

Celonis Process Copilot user guide

Overview

Process Copilot is an AI-enhanced feature within the Celonis process and data mining platform.

- Copilot allows for conversational interaction with your data, asking questions, building graphs, looking for insights or viewing process flows.
- Copilot uses advanced analytics and artificial intelligence; users can analyze data by asking natural language questions or using predefined prompts to get responses in a variety of formats.

Procedure

- **Step 1.** How to access your Copilot:
 - A. Use the website <u>URL</u> to connect to the State of Oklahoma Procurement Process Copilot to access configured data groups.
 - i. From the Apps page, select the Suggested package, **Procurement Control Tower**, to access the Process Copilot (Figure 1).

Suggested packages		
Procurement Control Tow	er	
liewed 4 days ago (③ Procurement		
All spaces (1)		

Figure 1. Procurement Copilot.

ii. The Process Copilot displays, with available options and metrics (Figure 2).

Welcome to	Process Copil	ot, t.lata@cel	onis.com! Deta	
How can I assist	with improving your p	rocesses and identif	ying opportunities?	
I have been configured with access to a	a specific Dataset, whi	ch enables me to an	swer as quickly and precise	ly as possi
To get starte	d, here are some relev	vant Metrics and san	nple questions.	
Metrics				
# Flagged PO Lines ①	Flagged PO Value		Fully Resolved PO Value	
31,184	\$6.09B		\$5.83B	
Number of flagged PO items/the count of flagged purchase order lines	Total value of flagged	I PO Lines	The total value of PO lines the flagged and are now resolved	at were d.
Give me an overview of all PO lines	→	What is the most c	ommon flag for OMES?	-
How many POs are Incorrect PO Type and/o	r Origin? →	Show me what Pro-	cess Copilot can do	÷

Figure 2. Process Copilot.

Step 2. How to use your Copilot.

- **A.** Copilot can be used for questions related to flagged Purchase Orders. The entry screen has been configured to give you an overview of what's possible with this Copilot.
 - i. Selecting the **Dataset** hyperlink provides an overview of all data this Copilot can access.
 - **a.** KPIs related to flagged purchase orders and data dimensions that can be used to further slice and dice the data (e.g., agency, buyer, flag reason, etc.).
 - **b.** In addition, Copilot shows three KPIs relevant to the use case and example questions that can be used.
 - **ii.** Review the Dataset reference before starting to use Copilot. Copilot cannot answer questions about information outside this dataset.
- **B.** Once you select or type a question, the Copilot retrieves answers using validated and available data in Celonis (Figure 3). Some useful question examples:
 - a. What is OMES? You can ask Copilot a question about any other agency (e.g., What is agency XXXX?).

What is OMES?)							
OMES stands for the Office of Management and Enterprise Services. It is a central agency in the State of Oklahoma responsible for providing various administrative and support services to other state agencies, including procurement, financial management, and information technology services.								
Would you like to see specific KPIs or data related to OMES? If so, please specify what you are looking for.								
R Inspect this response ゆ ろ								
Figure 3. Sample Question and Response.								

- **b.** How many flagged PO lines are there for Agency XXXX?
- **c.** Within Agency XXXX, how many POs are flagged for Incorrect PO Type and/or Origin by buyer?
- **d.** Give me an overview of all PO lines for the buyer XXXX that are flagged for Incorrect PO Type and/or Origin.
- **Step 3.** Copilot general information.
 - **A.** Copilot understands that the fiscal year for the State of Oklahoma runs from June 30th to July 1st of the prior year.
 - **B.** Copilot is configured to focus on purchase order lines, even when users might only ask for purchase orders.
 - C. General tips.
 - i. Always inspect the answers to double-check the filters and calculation steps.
 - ii. Use the 👍 🁎 thumbs up, thumbs down icons to provide feedback on the answers.
 - iii. If Copilot can't answer certain questions needed or you are experiencing any issues, please contact <u>omes.rac@omes.ok.gov</u> so they can review and improve the configuration.