

# celonis

Amazing insights. Better results.

## Introducing Celonis Process Mining

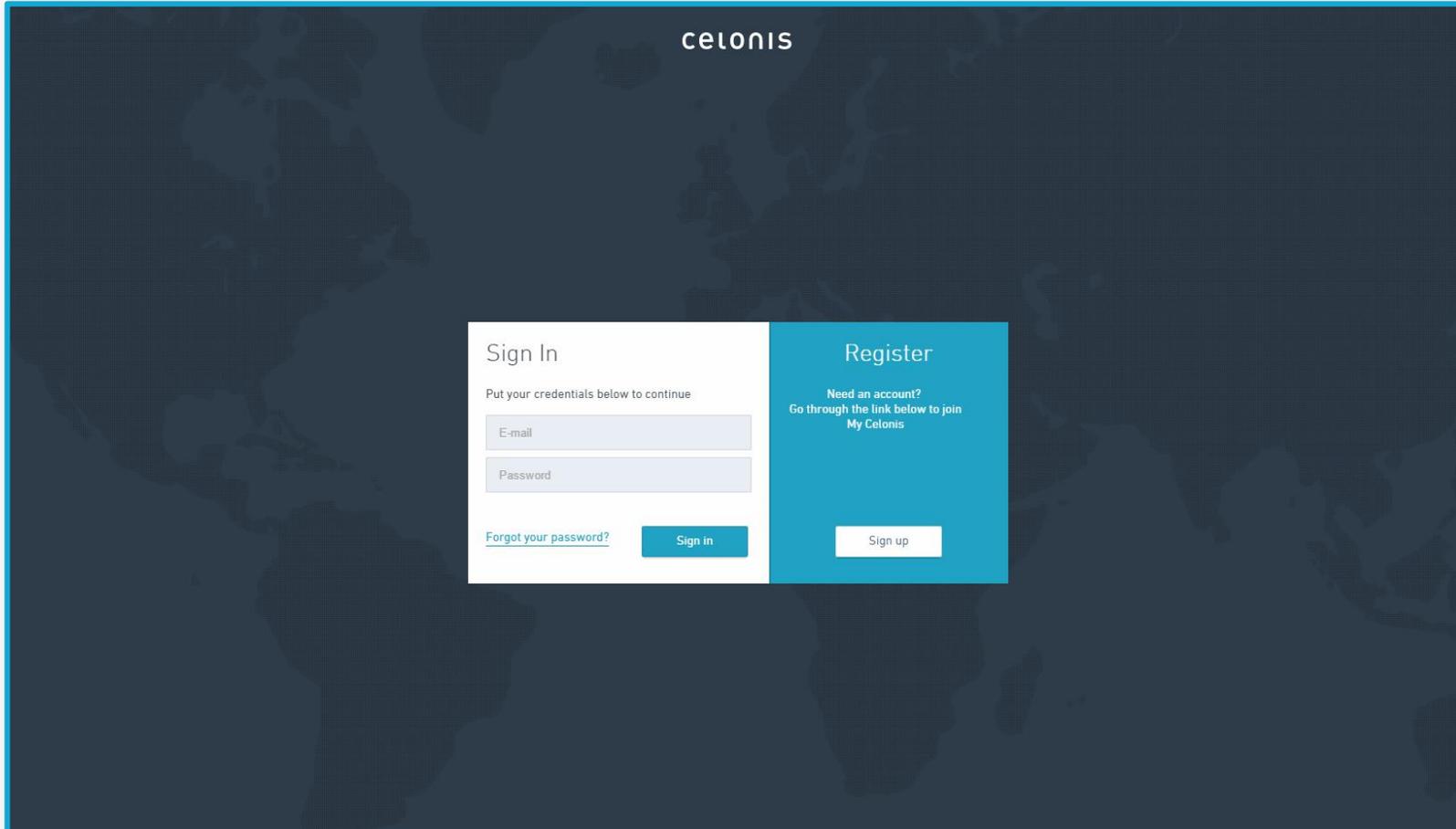
Celonis4 Tutorial



[www.celonis.de](http://www.celonis.de)



# Installation (Enterprise)

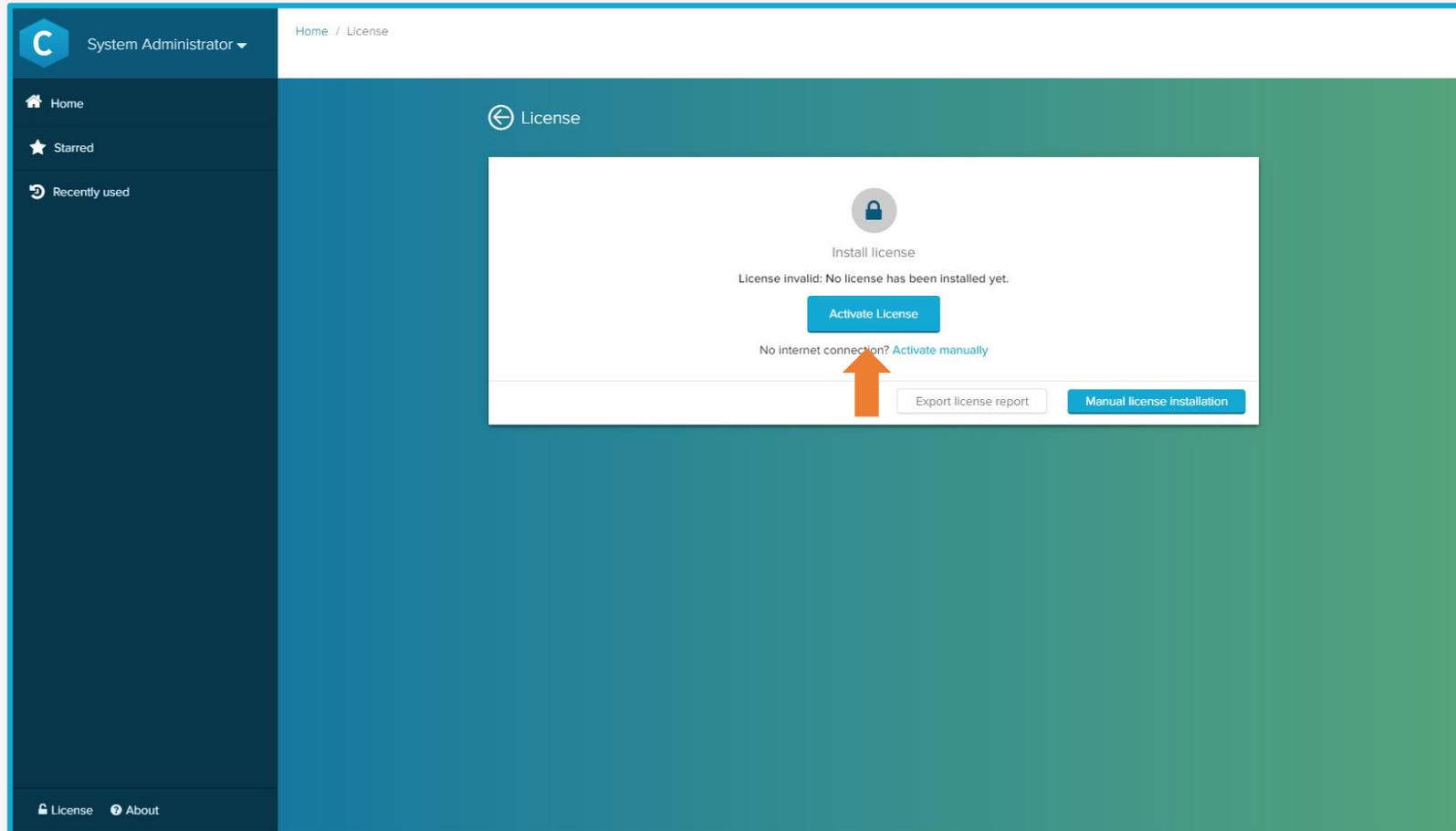


The screenshot shows the Celonis login and registration interface. At the top center, the word "celonis" is displayed in a light blue font. Below it, there are two main sections: "Sign In" on the left and "Register" on the right. The "Sign In" section has a white background and contains the text "Put your credentials below to continue" above two input fields for "E-mail" and "Password". Below these fields are a link for "Forgot your password?" and a blue "Sign in" button. The "Register" section has a blue background and contains the text "Need an account? Go through the link below to join My Celonis" above a white "Sign up" button.

