶ Analysis of pilot stage				2:30				0:00



Earned Value

Predict projects outcomes from trends.

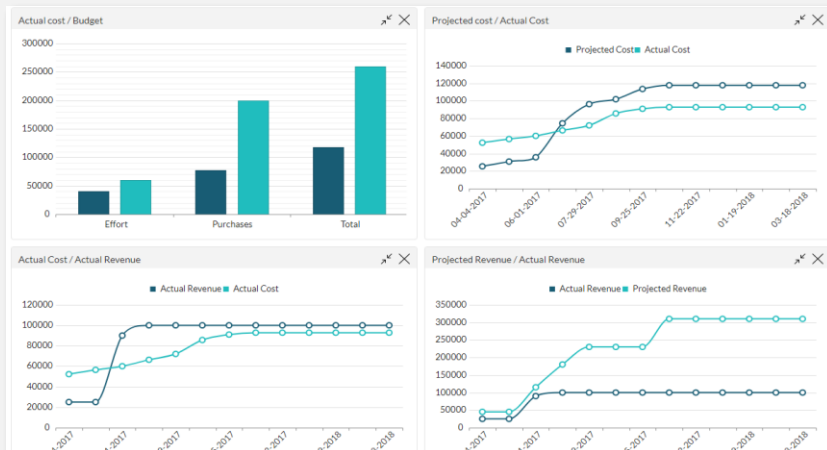
- Performance indicators
- Graphs integrated into progress reports
- Project value projection: absolute correction, continuity and on budget from now

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	Amount
Internal Team:	700:00 h	29,400.00 \$ (USD)	462:00 h	27,844.00 \$ (USD)	452:15 h	27,844.00 \$ (USD)
External Team:	800:00 h	30,400.00 \$ (USD)	682:00 h	21,824.00 \$ (USD)	413:45 h	21,824.00 \$ (USD)
Undefined Team:	00:00 h	0.00 \$ (USD)	00:00 h	0.00 \$ (USD)	0:00 h	0.00 \$ (USD)
Total Workforce:	1500:00 h	59,800.00 \$ (USD)	1144:00 h	49,668.00 \$ (USD)	865:00 h	49,668.00 \$ (USD)
Purchases Budget:		200,000.00 \$ (USD)		197,500.00 \$ (USD)		197,500.00 \$ (USD)
▲ Total Cost:		259,800.00 \$ (USD)		247,168.00 \$ (USD)		247,168.00 \$ (USD)
Total Revenue:		320,000.00 \$ (USD)		310,000.00 \$ (USD)		310,000.00 \$ (USD)
Margin:		60,200.00 \$ (USD)		62,832.00 \$ (USD)		62,832.00 \$ (USD)



Margin and Profitability

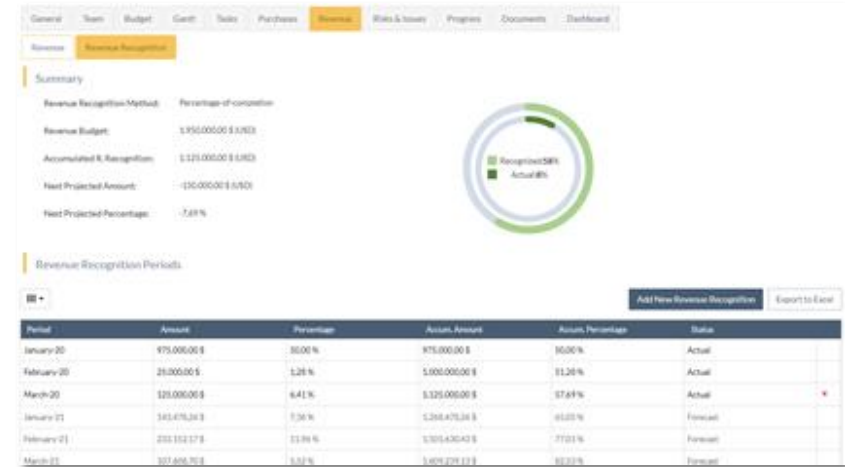
As easy as a sum:
we show you the profitability of projects and clients.

Graphs of projected costs and revenue with analysis
Project and service margin
Aggregated client profitability
Financial analysis of the portfolio

Revenue Recognition

Full control over accrued and deferred revenue:
Actual and forecast.

