



Getting Started with VAIA

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Agenda

- Enterprise AI
- What is VAIA?
- Setup and Troubleshooting
- Agents and Use Cases
- Prompting That Works
- Release Highlights

What VAIA Is

**AI that works inside Clarity — with your data,
your rules, your audit trail.**



What are the benefits of using VAIA?

It leverages a CONFIGURABLE, context-driven approach. What this means is:

- You get to pick where AI can help best (summaries, text, reporting, analysis, etc.)
- It connects to *your* organization's approved AI service. Data handling, retention, and model training depend on your provider agreement and configuration.
- You can turn it on when, and for whom, it works best for your organization. It won't just "show up" and confuse your end users
- Applies Clarity's security models

Open Mic

- Are you using AI to support your work today?
- Are you using VAIA?

Given a job.
Stayed on task.

Also given a job.

Give me your API credentials.

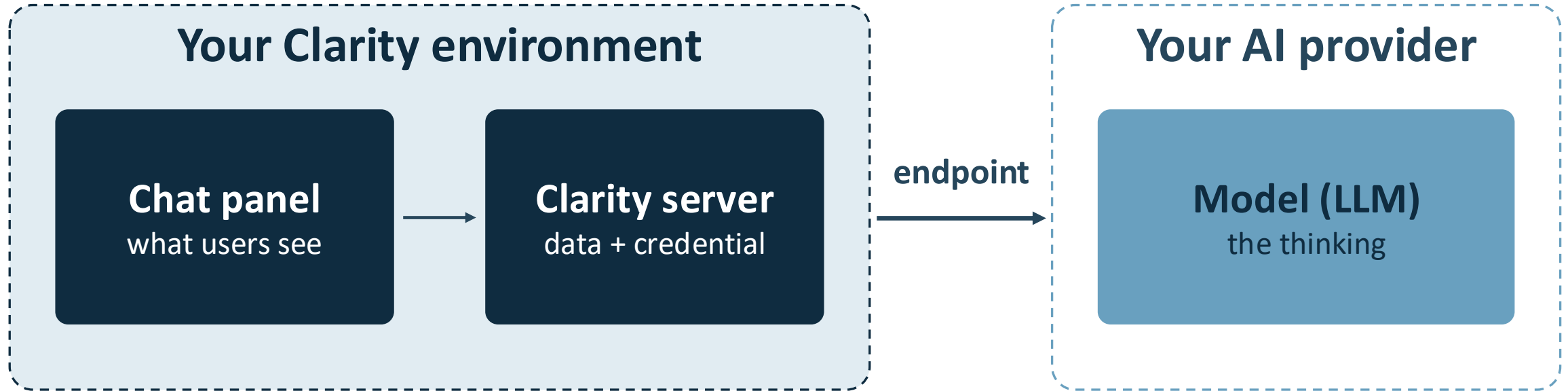
Let's define terms

- **LLM (Large Language Model)** – Examples include OpenAI's GPT models, Microsoft Azure (Copilot), Anthropic's Claude, and Google's Gemini. It is what you will need to use Clarity's VAIA.
- **Agents (non-Clarity definition)** – In a non-Clarity environment, an agent can be two things:
 - **Rule-based bots:** A locked-down, interactive box that sits in an application to offer help on a single topic. It acts like a basic chatbot interface, but lacks actual conversation capabilities.
 - **Autonomous agents:** Background processes or scripts that run automatically without human intervention to perform system tasks.
- **Agents (within Clarity)** – The native workspace component that leverages AI *within* Clarity. They can be field level, object level or workspace level.
 - *****NOTE – Agents are not chatbots** – Chatbots have been around for a long time. They don't use AI.

