

# Celonis Procurement Process Copilot user guide

## Overview

This user guide provides tips for using Celonis Procurement Process Copilot.

Procurement Process Copilot is designed for researching your agency's procurement activities. It allows you to find answers to questions regarding POs, vouchers, and contract IDs attached to PO lines created by your state agency.

## Keywords (Table 1).

Keyword	Descriptions
<b>Spend</b>	Total voucher amount
<b>Encumbrance/encumbered</b>	PO
<b>Flag</b>	Celonis flag criteria: <ul style="list-style-type: none"> <li>• Authority order.</li> <li>• Direct PO.</li> <li>• IT authority order.</li> <li>• IT contract release.</li> <li>• Incorrect PO type and/or origin.</li> <li>• Non-IT contract release.</li> <li>• Overdue PO approval.</li> <li>• P-Card authority order.</li> <li>• Sole source.</li> <li>• Statewide contract.</li> </ul>
<b>Agency</b>	Name of agency or agency #
<b>Supplier/vendor</b>	Vendor " "
<b>Contract ID</b>	SW# or 000000000000000000XXXX
<b>PO number #</b>	Unique identifier
<b>Voucher #</b>	Unique identifier
<b>Category code</b>	Category code
<b>Fiscal year</b>	FYXX
<b>Calendar year</b>	Year XXXX
<b>Bud ref</b>	Budget reference year in PeopleSoft

Table 1. Keywords and Descriptions.

## Example questions (Table 2).

Type	Example question
<b>Spend</b>	<ul style="list-style-type: none"> <li>What vouchers were paid against POXXXXXX?</li> <li>How much has our agency spent with vendor XXXX in FY25?</li> <li>What is the total spend for vouchers made out to Supplier XXXX in FY24?</li> <li>What is the count of POs that buyer <b>**PeopleSoft User ID**</b> created to Supplier XXXX in August 2024?</li> <li>What vendors has my agency spent the most on in FY25?</li> <li>What was the most recent voucher paid by <b>**AGENCY**</b>?</li> <li>Give me a list of all vouchers paid by <b>**AGENCY**</b> last week.</li> <li>How much <b>**Agency**</b> spend was Sole Source for FY24?</li> <li>How much did <b>**Agency**</b> spend with vendor XXXX for bud ref 25?</li> <li>Give me a list of POs <b>**Agency**</b> has done for bud ref 25.</li> </ul>
<b>Contract search</b>	<ul style="list-style-type: none"> <li>What is the Contract ID for Category Code XXXX?</li> <li>What is the current contract ID for the category description, computer?</li> </ul>
<b>Category code</b>	<ul style="list-style-type: none"> <li>What is the category code for business cards?</li> <li>What is the category description for category code XXXX?</li> </ul>
<b>Flags</b>	<ul style="list-style-type: none"> <li>What POs for our agency were flagged for Direct PO in FY24?</li> <li>How many incorrect PO Type and/or Origin PO flags did <b>**Agency**</b> receive in FY25?</li> </ul>

Table 2. Example Questions by Category.

## Procurement Process Copilot tips.

- When starting a conversation with Procurement Process Copilot, clarify who “my agency” is referring to.
  - Procurement Process Copilot will ask which agency you are referring to.
  - Type in your business unit number or agency name.
  - Copilot will remember this fact for the remainder of the session.
- Including descriptive words before numbers will help Procurement Process Copilot better distinguish what the numbers mean (ex. “voucher XXXXX”, “requisition ID XXXXXXXX”).
- Some answers will provide a small table.
  - To view more details, select **View Expanded Table** (Figure 1).



Figure 1. View Expanded Table.

- This table can also be exported to Excel by clicking the export box in the top right corner (Figure 2).

Flag Reason	# Flagged PO Lines
Incorrect PO Type and/or Origin	40
IT Contract Release	10
Statewide Contract	9
Non-IT Contract Release	7
Direct PO	0
-	0

Figure 2. Expanded Table.

- Procurement Process Copilot keeps track of conversation when prompting it for answers.
  - Select the **Start a new conversation** icon in the upper right-hand corner if you are not receiving answers (Figure 3).

The screenshot shows the Procurement Process Copilot interface. At the top, there's a header with the title "Procurement Process Copilot CopyVoucherData" and a button "Enhance Accuracy (9 improvements)". Below the header, a welcome message says "Welcome to Process Copilot, Jennifer S Smith" with a "Preview" link. A message follows: "I have been configured with access to a specific Dataset, which enables me to answer as quickly and precisely as possible. To get started, here are some relevant Metrics and sample questions." Below this, there are three metric cards: "# Flagged PO Lines" with a value of 34,836, "Flagged PO Line Value" with a value of \$6.97B, and "Fully Resolved PO Line Value" with a value of \$6.84B. Each card has a brief description. At the bottom, there are three buttons with sample questions: "Give me an overview of all PO lines", "What is the most common flag for OMES?", and "How many POs are Incorrect PO Type and/or Origin?".

Figure 3. Start a New Conversation.

- Load previous Procurement Process Copilot conversations by selecting the **Chat History** button (Figure 4).

This screenshot shows the same Procurement Process Copilot interface as Figure 3, but with the "Chat History" sidebar open on the right. The sidebar has a "Chat History" header with a close button (X). Below it, there's a "Today" section with a dropdown arrow. Under "Today", there's a message "How many flags does OMES have fo..." with a "Current" button. Below that, there's an "Older" section with a dropdown arrow. At the bottom of the sidebar, there's a note: "Chat history only shows your last 100 conversations." The main content area remains the same as in Figure 3.

Figure 4. Chat History.

5. Note, Key Performance Indicator (KPI) is a quantifiable measure used to evaluate the success of an organization, employee, or process in meeting objectives for performance.
- KPIs help organizations understand how well they are performing in relation to their strategic goals and objectives.
  - They can be used to track progress, identify areas for improvement, and make informed decisions.
  - In the context of procurement, KPIs might include metrics such as the number of flagged purchase orders, the total value of purchases, or the efficiency of the purchasing process (Figure 5).

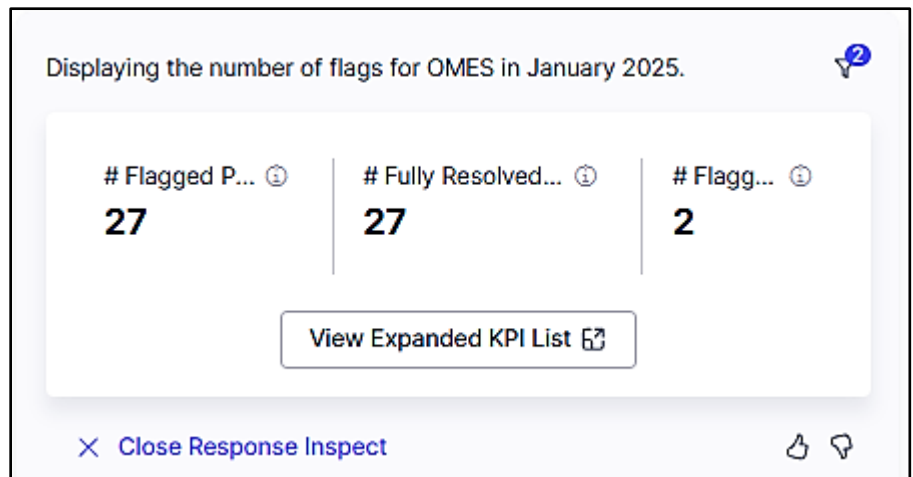


Figure 5. KPI Metrics.

6. Reference the [OMES Celonis Training](#) videos in Workday for additional information.