Go to [my.celonis.de](https://my.celonis.de):

- ✓ Sign in to MyCelonis
- ✓ Go to the 'Downloads' section ([my.celonis.de/downloads](https://my.celonis.de/downloads))
- ✓ Choose between the Cutting Edge and the Stable Version
- ✓ Run the setup file and follow the instructions
- ✓ Choose the directory where you want to install Celonis4

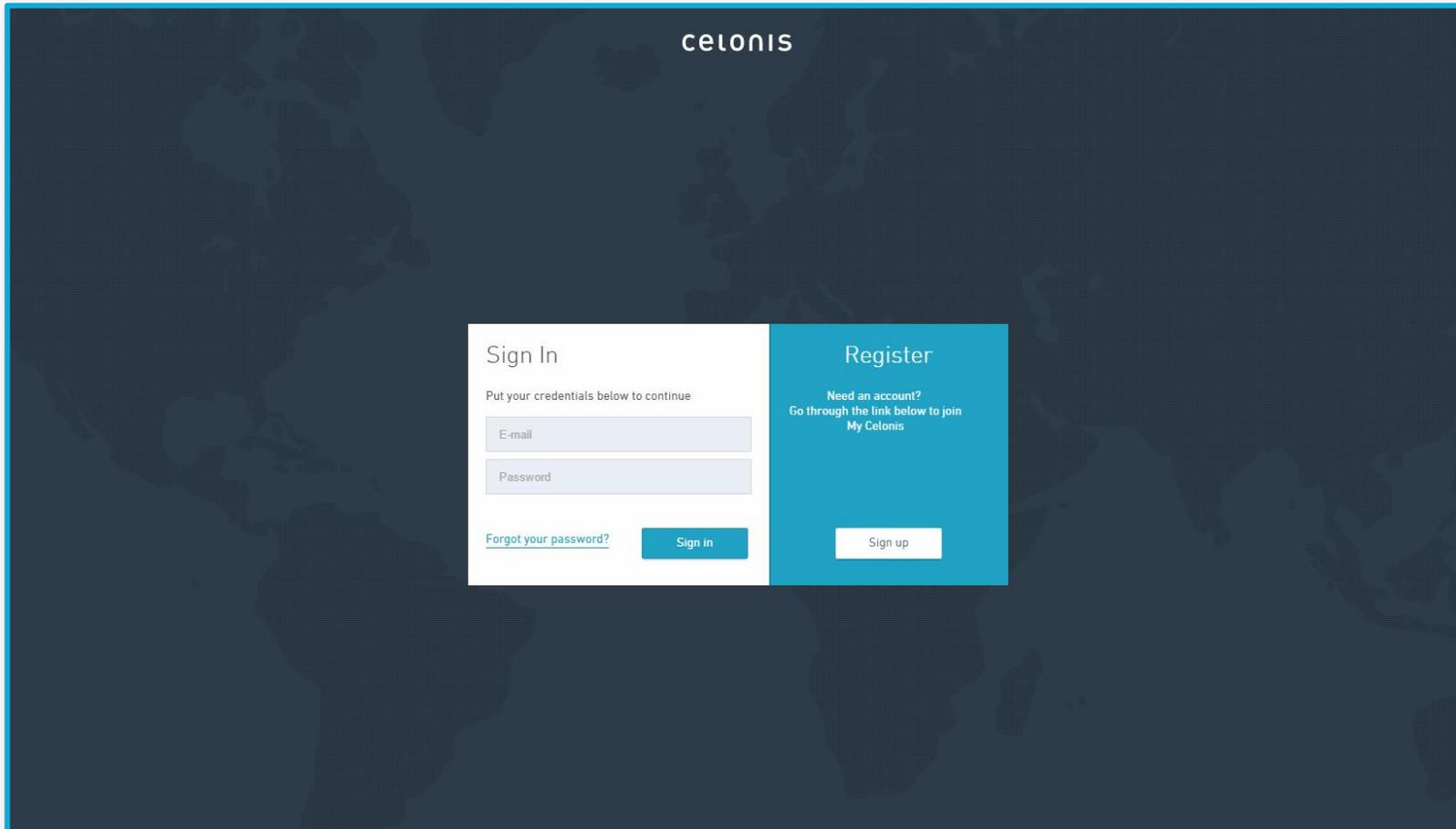
# Installation (Enterprise)



## Activate License:

- ✓ Start Celonis4 (Desktop-Shortcut) and click on the ,Start'-Button in Celonis4
- ✓ Open your browser and type ,localhost: <Port>' into the address bar, with <Port> being the port you have chosen during the installation (or 9000, if you have not chosen any)
- ✓ Log in at the appearing log-in screen with the user name and password you have chosen during the installation (,sysadmin' and ,\$admin!', if you have not chosen any)
- ✓ Click on ,Activate license'
- ✓ The license should be activated automatically now

## Installation (Single User)



The screenshot shows the Celonis login and registration interface. The background is dark blue with the Celonis logo at the top center. In the foreground, there are two panels: a white 'Sign In' panel on the left and a blue 'Register' panel on the right. The 'Sign In' panel contains a heading, a sub-heading, two input fields for 'E-mail' and 'Password', a 'Forgot your password?' link, and a 'Sign in' button. The 'Register' panel contains a heading, a sub-heading, and a 'Sign up' button.

celonis

**Sign In**

Put your credentials below to continue

E-mail

Password

[Forgot your password?](#) **Sign in**

**Register**

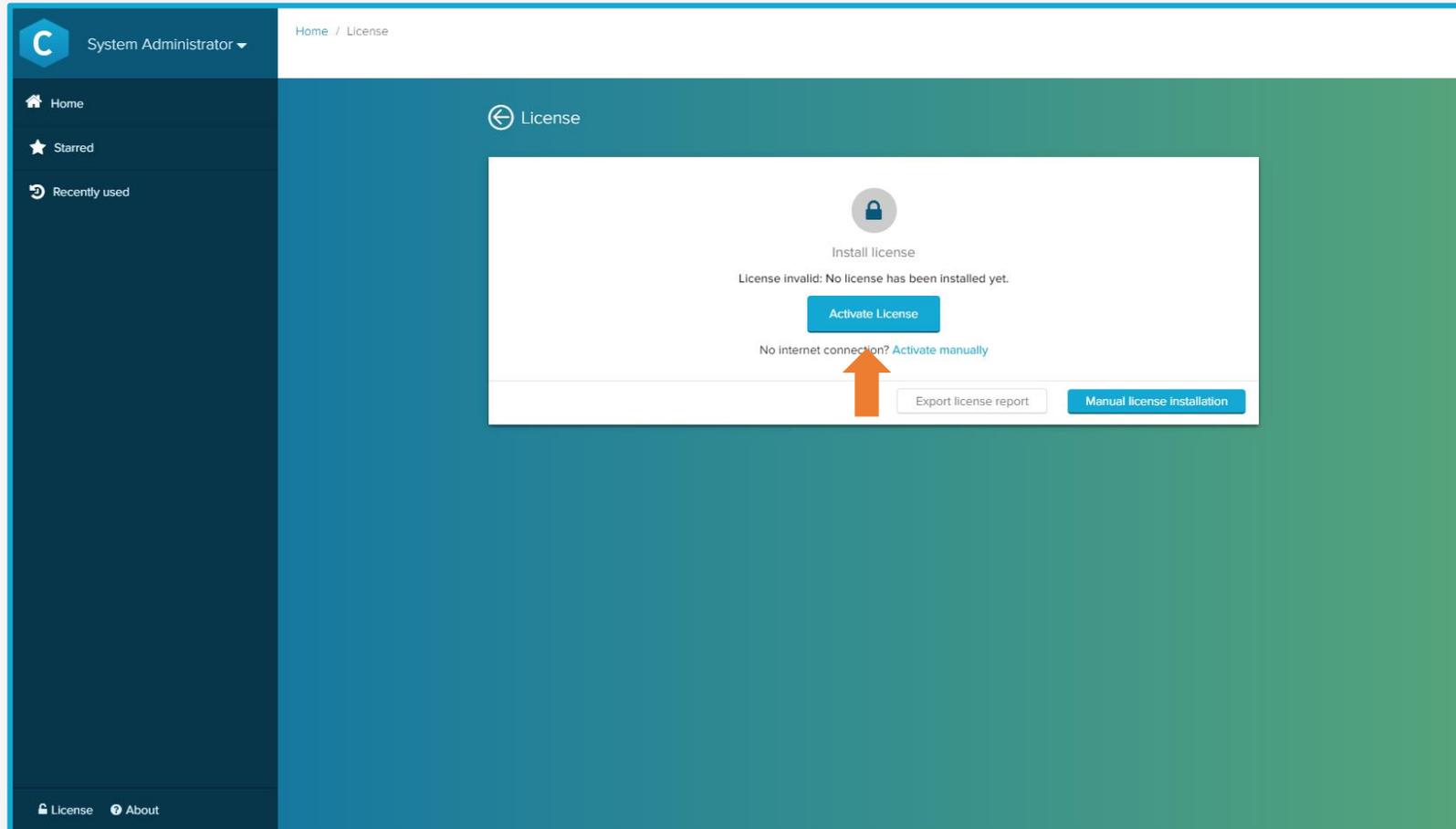
Need an account?  
Go through the link below to join  
My Celonis

**Sign up**

Go to [my.celonis.de](https://my.celonis.de):

- ✓ Sign in to MyCelonis
- ✓ Go to the 'Downloads' section ([my.celonis.de/downloads](https://my.celonis.de/downloads))
- ✓ Download the setup file by clicking on 'Download Mac OS' or 'Download Windows x64' (depending on which operating system you use)
- ✓ Run the setup file and follow the instructions
- ✓ Choose the directory where you want to install Celonis<sub>4</sub>

