Celonis Contracts Copilot user guide

Overview

This user guide provides tips for using Celonis Contracts Copilot.

Celonis Contracts Copilot is a tool for researching information related to statewide and agency contracts. It allows you to find answers to questions regarding contract IDs, category codes, category descriptions, vendors, Central Purchasing point of contact and contract start and expiration dates. Unlike Procurement Process Copilot, Contracts Copilot provides only information on statewide and agency contract data. This allows you to explore information regarding contracts that may be available for your agency's use.

Keywords (Table 1).

Keyword	Description
Supplier/vendor	Vendor " "
Contract ID	SW# or 00000000000000000XXXX
Contract status	Active vs. expired contracts
Contract begin date	Date contract begins
Contract expire date	Date contract ends
Category code	Category code
Category code description	Category code description
Contract type	Statewide contract or agency specific contract
Fiscal year	FYXX
Calendar year	Year XXXX
Point of contact	CP Buyer on the contract.

Table 1. Keywords.

Contract search example questions:

- What is the contract ID for category code XXXX?
- What is the category code for coffee?
- What is the current contract ID for the category description computer?
- What are the active contract IDs for vendor XXXX?
- IS contract ID XXXX an agency or statewide contract?
- What are the contract start and end dates for contract ID XXXX?
- Who is the point of contact for the statewide contract for category description XXXX?

Copilot tips.

- Including descriptive words before numbers helps Copilot better understand and interpret the meaning of the numbers (ex. "contract ID XXXX", "category code XXXXXXXX").
- Some data requests will return a small table.
- This table can be exported to Excel by clicking the box in the top right corner.

Example.

Step 1: Adding attributes to a table.

Step 2: Submit the question: ""What is the **contract ID** for **category code** 72154013?".

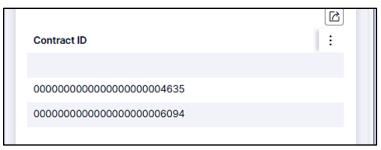   **A.** Celonis Contracts Copilot displays a result (Figure 1).

Figure 1. Sample Results.

Step 3: Refining the results.

    A. If the table provided does not contain all the necessary information, refine the results:
        i. Ask Copilot to add attributes to the table.
        ii. For example, you may want to know which of the contract IDs in the Figure 1. Sample Result. are still active and which vendor is associated with each.
        iii. By asking Copilot to add expiration dates and supplier names to the table, you will receive the Figure 2. Refined Results.

Figure 2. Refined Results.

    B. Now the originally returned table has the additional information.

Step 4: Reference the OMES Celonis Training videos in Workday for additional information.