

# 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 [URL](#) 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).

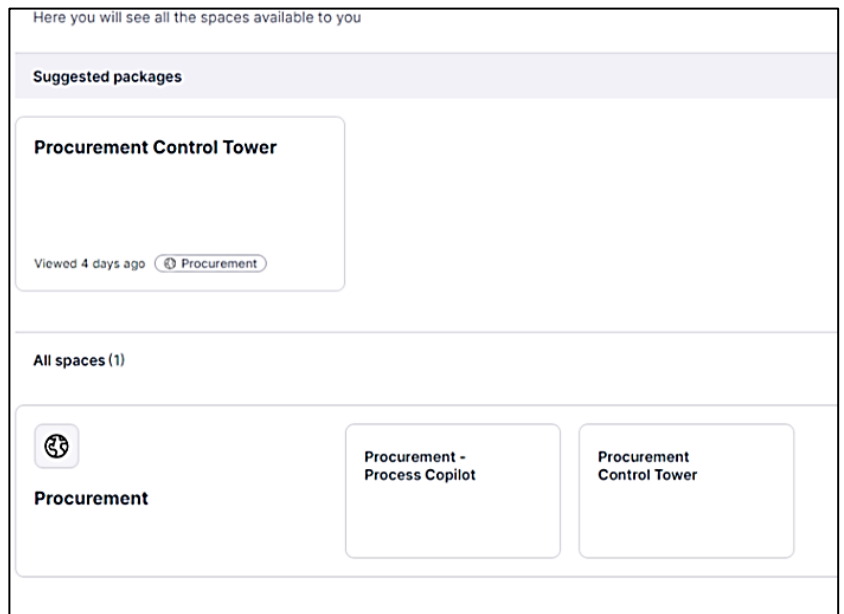


Figure 1. Procurement Copilot.

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

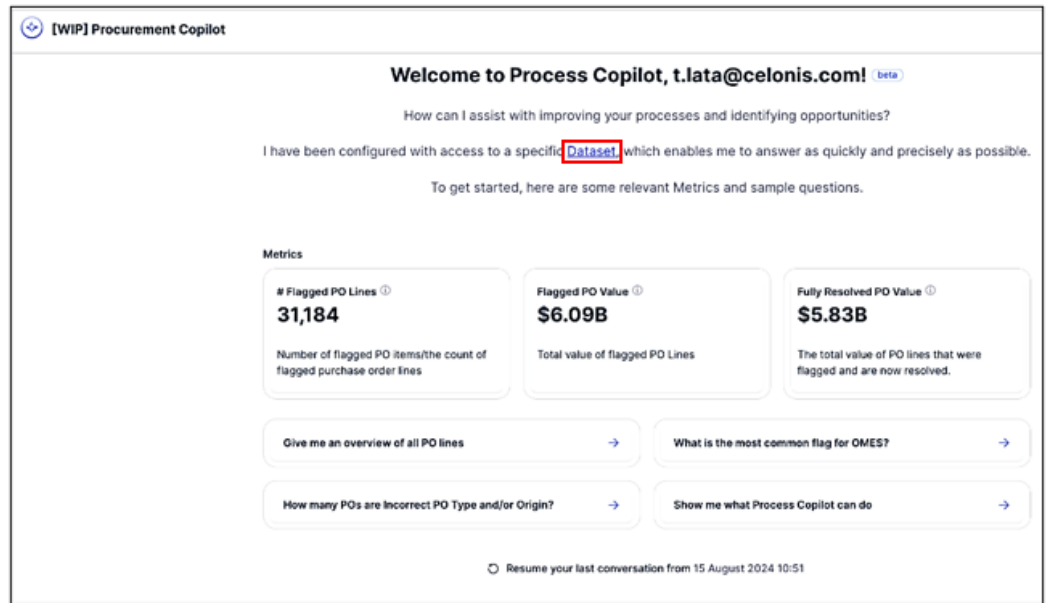


Figure 2. Process Copilot.

**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?).

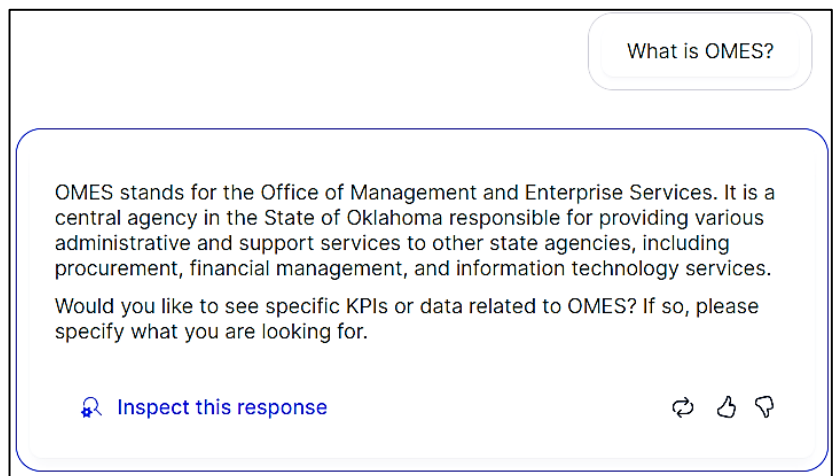


Figure 3. Sample Question and Response.

- 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 [omes.rac@omes.ok.gov](mailto:omes.rac@omes.ok.gov) so they can review and improve the configuration.