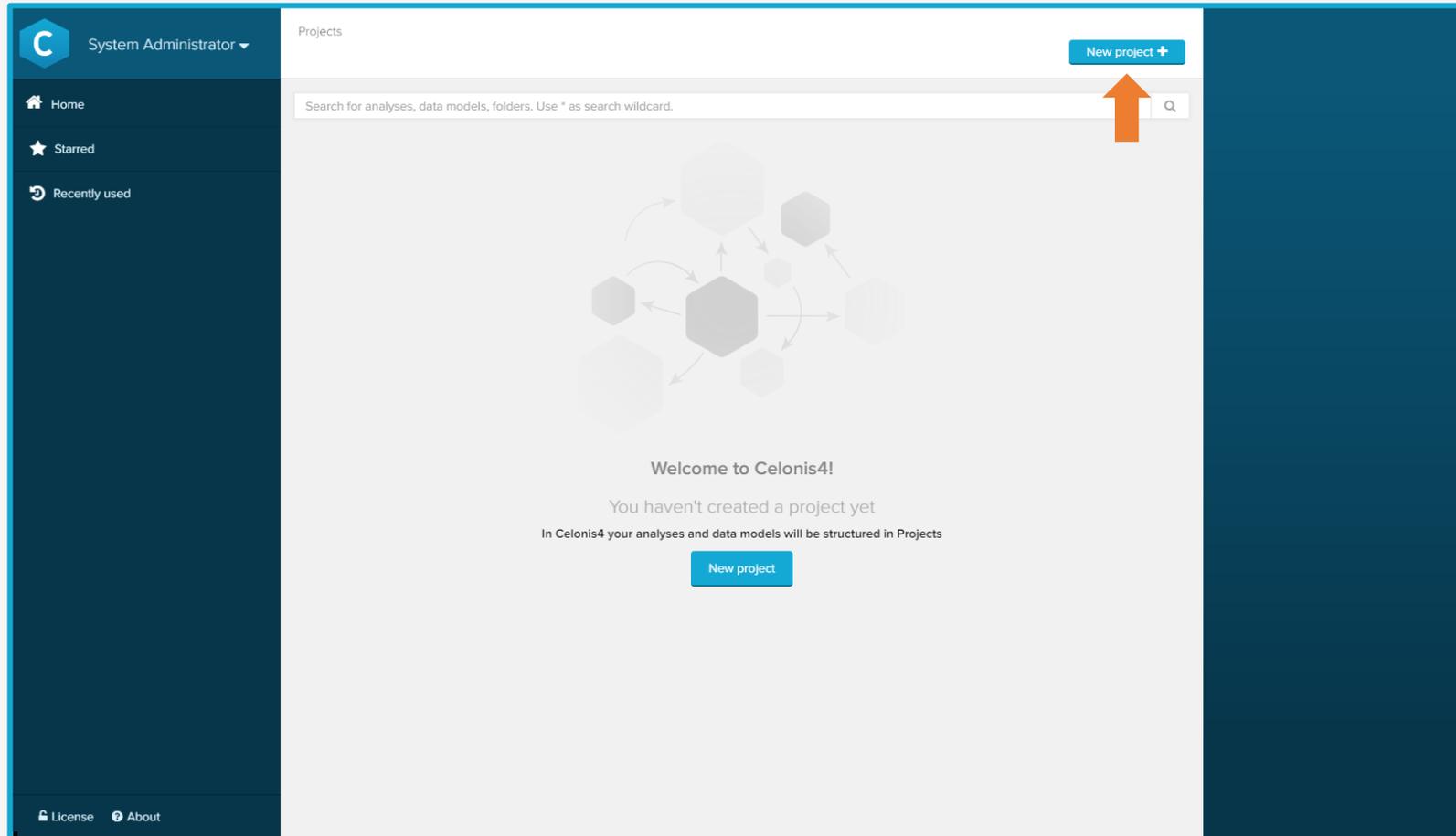
# Installation (Single User)



## Activate License:

- ✓ Start Celonis4 (Desktop-Shortcut)
- ✓ Click on ‚Activate license‘.
- ✓ Log in at the appearing log-in screen with your account data for my.celonis.de
- ✓ If you have multiple licenses, choose the licence id you want to activate
- ✓ Finish by clicking on ‚Activate‘
- ✓ Now the licence report is shown to you, which you can export by clicking on the corresponding button on the bottom right of the window
- ✓ When you are finished, click on the Celonis4 icon on the top left

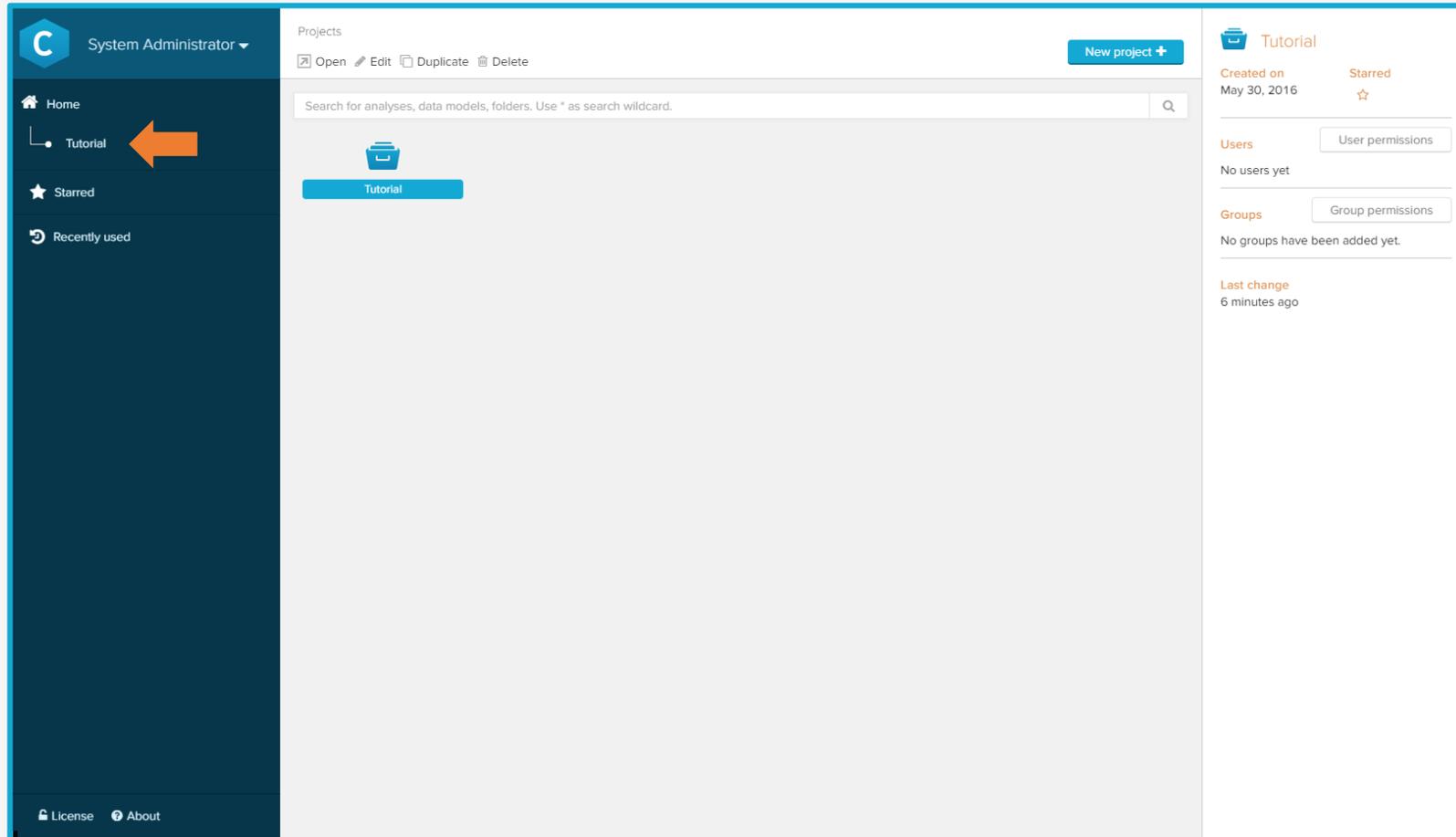
# Create a Project



## Add a new Project:

- ✓ Click on the 'New Project' button
- ✓ Name your project and confirm by clicking 'Done' or press Enter
- ✓ You are now inside the project-folder

