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KANSAS CITY · 2024

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Action Item Responder (AIR)

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Agenda

- Problem Statement and AIR Overview

- Use Case Examples

- New Features

- Architecture and Security

- Solution Comparison
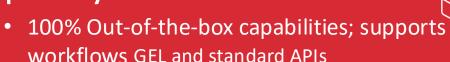
- Demonstration

Why this Solution?

- Clarity's workflow engine is one of the most powerful on the market, allowing all types of invested stakeholders the opportunity to participate directly in process-driven activities, reviews, and approvals.

- The stock solution that facilitates this interaction, however, is inefficient, rooted in the Classic UX, and requires licenses for each participant:
    1. Log into the system.
    2. Navigate to a workflow-generated action item.
    3. Click into the associated object to see its details.
    4. Return to the action item to finally provide an assessment.

- Solving this challenge was a top priority for Rego as a means to unlock the potential of Clarity's workflow engine, and why we have spent hundreds of hours researching for a simple way to respond directly within email to action items. This research has led to a solution that meets our high standards - simple, fast, and inexpensive.

- This service allows users to respond to actions simply and easily within their email - eliminating the extra login step while presenting all the information needed to make the decision within the body of the email. Some examples include:

Review/Approval/Rejection of Timesheets

Approval/Rejection of a Change Request or Budget Revision

Ideation Validation and Conversion Approval

Stage Gate Reviews

Overview

What You Can Do

- Create workflow process actions that route to anyone via email and allow those participants in the workflow processes to respond to action items simply and easily within email directly
- Notes can be added to the email response as well and are passed into Clarity

Compatibility

- 100% Out-of-the-box capabilities; supports workflows GEL and standard APIs
- On-premise and SaaS
- Any version of CA PPM 13.x and above

Value to Customers

- Increase adoption and perception; solution is simple and easy to use
- Reduce cycle time for responses

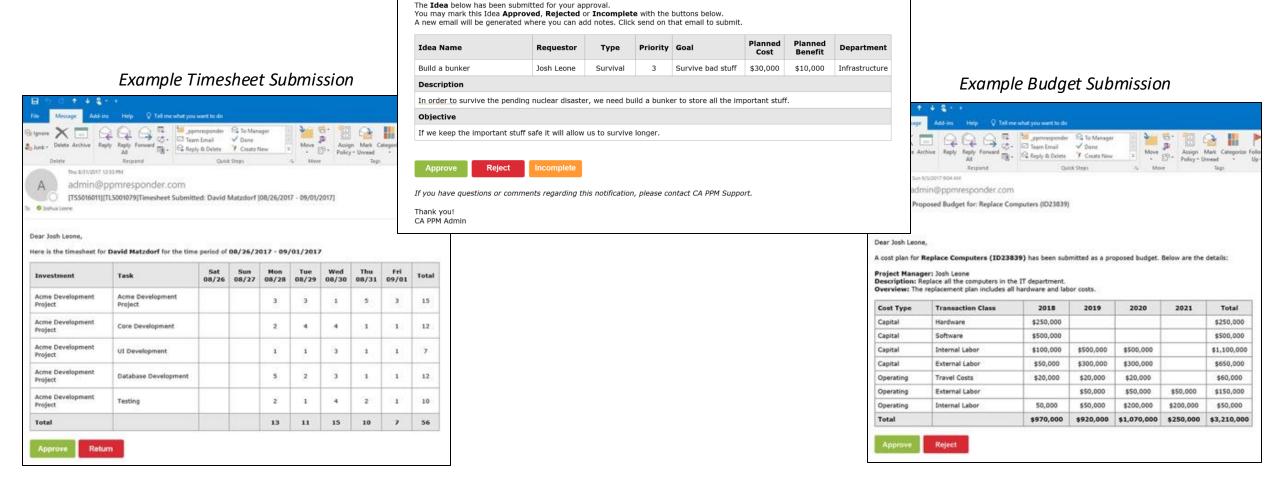## What You Get with Subscription

- Unlimited use in any workflow for any object; no restrictions
- Rego kick-off assistance; knowledge transfer and help creating your first workflow response

Examples

Example Idea Submission

Dear Leo Dsouza,

The **Idea** below has been submitted for your approval.
You may mark this Idea **Approved**, **Rejected** or **Incomplete** with the buttons below.
A new email will be generated where you can add notes. Click send on that email to submit.

