



RegoLink | Action Item Responder (AIR)

Your Guides:

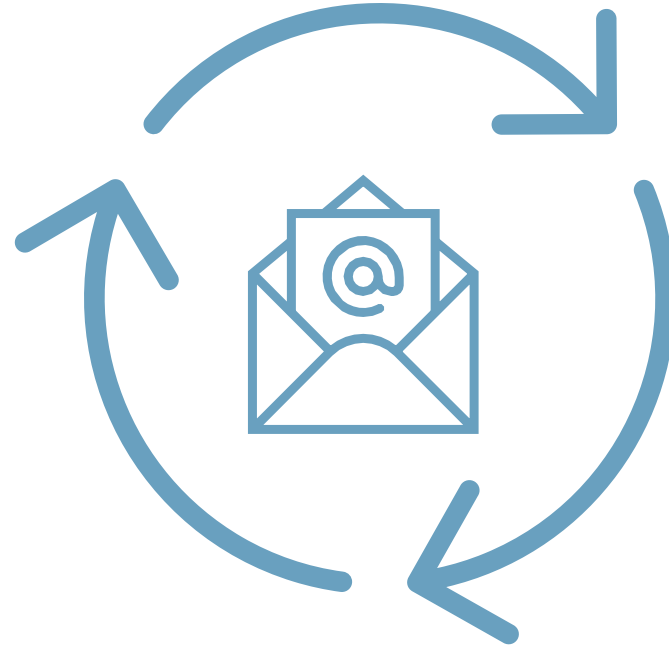
Josh Leone and Wes McCoubrie



Agenda

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- Why AIR?
- Solution Overview
- Use Case Examples
- Architecture & Security
- 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



Ideation Validation and Conversion Approval



Approval/Rejection of a Change Request or Budget Revision



Stage Gate Reviews

What You Can Do



- Create workflow process actions that route to anyone via email, embedded with all necessary contextual details and attachments.
- Allow those participants in the workflow processes to respond to action items simply and easily within email directly.
- Add notes to the response that are passed back to Clarity along with the outcome.

Limitations = NONE



- 100% out-of-the-box capabilities, leveraging workflows with GEL and standard APIs
- On-Premise and On-Demand (GCP, AWS)
- Any supported version of Clarity

Value to Customers



- Improve adoption & perception; simple and easy to use.
- Reduce cycle time; responses can be provided anywhere / anytime.

What You Get with Subscription



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

Email Examples

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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.

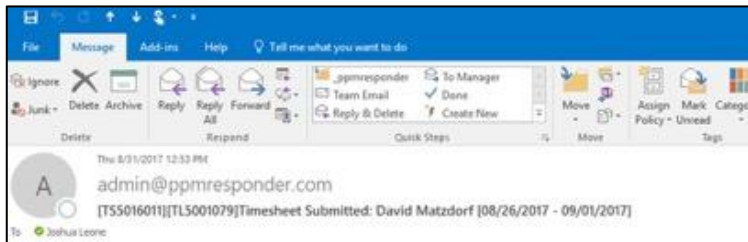
Idea Name	Requestor	Type	Priority	Goal	Planned Cost	Planned Benefit	Department
Build a bunker	Josh Leone	Survival	3	Survive bad stuff	\$30,000	\$10,000	Infrastructure
Description							
In order to survive the pending nuclear disaster, we need build a bunker to store all the important stuff.							
Objective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