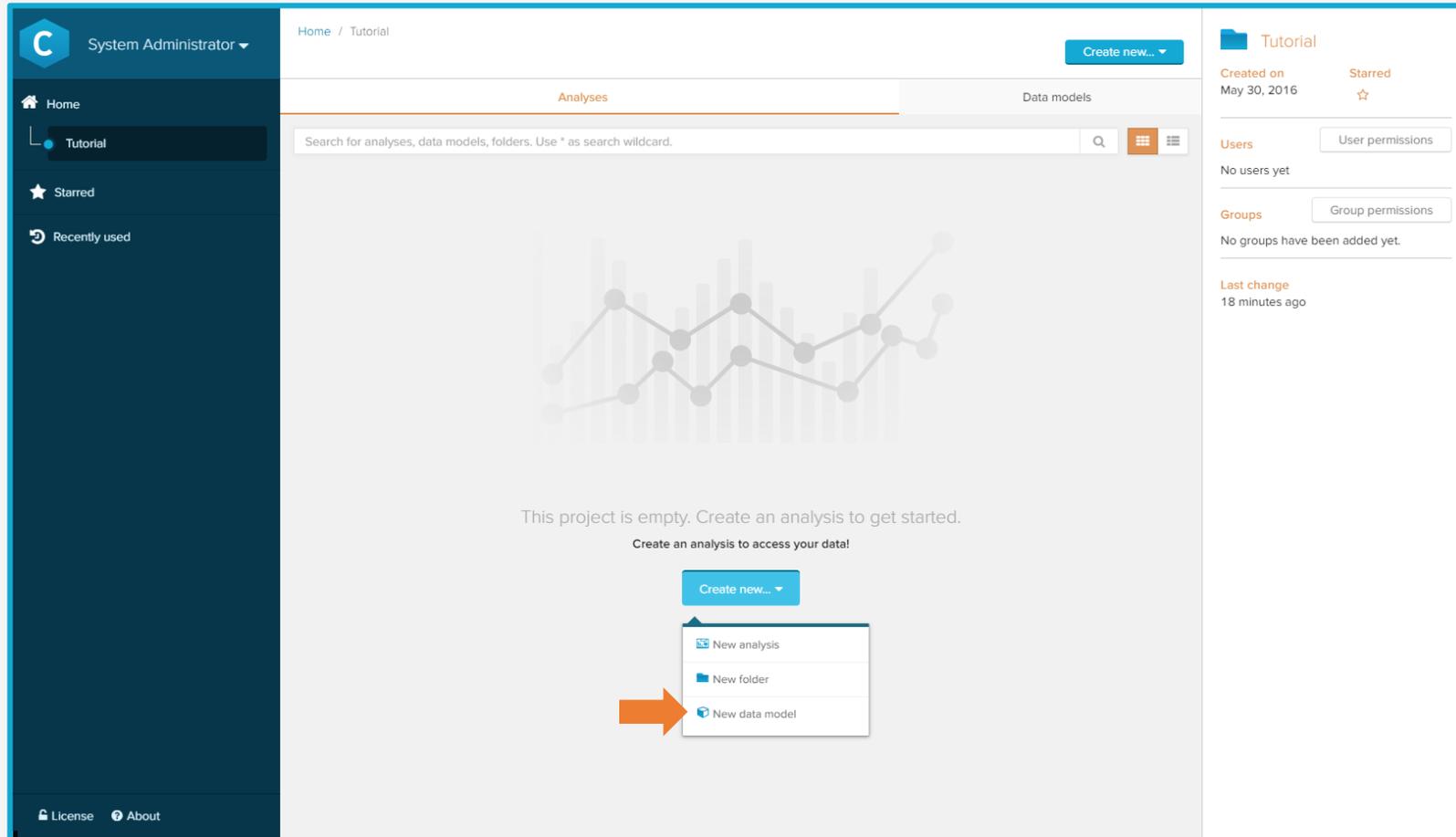
# Create a Project



## Add a new Project:

- ✓ When you click on 'Home' in the left panel, the newly created project is listed in your project overview
- ✓ Your project is also included in the list of all projects
- ✓ Enter your project by double-clicking the icon or by clicking the open-button on the top

# Create a data model



## Add a New data model:

- ✓ Click on the 'Create New ...' button
- ✓ Select 'New data model'
- ✓ Name your new data model
- ✓ Proceed by clicking 'Done' or pressing Enter

# Create a data model

The screenshot shows the 'Tutorial / Tutorial data model' interface. The top navigation bar includes 'Graphic editor', 'Tables', 'Keys', 'Data sources', 'Name mapping', 'Calendar', 'Scheduling', 'Authorizations', and 'Status'. On the right, there are 'Import data' and 'Done' buttons. The main workspace contains the following content:

Get started by importing your data.

**File import**

Drag & drop a file here or

**Connect to database**

and choose tables to import

## Add a New data model:

- ✓ In the next step, you can choose to either import multiple or single tables
- ✓ Select the multi-table import
- ✓ Now you can choose to import either a local file or data from a database
- ✓ Drag and drop the 'TUTORIAL\_Activities' file to the browser or open the file by clicking on 'Select file'
- ✓ When the upload was successful, you will be directly directed to the csv-file parsing

# Create a data model

Tutorial / Tutorial data model HELP

← CSV-file parsing options

If the data in the preview doesn't look correct, try changing the parsing options.

TUTORIAL\_Activities.csv

File encoding:  Field separator:  Quote character:  Escape sequence:  Line ending:

File has a header row

_CASE_KEY	ACTIVITY_EN	EVENTTIME	ACTIVITY_DETAIL_EN	_SORTING
181743	Create Delivery	30.01.2009 10:16		
253499	Create Delivery	27.02.2009 03:33		
628324	Create Delivery	13.07.2009 03:39		
502214	Create Delivery	07.05.2009 03:39		
933370	Create Delivery	29.10.2009 10:18		
961433	Create Delivery	10.11.2009 03:39		
274686	Create Delivery	09.02.2009 12:17		
316703	Create Delivery	25.02.2009 03:41		
343702	Create Delivery	06.03.2009 07:46		
892926	Create Delivery	03.11.2009 10:17		
993155	Create Delivery	15.12.2009 13:49		
482689	Create Delivery	30.04.2009 03:38		
970279	Create Delivery	17.12.2009 09:16		



## Add a New data model:

- ✓ The next step contains the .csv parsing options
- ✓ You can select the separators, quote characters, the escape sequence and the line ending used in the .csv file
- ✓ You can also specify if the .csv file contains a header row
- ✓ You can check in the preview if all columns are identified correctly
- ✓ For this tutorial the settings should be fine on default, so continue with ,NEXT'

# Create a data model

Tutorial / Tutorial data model HELP

← Column data types

Review that the automatically detected column types are correct.

Table name  
TUTORIAL\_Activities.csv

_CASE_KEY	ACTIVITY_EN	EVENTTIME	ACTIVITY_DETAIL_EN	_SORTING
INTEGER	STRING	AUTOM. DETECTION FINISHED ✓	STRING	STRING
181743	Create Delivery			
253499	Create Delivery			
628324	Create Delivery			
502214	Create Delivery			
933370	Create Delivery			
961433	Create Delivery			
274686	Create Delivery	09.02.2009 12:17		
316703	Create Delivery	25.02.2009 03:41		
343702	Create Delivery	06.03.2009 07:46		
892926	Create Delivery	03.11.2009 10:17		
993155	Create Delivery	15.12.2009 13:49		
482689	Create Delivery	30.04.2009 03:38		
970279	Create Delivery	17.12.2009 09:16		
281682	Create Delivery	12.02.2009 03:41		

Cancel Back Next

**Message:** AUTOM. DETECTION FINISHED ✓  
Datatypes have been detected based on the 483,064 rows inspected.  
Please make sure that the automatically detected datatypes are correct, otherwise some features of CPM will not work.

**Annotations:** An orange arrow points to the 'Got it' button in the message box. Another orange arrow points to the 'Next' button at the bottom right of the interface.

## Add a New data model:

- ✓ Now the column data-types will be detected automatically
- ✓ Confirm the automated detection
- ✓ Afterwards the data-types can be changed by the user
- ✓ This will not be necessary for this tutorial
- ✓ Klick ,Next' to continue

# Create a data model

## Add a New data model:

- ✓ In the next step, the columns of the activity table will be mapped
- ✓ Select the case, activities and timestamps column
- ✓ If you accidentally chose the wrong column, you can reselect the columns by clicking on the corresponding digit at the top
- ✓ You will not need a ,sorting' or ,end timestamp'-column in this tutorial
- ✓ For the tutorial data, we need to upload a second table. To do so, click on the dropdown and choose ,Finish' to continue
- ✓ However if you only have one table, click „Finish, create new analysis“ and continue the tutorial on [page 16](#)

Tutorial / Tutorial data model HELP

← Map activity table columns

For Process Mining to function, we need to find out which columns contain the necessary data.

Select activity's timestamp column

Click on the column that contains the timestamp for each activity. Timestamps usually look something like "1.2.2016 14:24:30" although the exact format of the timestamp may differ.

_CASE_KEY	ACTIVITY_EN	EVENTTIME	ACTIVITY_DETAIL_EN	_SORTING
161713	Create Delivery	27.02.2009 03:33		
253499	Create Delivery	13.07.2009 03:39		
628324	Create Delivery	07.05.2009 03:39		
502214	Create Delivery	29.10.2009 10:18		
933370	Create Delivery	10.11.2009 03:39		
961433	Create Delivery	09.02.2009 12:17		
274686	Create Delivery	25.02.2009 03:41		
316703	Create Delivery	06.03.2009 07:46		
343702	Create Delivery	03.11.2009 10:17		
892926	Create Delivery	15.12.2009 13:49		
993155	Create Delivery	30.04.2009 03:38		
482689	Create Delivery			