Idea Name	Requestor	Type	Priority	Goal	Planned Cost	Planned Benefit	Department
Build a bunker	Josh Leone	Survival	3	Survive bad stuff	$30,000	$10,000	Infrastructure
Description							
In order to survive the pending nuclear disaster, we need build a bunker to store all the important stuff.							
Objective							
If we keep the important stuff safe it will allow us to survive longer.							

[Approve] [Reject] [Incomplete]

If you have questions or comments regarding this notification, please contact CA PPM Support.

Thank you!
CA PPM Admin

Example Timesheet Submission

Thu 8/31/2017 12:53 PM
admin@ppmresponder.com
[TS5016011][TL5001079]Timesheet Submitted: David Matzdorf [08/26/2017 - 09/01/2017]
To: Joshua Leone

Dear Josh Leone,

Here is the timesheet for **David Matzdorf** for the time period of 08/26/2017 - 09/01/2017

Investment	Task	Sat 08/26	Sun 08/27	Mon 08/28	Tue 08/29	Wed 08/30	Thu 08/31	Fri 09/01	Total
Acme Development Project	Acme Development Project			3	3	1	5	3	15
Acme Development Project	Core Development			2	4	4	1	1	12
Acme Development Project	UI Development			1	1	3	1	1	7
Acme Development Project	Database Development			5	2	3	1	1	12
Acme Development Project	Testing			2	1	4	2	1	10
Total				13	11	15	10	7	56

[Approve] [Return]

Example Budget Submission

Sun 9/1/2017 9:04 AM
admin@ppmresponder.com
Proposed Budget for: Replace Computers (ID23839)

Dear Josh Leone,

A cost plan for **Replace Computers (ID23839)** has been submitted as a proposed budget. Below are the details:

Project Manager: Josh Leone
Description: Replace all the computers in the IT department.
Overview: The replacement plan includes all hardware and labor costs.

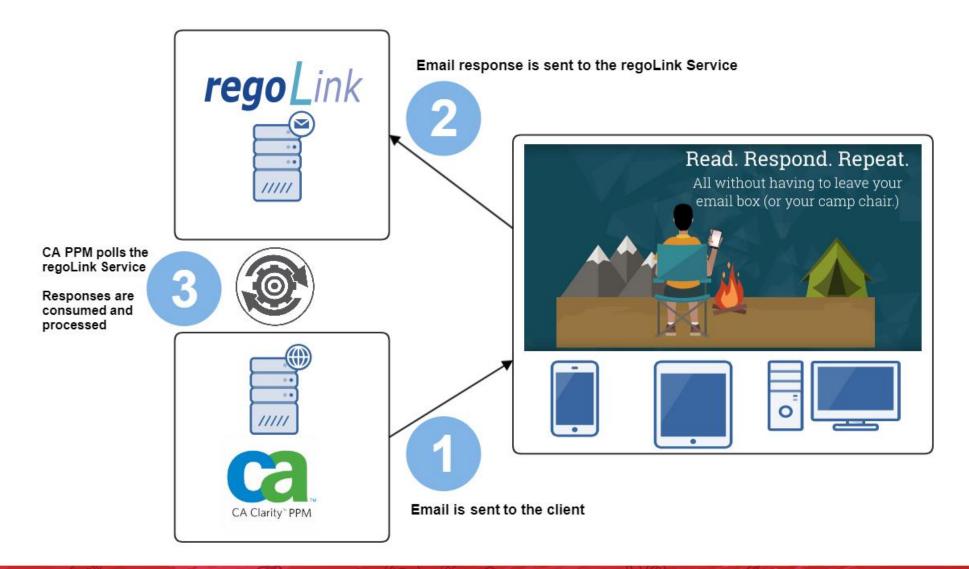| Cost Type	Transaction Class	2018	2019	2020	2021	Total
Capital	Hardware	$250,000				$250,000
Capital	Software	$500,000				$500,000
Capital	Internal Labor	$100,000	$500,000	$500,000		$1,100,000
Capital	External Labor	$50,000	$300,000	$300,000		$650,000
Operating	Travel Costs	$20,000	$20,000	$20,000		$60,000
Operating	External Labor		$50,000	$50,000	$50,000	$150,000
Operating	Internal Labor	50,000	$50,000	$200,000	$200,000	$50,000
Total		$970,000	$920,000	$1,070,000	$250,000	$3,210,000