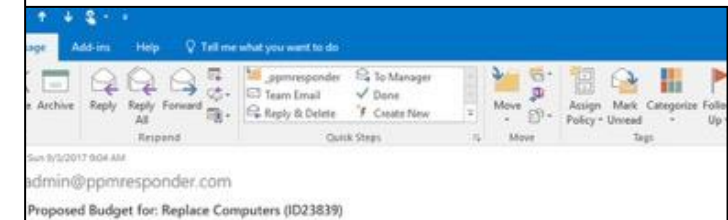
Dear Josh Leone,

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



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

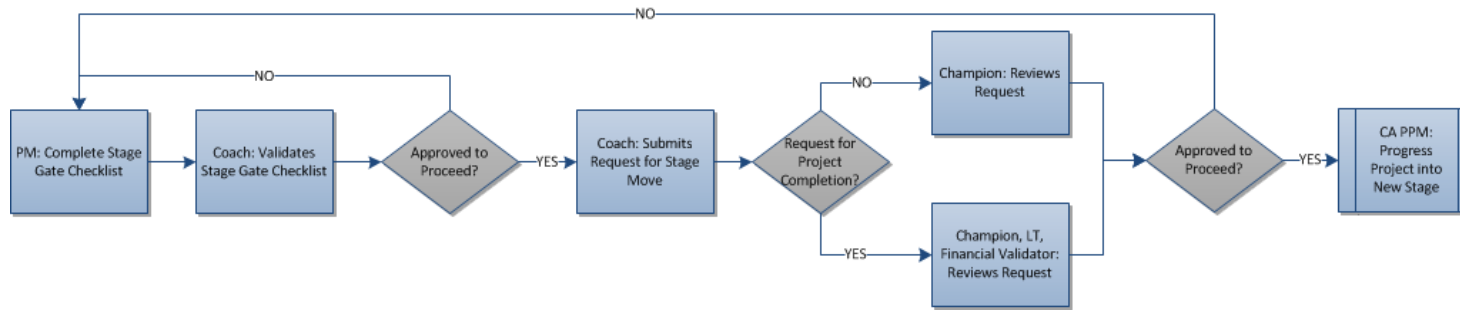
Description: Replace all the computers in the IT department.

Overview: The replacement plan includes all hardware and labor costs.

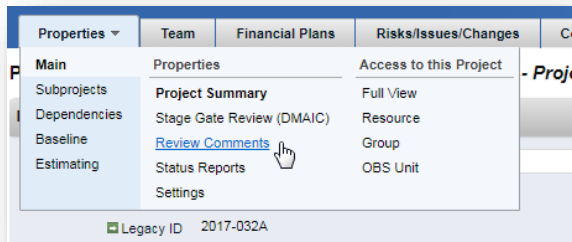
Cost Type	Transaction Class	2018	2019	2020	2021	Total
Capital	Hardware	\$250,000				\$250,000
Capital	Software	\$500,000				\$500,000
Capital	Internal Labor	\$100,000	\$500,000	\$500,000		\$1,100,000
Capital	External Labor	\$50,000	\$300,000	\$300,000		\$650,000
Operating	Travel Costs	\$20,000	\$20,000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

[Approve](#) [Reject](#)

Stage Gating Use Case (Real-World Example)



- Stage move approvals for the projects' Champions are facilitated with an AIR email that includes details about the current stage and embedded approve / reject buttons.
- Upon clicking the appropriate button, the Champion can provide comments in the response email. These comments are tracked on the Review Comments subpage of a project:



- Note that scheduled background jobs monitor for and process inbound and outbound message. These jobs run every five minutes.

Stage Move Requested (Define to Measure): Contractor Schedule Optimization

wes.mccoubrie@regoconsulting.com

Fri 6/15/2018 10:50 AM

To: Wes McCoubrie <wes.mccoubrie@regoconsulting.com>;

Contractor Schedule Optimization (PRJ000379) has been submitted as a candidate to move into the **Measure** stage and requires your review.

PM: Champion Sample
Coach: Champion Sample

What's wrong? What do you want to achieve?
These are my comments as Project Leader.

How does the problem affect the customer?
These are my comments as Project Leader.

Which part of the process relates to the problem?
These are my comments as Project Leader.

Is the Stakeholder Analysis and Communication Plan completed?
These are my comments as Project Leader.

Location of the computer project files?
These are my comments as Project Leader.

Is Accountant aligned with Charter Savings?
These are my comments as Project Leader.

What are the project's KPOVs (Y)?
These are my comments as Project Leader.

Does the project have the appropriate buy-in to succeed?
These are my comments as Project Leader.