Buttons: Cancel, Back, Finish, create new analysis

# Create a data model

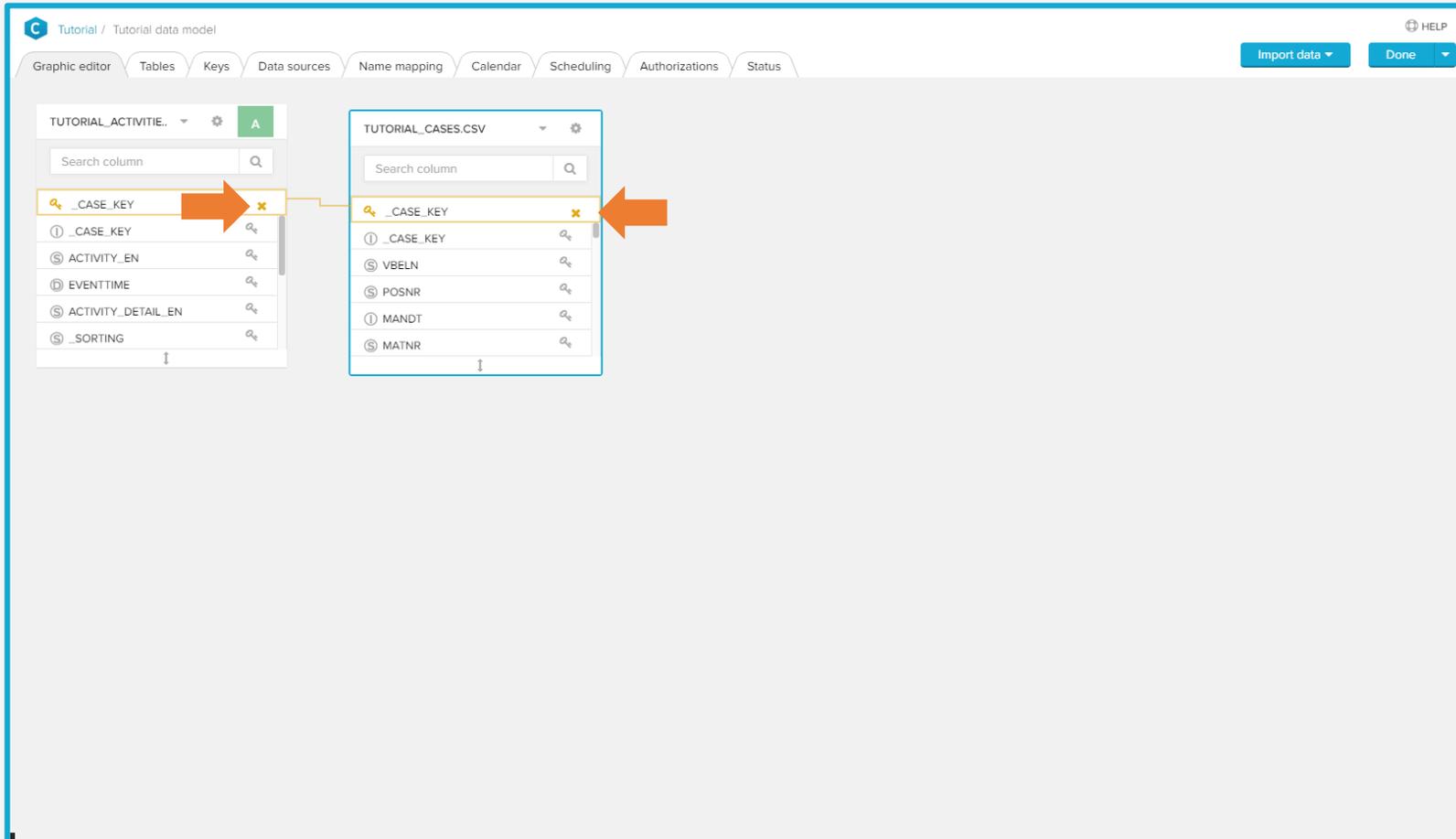
The screenshot shows the Celonis data model editor interface. The top navigation bar includes 'Graphic editor', 'Tables', 'Keys', 'Data sources', 'Name mapping', 'Calendar', 'Scheduling', 'Authorizations', and 'Status'. The main workspace displays a table named 'TUTORIAL\_ACTIVITIE...' with columns: '\_CASE\_KEY', 'ACTIVITY\_EN', 'EVENTTIME', 'ACTIVITY\_DETAIL\_EN', '\_SORTING', and 'USER\_NAME'. An orange arrow points to the 'Import data' dropdown menu, which is open, showing options for 'Import from file' and 'Import from database'. The 'Done' button is also visible in the top right corner.

## Import Case Table:

- ✓ The activities table has now been successfully added to your data model
- ✓ Click on the 'Import data' button to repeat the process for the TUTORIAL\_Cases.csv
- ✓ The only difference with respect to the activity table upload is that no process configuration is needed

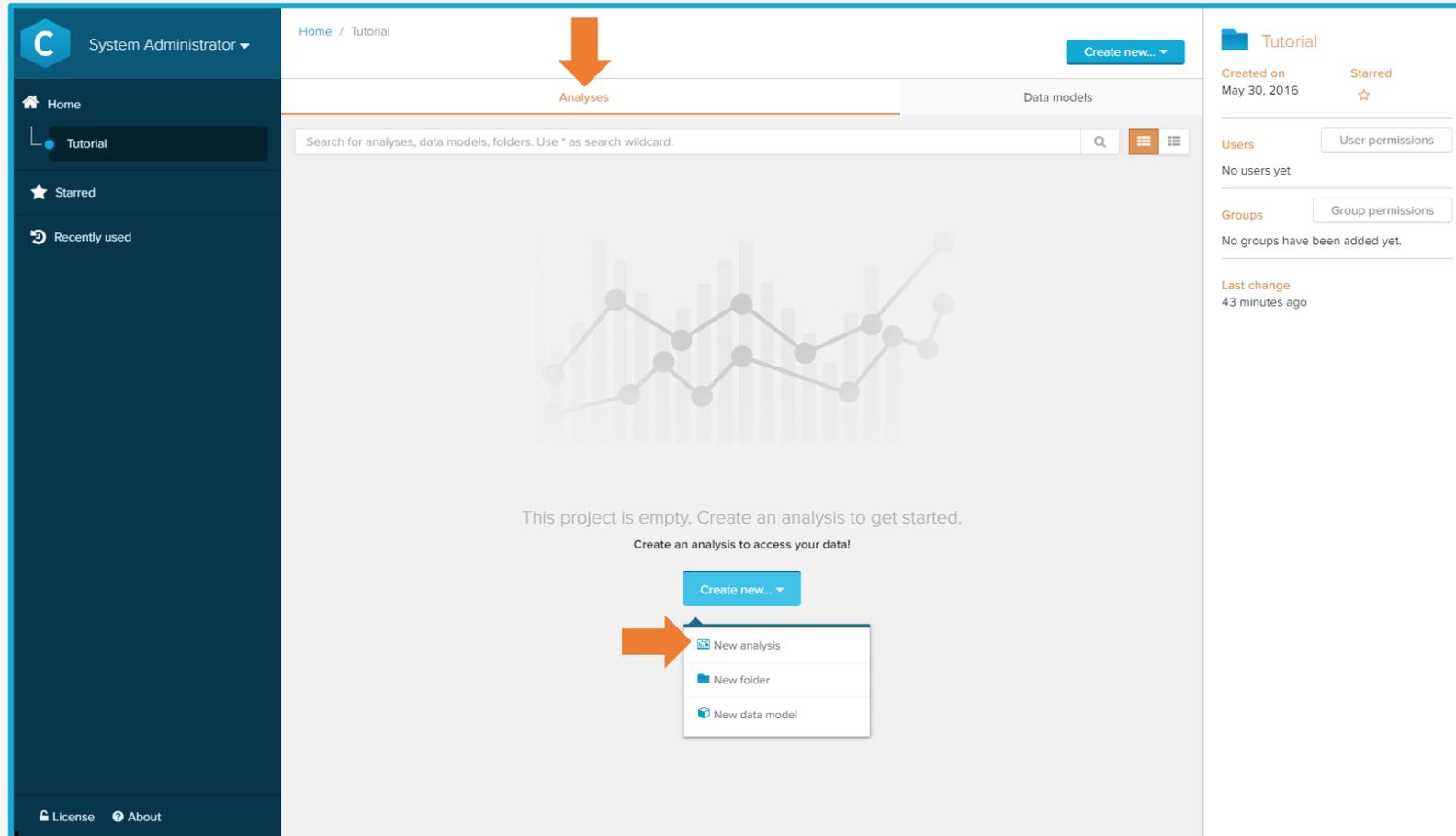
# Create a data model

## Add Foreign Key:



- ✓ The case table has now been added to your data model
- ✓ Drag&Drop it to the right to show both tables
- ✓ To complete the data model configuration, you have to add a foreign key
- ✓ Click on the key-button of the ,caseid' column of the case table
- ✓ Click on the key-button next to the ,activitycaseid' column in the activities table
- ✓ Now a foreign key has been created to link the tables
- ✓ Exit the Data Model Editor by clicking ,Done' (by clicking on ,Done, create new analysis', a standard analysis is created)

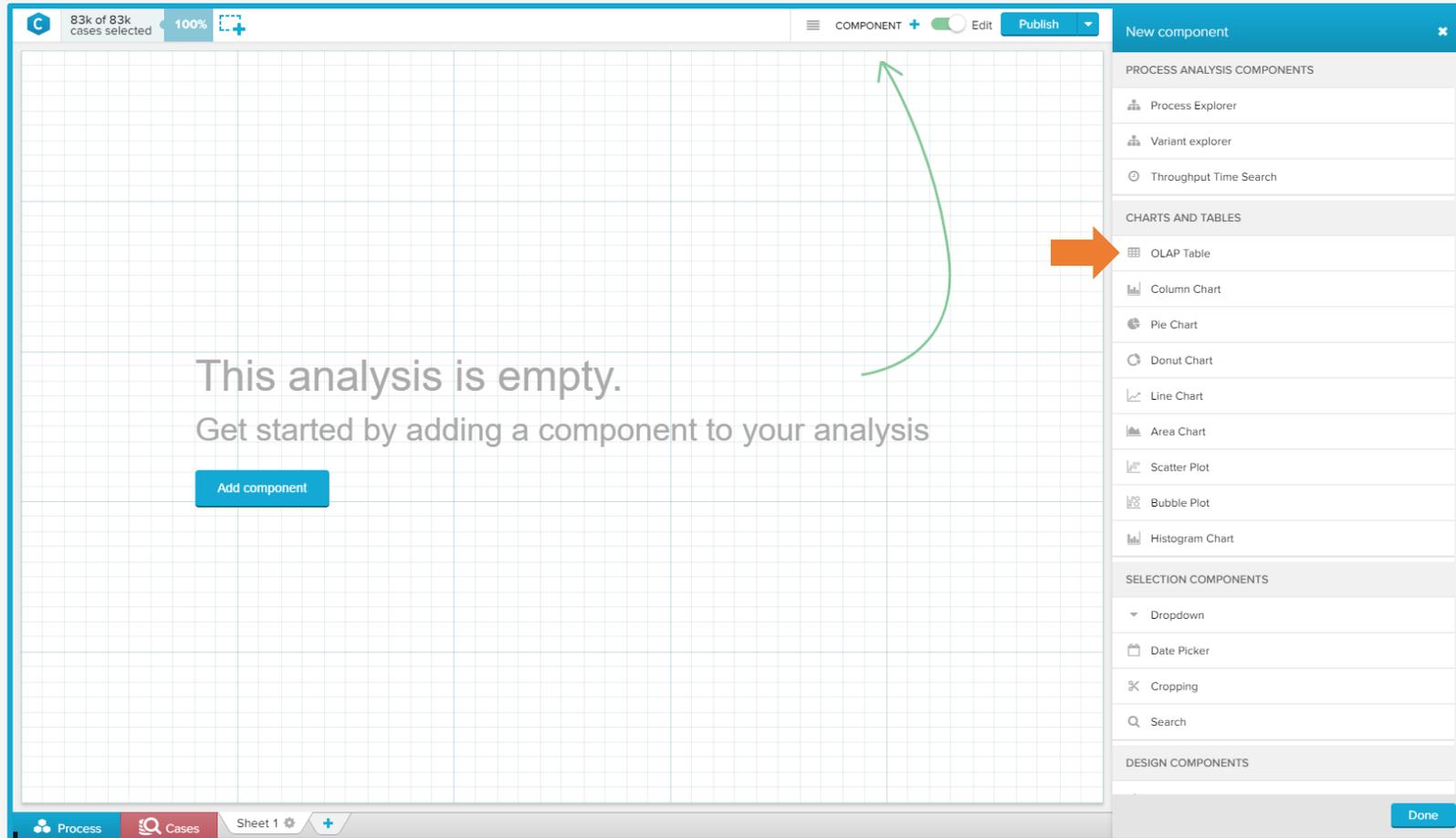
# Create an Analysis



## Add a new analysis:

- ✓ Create a new analysis by clicking on 'Create New...' and 'New analysis'
- ✓ Choose your data model in the dropdown for existing data models
- ✓ Name your analysis
- ✓ Confirm with 'Done' or press Enter