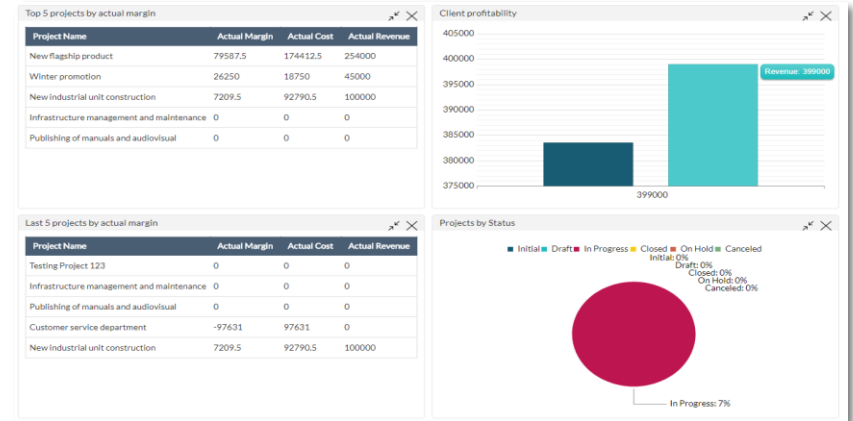
Percentage-of-completion
Linear Distribution by Milestones
Fixed Price per Period
Bill Rate per Estimated Hours
Direct Revenue Recognition



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.

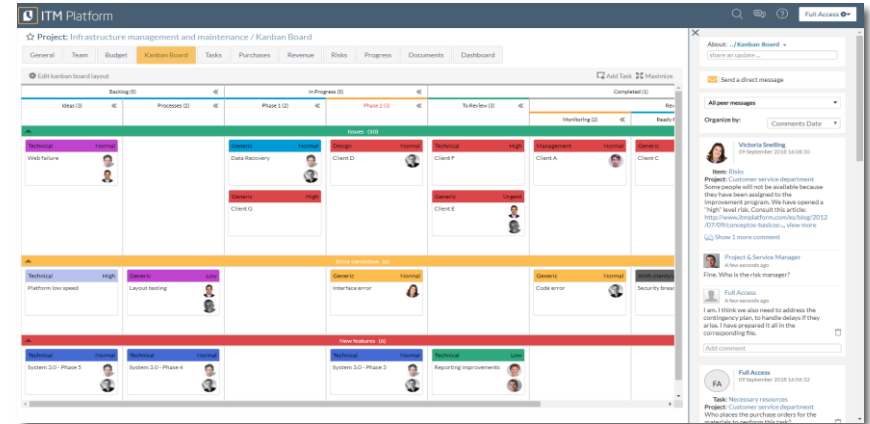
Suppliers of labor and for the general procurement of goods and services
 Administration of supplier files and contact details
 Management and comparison of rates
 Graphic analysis and comparison of supplier costs

Integrated Collaboration Panel

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

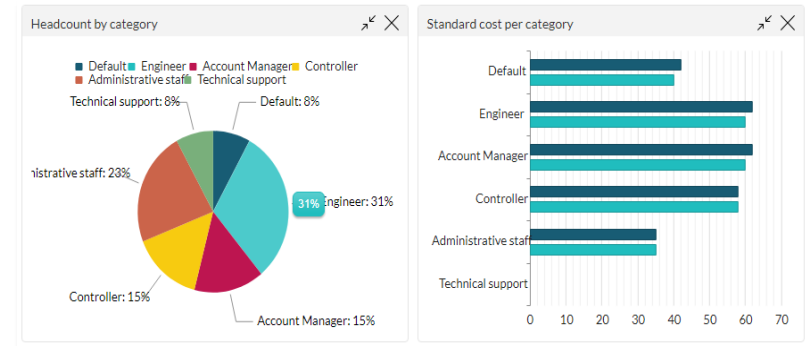
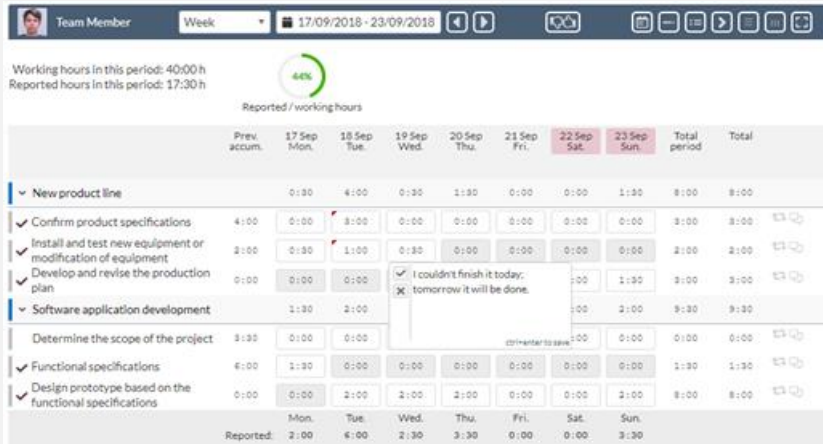


Dashboards

Visualize all project information.