[Approve] [Reject]

New Features

- Enhanced Flexibility
  - Template Functionality
  - Attachment, GEL, and SQL Parameters
  - Button Coloring
- Upgrade Simplification
- Localization
- Multiple Connection Instances
  - PROD, TEST, DEV
  - Token Management
- Security Group Override
- Upgraded Administrator Dashboard
  - Manually Resend Emails
  - Logger / Processor Object Maintenance

Architecture

regoLink

Email response is sent to the regoLink Service

2

CA PPM polls the regoLink Service

Responses are consumed and processed

3

1

CA Clarity™ PPM

Read. Respond. Repeat.
All without having to leave your email box (or your camp chair.)

Email is sent to the client

Security

- No customer data is sent via the email response or stored.
  - The only exception being the action item notes – if used.
- Email response contains only hashed IDs plus the response itself (e.g., Approved/Rejected).
- The service uses MS Azure and Office 365.
  - Authentication via OATH
  - Servers are in US-based data centers
  - Accounts are not shared; one account is dedicated per customer

Solution Comparisons

	Rego Action Item Responder	Native Action Responder	Mobile App (Rego or Native)
Timesheet Approvals	Yes	No	Yes
Process Action Item Approvals	Yes	Yes	Yes
Supports Notes	Yes	No	No
Email Formatting	Yes	No	No
Supported Mailbox Types	- IMAP/POP3 - Office 365 - Google Gmail - Rego Hosted Office 365	- IMAP/POP3 - Office 365 - Google Gmail	N/A
Error Handling and Logging	View all outbound and inbound entries	Limited visibility, runs in the background	N/A
Localization of messages	Yes	No	Yes
Select which Processes send an email	Yes	No	No
Send reminders for missed action items	Yes	No	No

AIR Demonstration

Sample Stage Gate Review Workflow

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Questions?

Elevate Your Professional Expertise with Rego University Certifications

Rego is excited to introduce our **new certification programs**, designed to enhance your expertise in Clarity administration, leadership, and technical skills. These certifications provide hands-on experience and knowledge to excel in your career.

Certification Requirements:

✓ **Completion**: 12 units per certification track

✓ **Eligibility**: Open to all Rego University attendees

Important Reminder:

To have your certification **credits tracked**, ensure you **complete the class surveys in the app** after each session. This step is critical for certification progress.

Surveys

Please take a few moments to fill out the class survey.
Your feedback is extremely important for future events.

Thank You For Attending Rego University

Instructions for PMI credits

- Access your account at pmi.org
- Click on **Certifications**
- Click on **Maintain My Certification**
- Click on **Visit CCR's** button under the **Report PDU's**
- Click on **Report PDU's**
- Click on **Course or Training**
- Class Provider = **Rego Consulting**
- Class Name = **regoUniversity**
- Course **Description**
- Date Started = **Today's Date**
- Date Completed = **Today's Date**
- Hours Completed = **1 PDU per hour of class time**
- Training classes = **Technical**
- Click on **I agree** and **Submit**

Let us know how we can improve!
Don't forget to fill out the class survey.

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