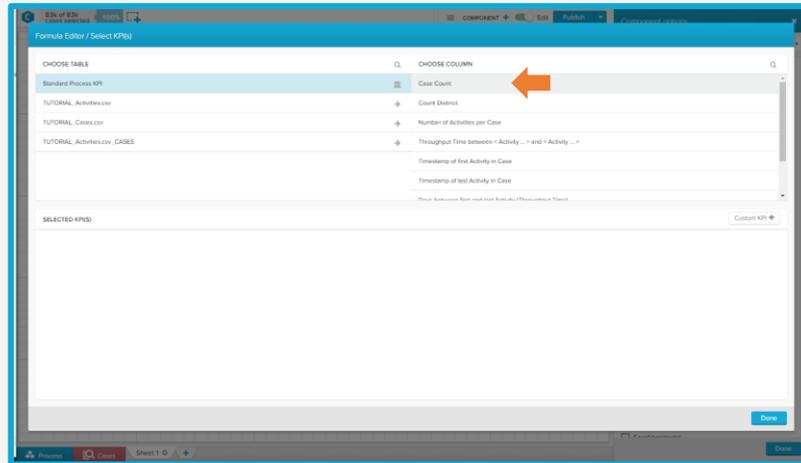
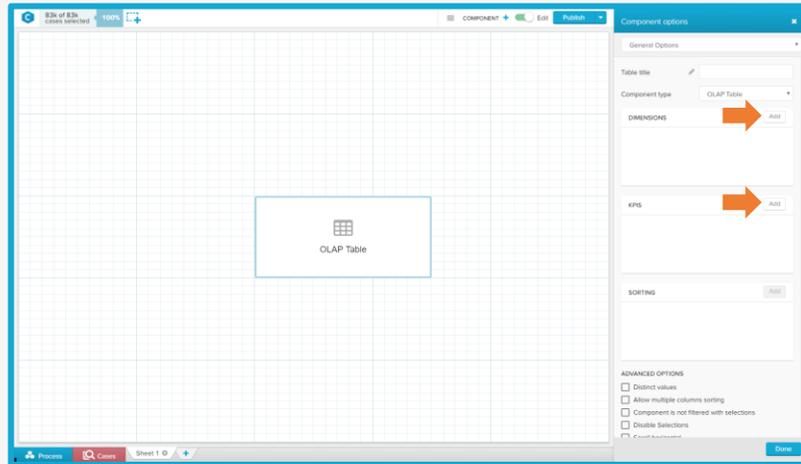
# Create an Analysis



## Add Components:

- ✓ Click on 'Add component' to add your first component to the analysis
- ✓ Drag and drop an 'OLAP-Table' to the empty canvas

# Create an Analysis



## Configure Component:

- ✓ Add a dimension to the OLAP Table
- ✓ Choose the 'ACTIVITY\_EN' column as dimension
- ✓ You can navigate the tables and columns over the clickable rows in the formula editor
- ✓ Add a case count as KPI
- To do so, you can select the case-count from the 'Standard Process KPIs'
- ✓ All added KPIs will be listed in the dimensions list underneath the table navigation and can be edited and deleted here

# Create an Analysis

The screenshot shows the Celonis software interface. At the top, it indicates '83k of 83k cases selected' and '100%' zoom. The main area contains a table with the following data:

Table title	Case Count
ACTIVITY_EN	1
Change Plant	2
Change Delivery Amount	3
Credit memo cancellation	3
Billing Block changed	6
Change Customer	25

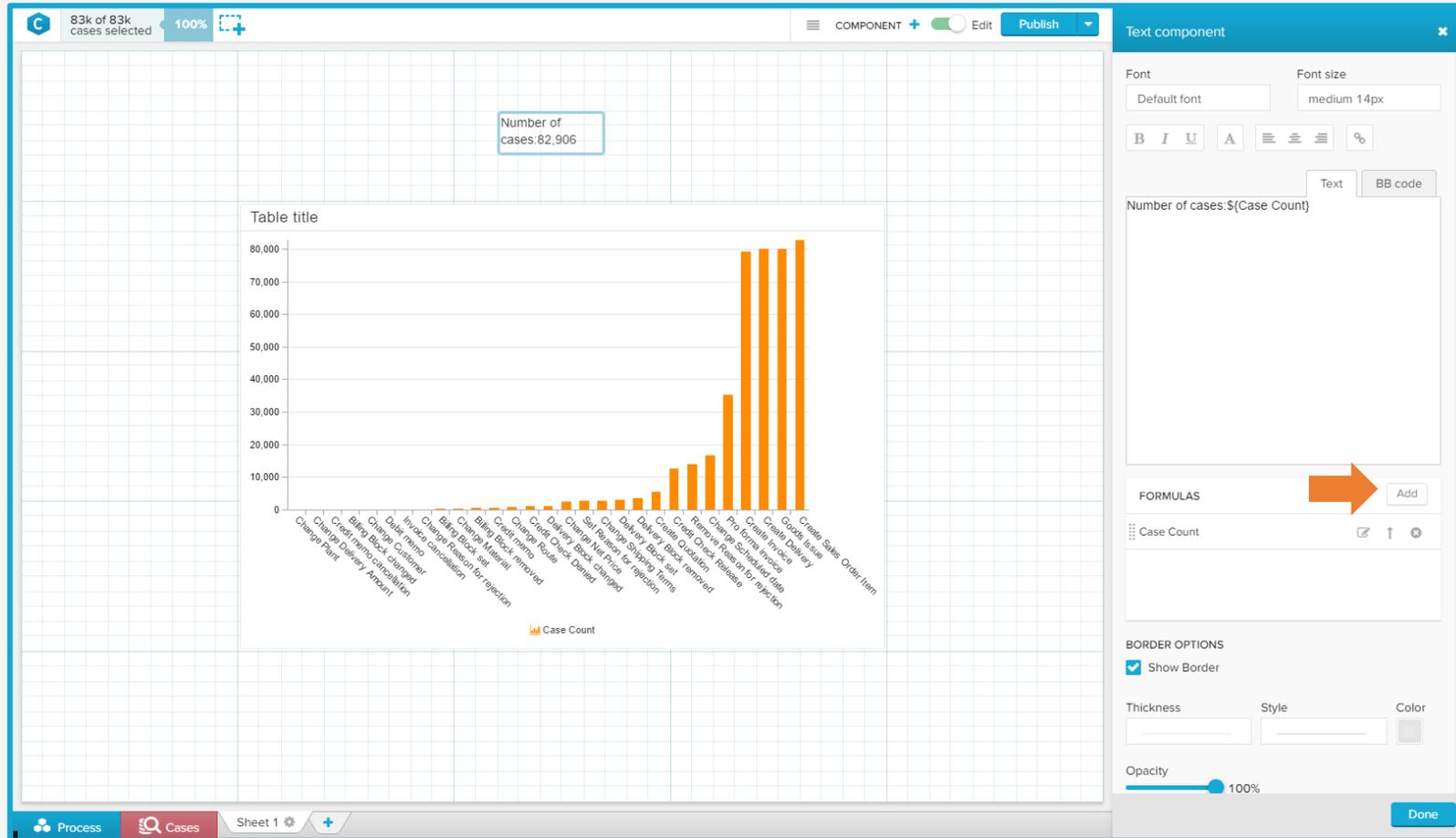
On the right, the 'Component options' panel is open, showing settings for the table. The 'General Options' dropdown is set to 'Table title'. The 'Component type' is 'OLAP Table'. Under 'DIMENSIONS', 'ACTIVITY\_EN' is listed. Under 'KPIs', 'Case Count' is listed. Under 'SORTING', 'Case Count' is selected. The 'ADVANCED OPTIONS' section includes checkboxes for 'Distinct values', 'Allow multiple columns sorting', 'Component is not filtered with selections', 'Disable Selections', and 'Scroll horizontal'.