Customizable and pre-designed charts
In real-time

Project modules, portfolio, customers, business targets

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	3:00
▼ Software application development	1:30	2:00						0:00	2:00	3:30
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	0:00	3:30		

Comment: I couldn't finish it today; tomorrow it will be done.

Timesheet

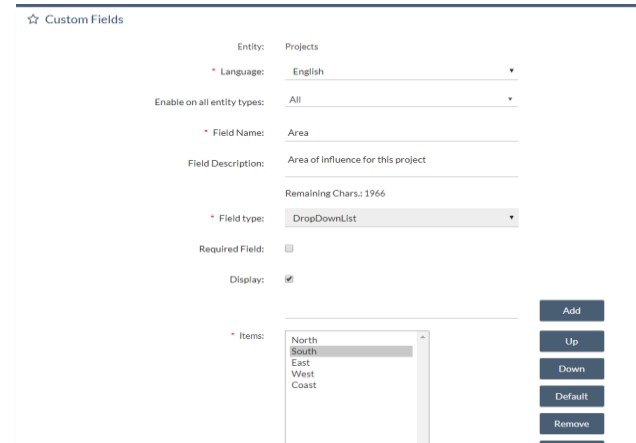
Your day-to-day intuitive and easy working table.

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

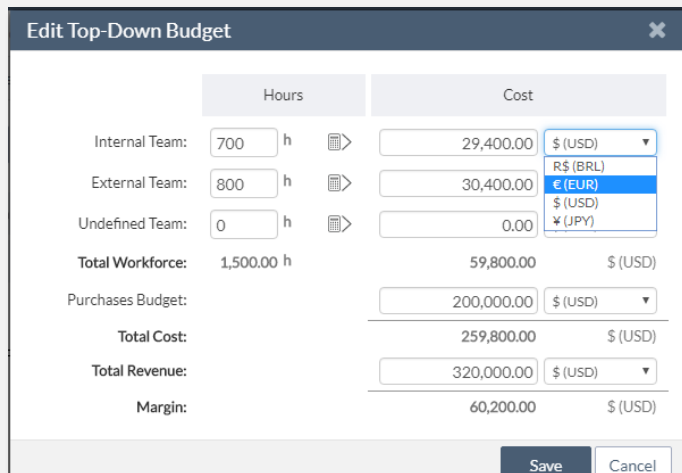
Required Field:

Display:

Items:

- North
- South
- East
- West
- Coast

Buttons: Add, Up, Down, Default, Remove



	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)

Buttons: 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

#	Status Name	Destination status/es	Status Icon	Default
1	Canceled			
2	Closed	Canceled, In Progress, On Hold		<input type="checkbox"/>
3	Draft	Canceled, In Progress, Initial, On Hold		<input type="checkbox"/>
4	In Progress	Canceled, Closed, On Hold		<input type="checkbox"/>
5	Initial	Canceled, Draft, In Progress		<input type="checkbox"/>
6	On Hold	Canceled, In Progress		<input type="checkbox"/>

Possible Status Flows



Report Designer: Biannual report

Approval Is equal to

AND

End Date Between

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



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AQ Acentor
Raúl Moreno

AQ Acentor raised its capacity to manage real estate developments by 30% with ITM Platform

[Download Case Study](#) 



 **ITM Platform**
PROJECTS • PROGRAMS • PORTFOLIO

CAV Robotics
Daniel Díaz

We manage all our industrial robotics projects with ITM Platform

[Download Case Study](#) 



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umivale Activa
Juan Carlos Lombardía

With ITM Platform, Umivale Activa achieved seamless technology integration in the wake of a merger

[Download Case Study](#) 



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5B
Juan Carlos Zamora

5B has reduced business project planning deviations by 80% with ITM Platform

[Download Case Study](#) 

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