Introduction

For decision makers and their teams FLIGHTMAP is an indispensable support tool for managing their R&D and innovation portfolio. New in FLIGHTMAP release 5.0 is a *workflow engine* for automating the decision support process. This engine addresses the need of FLIGHTMAP users of being able to focus especially on the content of their portfolios, all in the interest of better decisions, and more value.

This engine supports processes such as:
- review and approval of project proposals and project phase gates,
- portfolio and budget preparation and approval,
- documented planning changes,
- periodic reporting,
- project start-up and resource assignment,
- exception handling at project and portfolio level,
- rolling forecasts.

The workflow capabilities are integrated with FLIGHTMAP's other decision support capabilities (presets, reports, data quality, and the extensive authorization scheme etc.).

Workflow Design

The workflow allows the orchestration of the portfolio decision making processes. It consists of a combination of manual tasks and automated tasks, which are organized in a workflow structure. FLIGHTMAP's *workflow engine* is set up with the following layered structure:

1. Workflow level

   In each portal different workflows can be defined. A workflow can be long-lived: e.g. it can stay active from the creation of a new project until its archive. Or workflows can be short: they get started when a certain property is set (e.g. an approval status), and they trigger a few tasks such as sending an email to the project team. Workflows can be defined for individual projects as well as for portfolios.

2. Node level

   Each workflow consists of a series of workflow steps represented by nodes. These nodes define the logic (the flow) of the workflow: which tasks should follow after each other, which tasks can be executed in parallel, and what happens next. When a project is approved, the next node may be sending an email with a project start-up report, which is different than if the project is rejected (in this case the project may be archived), or put on hold (in which case the project is scheduled for resubmission in a next approval round).

3. Task level

   For each node, one or more tasks define the actual required activity. Some tasks are performed automatically by FLIGHTMAP, some must be performed by the users and therefore show up in their task lists. Tasks can be started dependent on certain data quality indicators or on timing. These tasks are assigned at the right time to the right people, based on their roles in the process: e.g. portfolio managers receive a task notification for their portfolio review, and project managers receive one for updating their project data.

User interaction with tasks

All users in FLIGHTMAP have their own task list. This task list shows your own active tasks for the coming period. The duration of this period can be chosen in the user settings. Approval tasks can be directly performed from this task list. Tasks can have links to presets or files to support easy task completion. One can also delegate tasks in his task list to other FLIGHTMAP users.

Besides tasks automatically created by FLIGHTMAP via the workflow, tasks can also be created manually by a user. These tasks also appear in the task list of the person the tasks are assigned to. In case you are editing or watching the data of a project, the tasks for that project are shown in the task panel at the top of the screen. This way tasks can easily be accomplished in the right context.

To keep a user alert, the number of his open tasks is shown with an icon at the top of the screen. The underlying due dates can be fixed or calculated (e.g. within 5 days after submission, the confirmation task is due). Depending on the user settings, notifications of new pending tasks are sent automatically to the right user's email account. Workflows can be set up to send task results via email as well.

The execution of all tasks in the workflows is logged, so FLIGHTMAP builds an audit trail of who completed each task when. This can serve both for compliance as well as for process mining: analysing how long certain tasks take can offer good insights into improvement potential.

Workflow configuration

The workflow mechanism in FLIGHTMAP has been designed to align with the BPMN 2.0 standard for Business Process Model Notation[1]. FLIGHTMAP's tasks and decision nodes respectively represent activities and gateways in BPMN 2.0. Bicore recommends "Bizagi Modeler" tool for workflow modelling and capture. FLIGHTMAP's *workflow configuration editor* enables users to design their own tailor made workflow. Working with this editor requires advanced users who have completed the required training.
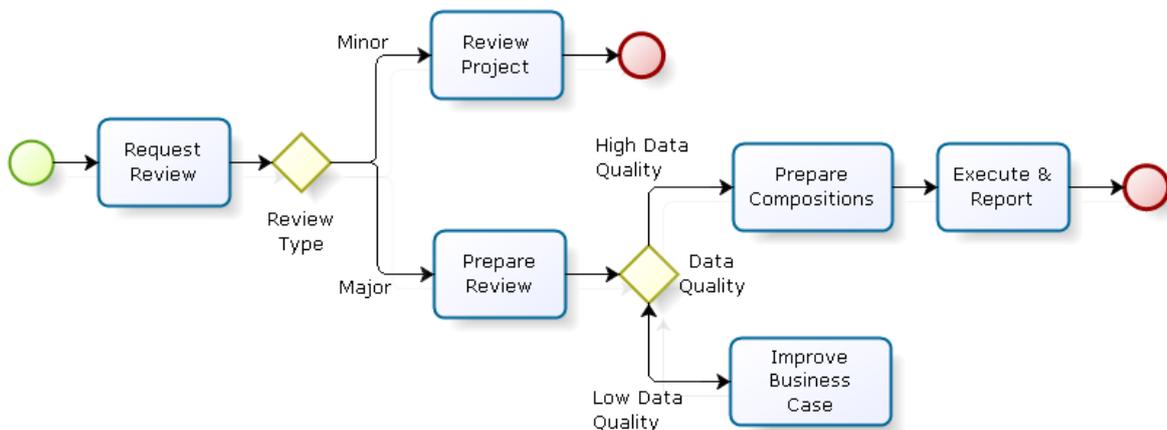
FLIGHTMAP has a smart mechanism for dealing with changes to a workflow: the default approach is to finish open tasks as they were defined previously, and then to continue in the updated workflow. If old workflows still need to be completed according to their old definitions, FLIGHTMAP also supports creating a new version or copy of the workflow for new cases. Users that make changes to a workflow get helpful feedback which parts of the workflow they are updating are active.

For the pricing of FLIGHTMAP's *workflow functionality* and other options: see the FLIGHTMAP price list.

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[1]See the Object Management Group's web site on BPMN: www.bpmn.org

Conclusion

With the FLIGHTMAP workflow capabilities, FLIGHTMAP moves the state of the art in portfolio management another step forward.

Decision makers and their teams can now focus on the content, because the process is taken care of. By further automating the way of working, both data and process quality improve to new levels of trust. This in turn contributes to better decisions, and more value.

For more information about FLIGHTMAP and the workflow capabilities, feel free to contact us.

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