## Configure Component:

- ✓ Sort your table by the number of cases  
To do so, drag and drop the case count KPI to the Sorting field
- ✓ Alternatively exit the edit mode with the edit mode toggle and click on the table header of the corresponding column
- ✓ Re-enter the settings with a rightclick on the component
- ✓ Add a title to your table  
To do so, type in the title text field at the top of the settings panel
- ✓ Change the title format in the table area options panel
- ✓ To change the settings panel, use the dropdown on the top of the settings panels



# Create an Analysis



## Additional Components:

- ✓ Add a text component to your analysis
- ✓ Type in: ,Number of Cases:‘
- ✓ Now add a formula to your text component:
- ✓ Add a case count (Same KPI as added to the table previously)
- ✓ To insert the formula, place the cursor at the designated position and click the arrow button next to the formula
- ✓ To change the format or color of your text, select the whole text in the editor and change the settings at the top

# Create an Analysis

83k of 83k cases selected 100%

COMPONENT + Edit Publish Component options

Edit Formula

CHOOSE TABLE CHOOSE COLUMN

Standard Process KPI

Variables

TUTORIAL\_Activities.csv

TUTORIAL\_Cases.csv

TUTORIAL\_Activities.csv\_CASES

EDIT FORMULA Show Functions

COUNT\_TABLE(\*TUTORIAL\_Activities.csv\_CASES)\*0.4

FORMULA OPTIONS

Formula title

New Expression

Predefined formats

Rounded number (###)

Formatting formula

.f

Documentation

Units

Done

Process Cases Sheet 1 +

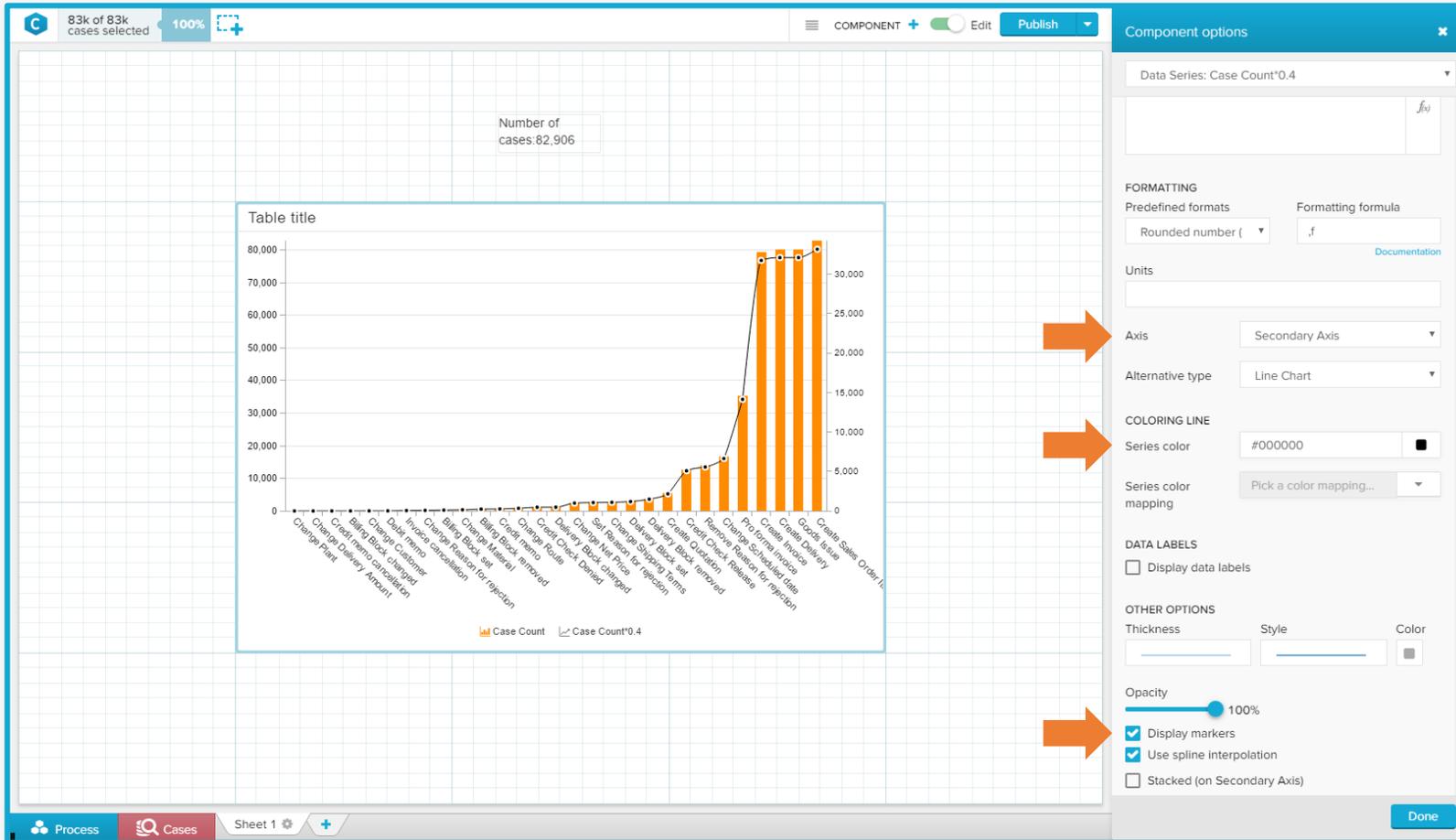
Component is not filtered with selections

Done

## Add a second KPI

- ✓ Open the settings of your column chart via right click on the component
- ✓ Add a second KPI:
  - Click on 'Custom KPI' in the formula editor
  - Insert the case count from the 'Standard Process KPIs'
  - Modify the formula by multiplying it with a decimal number of your choice (e.g. \*0.4)
  - Confirm with 'DONE'

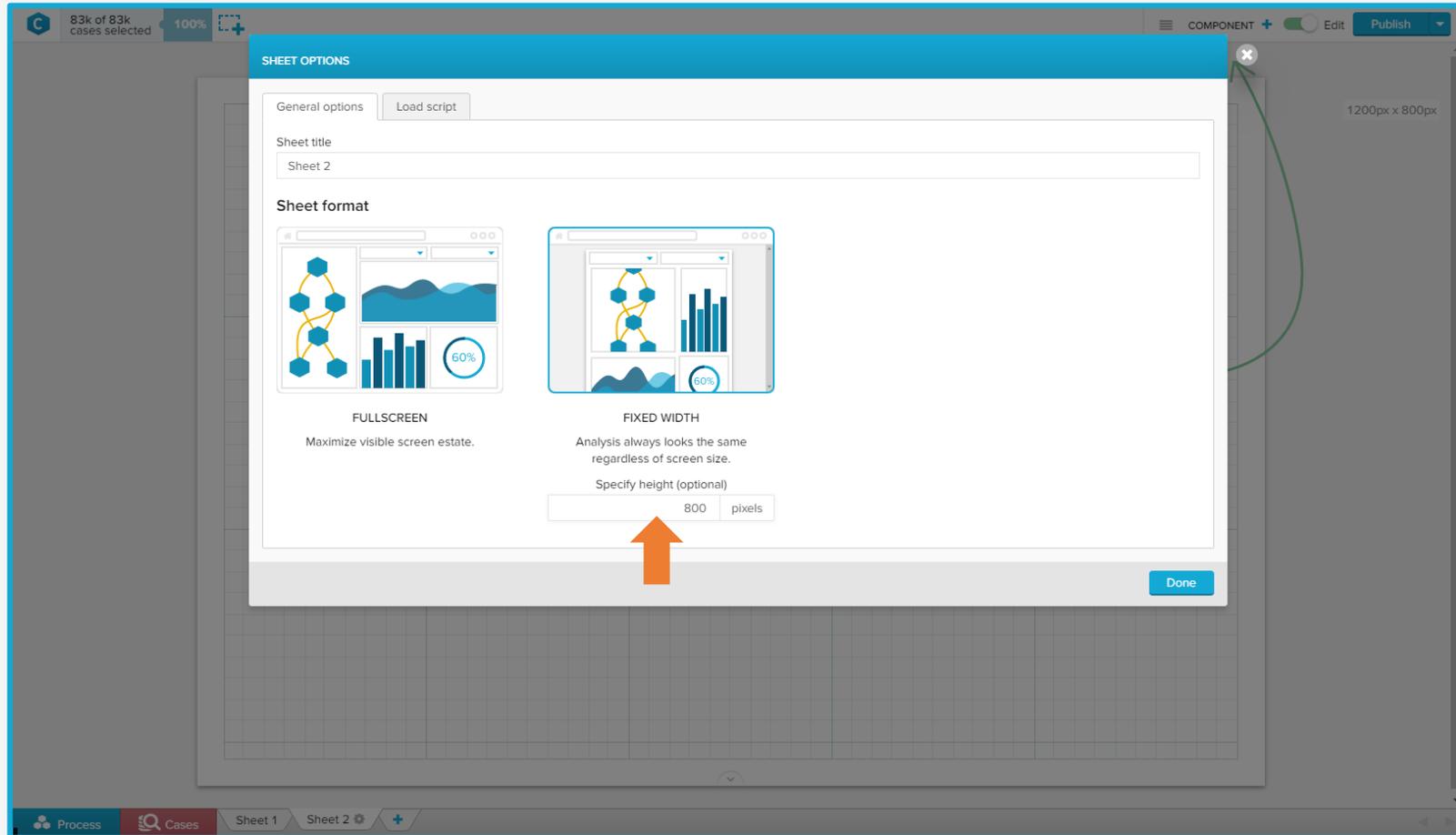
# Create an Analysis



## Set Secondary Axis:

- ✓ Open the 'Data Series' panel for your new KPI (dropdown at the top)
- ✓ Change the 'Series Name'
- ✓ Change the axis to 'Secondary Axis'
- ✓ Change the alternative type to 'Line Chart'
- ✓ Change the color to black
- ✓ Activate markers
- ✓ Activate spline interpolation

# Create an Analysis



## Add additional sheet:

- ✓ Add a new sheet by clicking on the plus button on the bottom left
- ✓ Open the sheet setting by clicking on the cogwheel at the tab.
- ✓ Change the sheet-type to fixed width
- ✓ Navigate between the sheets by clicking on the tabs at the bottom

# Create an Analysis

The screenshot displays the Celonis analysis editor interface. The main canvas is a large grid with a button component placed in the center. The button has the text "Go to sheet 1". To the right of the canvas is a "Button" configuration panel. The panel includes the following settings:

- Button title: Go to sheet 1
- TITLE FORMATTING: Font (Default font), Size (x-large 17px)
- Buttons for Bold (B), Italic (I), Underline (U), and Text color (A)
- Button action: Open Tab
- Sheet: Sheet 1
- BACKGROUND OPTIONS:  Show background

An orange arrow points from the button on the canvas to the configuration panel. The top of the interface shows "83k of 83k cases selected" and "100%". The bottom of the interface shows a tab bar with "Process", "Cases", "Sheet 1", and "Sheet 2". A "Done" button is located at the bottom right of the configuration panel.