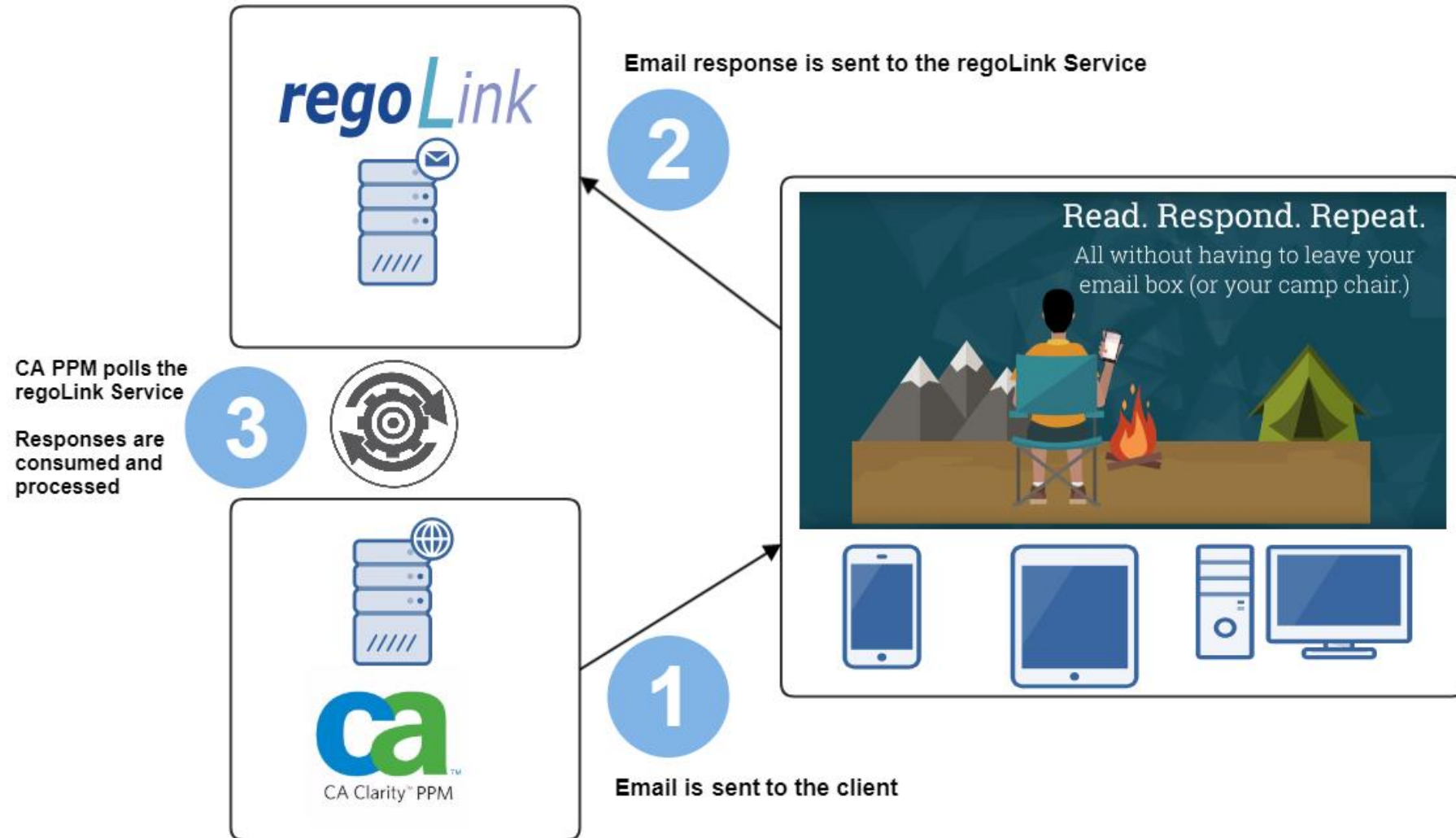
Tools Used (Please List)
These are my comments as Project Leader.

Please provide your approval or rejection directly within this action item.

Approve

Reject

Architecture



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 for the response backplane.
 - Authentication via OATH (no user/pass is ever transmitted)
 - Servers are in US-based data centers
 - Accounts are not shared; one account is dedicated per customer

AIR Demonstration

Sample Stage Gate Review Workflow



Let Rego be your guide.

Questions?



Let Rego be your guide.

Thank You For Attending regoUniversity

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 Name = **regoUniversity**
- Course Number = **Session Number**
- 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.



Phone

888.813.0444



Email

info@regouniversity.com



Website

www.regouniversity.com