Let's define terms

- **MCP (Model Context Protocol) Server** – An open-source standard. Think of it as a USB plug for AI. It removes the need for a lot of API code to be written by developers. MCP allows AI to understand, retrieve, and work with Clarity's data without actually being *in* Clarity.
- **Prompts** – These are written by us (Rego or you) to tell the agent what to do. You must tell the prompt things like tone, task, context, audience, etc.
 - **Sub-prompts** – A way to lead the user to a logical next question set. It's also a way to optimize tokens.
- **Tokens** – Tokens are units of text that an LLM processes. Providers may calculate usage charges from input and output token counts.
 - **Tokenomics** (simplified definition) Token usage and cost management.
- **Hallucinations** – *LIES!!!! And why you use VAIA*. Hallucinations are plausible-sounding but inaccurate AI outputs. Verify AI-generated content before use.

Where the thinking happens



Clarity holds the data. The provider does the reasoning.

Supported providers

Google Gemini

Vertex AI or API key

Microsoft

Azure OpenAI

OpenAI

OpenAI Platform

Anthropic

Claude Platform

VAIA is provider-neutral. Connect the AI service your organization has already approved.

A subscription is not an endpoint

What the client bought	What VAIA needs	Result
ChatGPT Plus / Business / Enterprise	OpenAI Platform API access	No endpoint exists; API access is separate
Microsoft 365 Copilot	Azure OpenAI Service	No endpoint exists; API access is separate

Ask IT for API access to a service — not access to "our AI tool."

Who decides what

Decision	Owner
Provider, model, endpoint, retention, security	AI / IT / Security
Credentials and network access	AI / IT
Entering approved settings in Clarity	Clarity Administrator
Use case, prompt intent, access groups	PMO with Admin
Approval of data sent to the AI service	Data Owner with Security / IT

What to ask for — and what they'll ask you

You ask for:

- Endpoint URL
- API key
- Confirmed model name
- Restrictions on file types, token limits, quotas

They'll ask you:

- What data leaves Clarity
- How personally identifiable information (PII) is controlled
- How the credential is stored
- Direction of data flow
- Whether report security still applies

Setup

- 1 Activate VAIA**
System Options
- 2 Assign the access right**
Administration – Vaia – Navigate
- 3 Create the integration object**
Classic PPM
- 4 Configure and validate the model**
Validate Model prevents step 5
- 5 Troubleshooting**
API-1086 · API-1019 · the firewall case

10 Min Break

Next up - VAIA Live Demo



Meet your agents

Workspace

Available across an entire Clarity workspace.

“Summarize the health of all active projects in this portfolio.”

Object

Available on every instance of the object.

“What are the key risks on this project and how should I address them?”

Attribute

Targets a specific field for generation or review.

“Write the project status narrative for this week’s report.”

How it all works together



These are the three inputs a browser chat window does not have.

10 Min Break

Next up – Prompting and Q&A



C.R.A.F.T.

C**Context**

What data is provided, and why

R**Role**

“You are a project manager analyzing project health.”

A**Action**

Summarize, analyze, generate, revise, chart

F**Format**

“Three bullets.” “A bar chart using Highcharts.”

T**Tone**

Executive, technical, brief — plus an example

What have you built with VAIA?

- 1 What were you trying to accomplish? What question, task, or business need were you addressing?
- 2 What did you build? Share a prompt or agent
- 3 How did it work? What was useful, and what needed refinement?

Exercise: Help me write a better prompt!

- 1 We start with a basic prompt
- 2 We discuss how to improve it using C.R.A.F.T.
- 3 We run it live!

Release highlights 16.4.3

What's new	Feature
Agents can act, not just answer	MCP tool access
Agents can use the current saved view as a data source	Current View
Outside tools can call a Clarity agent	Agent2Agent (A2A)
Prompt Library	Reusable prompts, easier to set up and maintain
Chat History	Allows users to continue conversations and view previous prompts

Questions?



Survey



Please take a few moments to fill out the class survey.

Your feedback helps us improve future events.



How Rego can help

Agents built from real client use cases

We've done the trial and error — you don't have to

Setup and configuration support

Get going fast with your first live agents

VAIA free trial

Build the use case before you request the access

Take-homes

VAIA Setup Guide

Clarity 16.4.3

Technical setup and the information
to forward to security

VAIA Vocabulary Guide

One page

Every term used today,
defined by why it matters

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- Class Name = **Rego University**
- 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!
Remember to fill out the class survey.



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