## Add a sheet shortcut:

- ✓ Insert a button to the second sheet:
  - Drag and drop the button component to the canvas
  - Type in a title
  - Select 'Open Tab' as action
  - Select your first sheet as Sheet
- ✓ Now you have created a button to jump to your first sheet
- ✓ You can try using it by switching off the edit mode and clicking on the button



# Create an Analysis

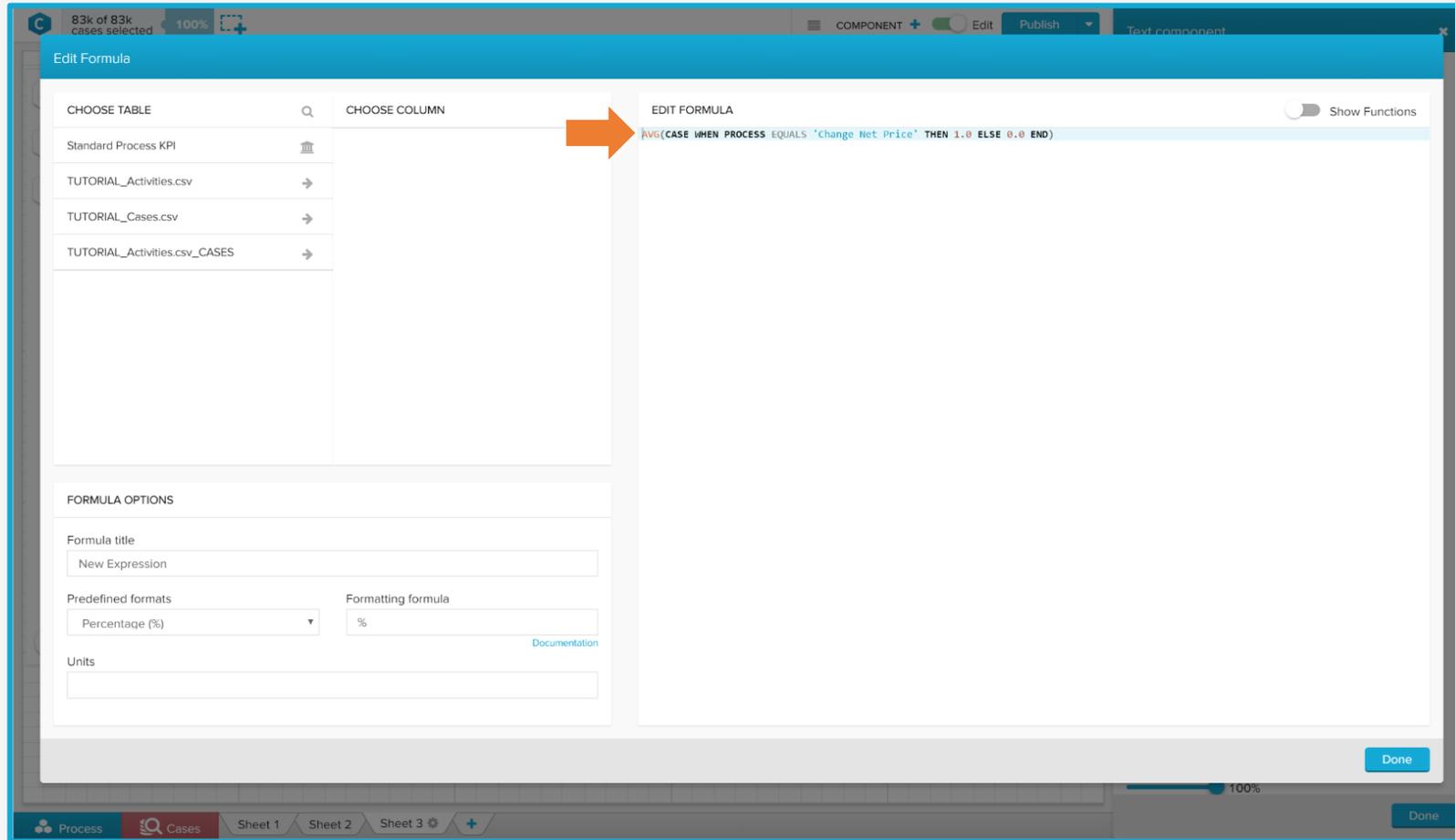
## Functions in Celonis4:

- ✓ Create a third sheet
- ✓ Insert the 'Process Explorer' component
- ✓ Create a text component
- ✓ Now we want to display the percentage of price changes
- ✓ Add a formula and click on 'Custom KPI'
- ✓ Type in the following syntax:

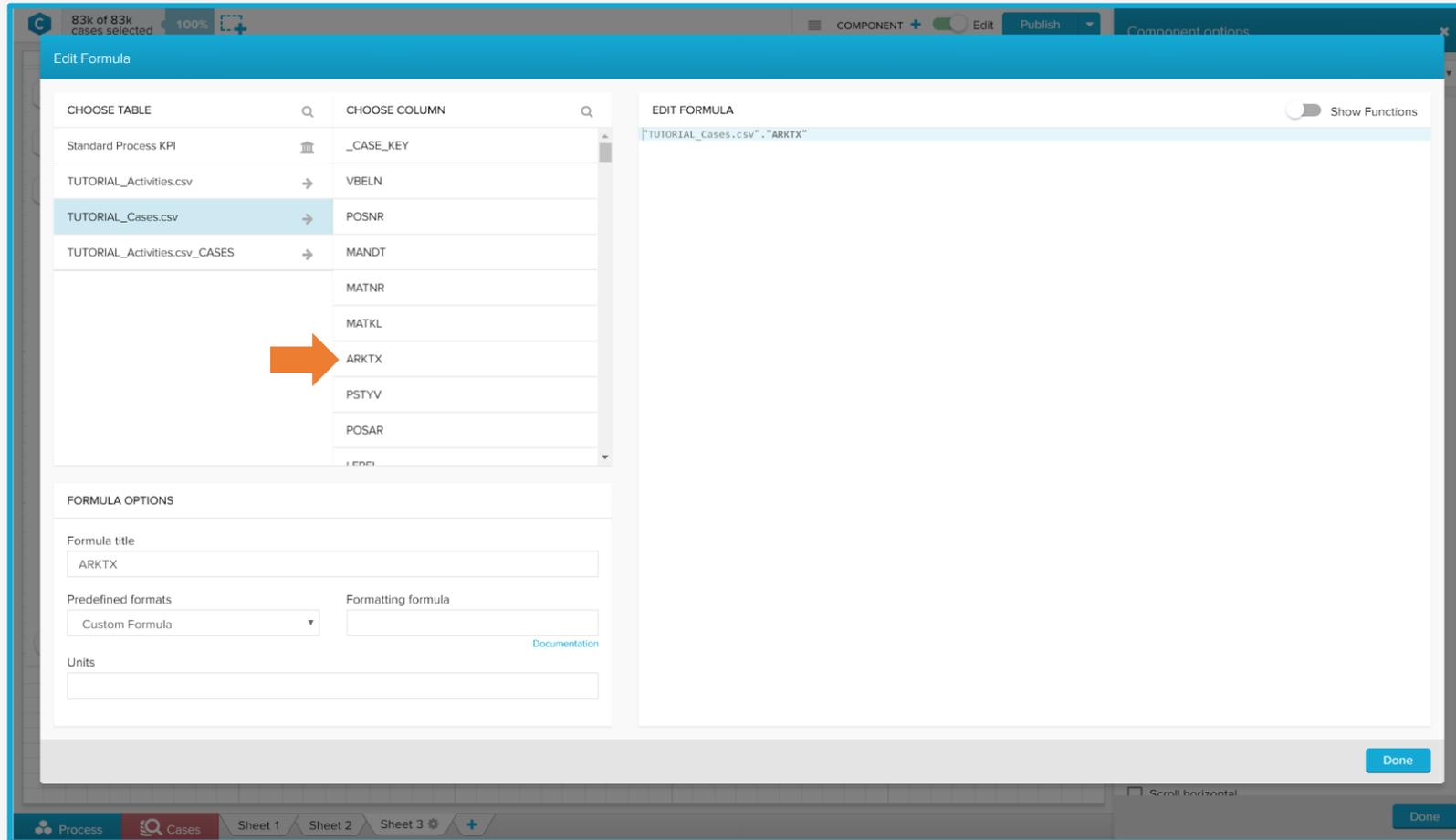
*AVG(CASE WHEN PROCESS EQUALS 'Change Net Price' THEN 1.0 ELSE 0.0 END)*

- ✓ To display percentages change to 'Percentage' in the 'Predefined Formats' at the bottom left of the formula editor

- ✓ Insert the formula with the arrow up button in the text component



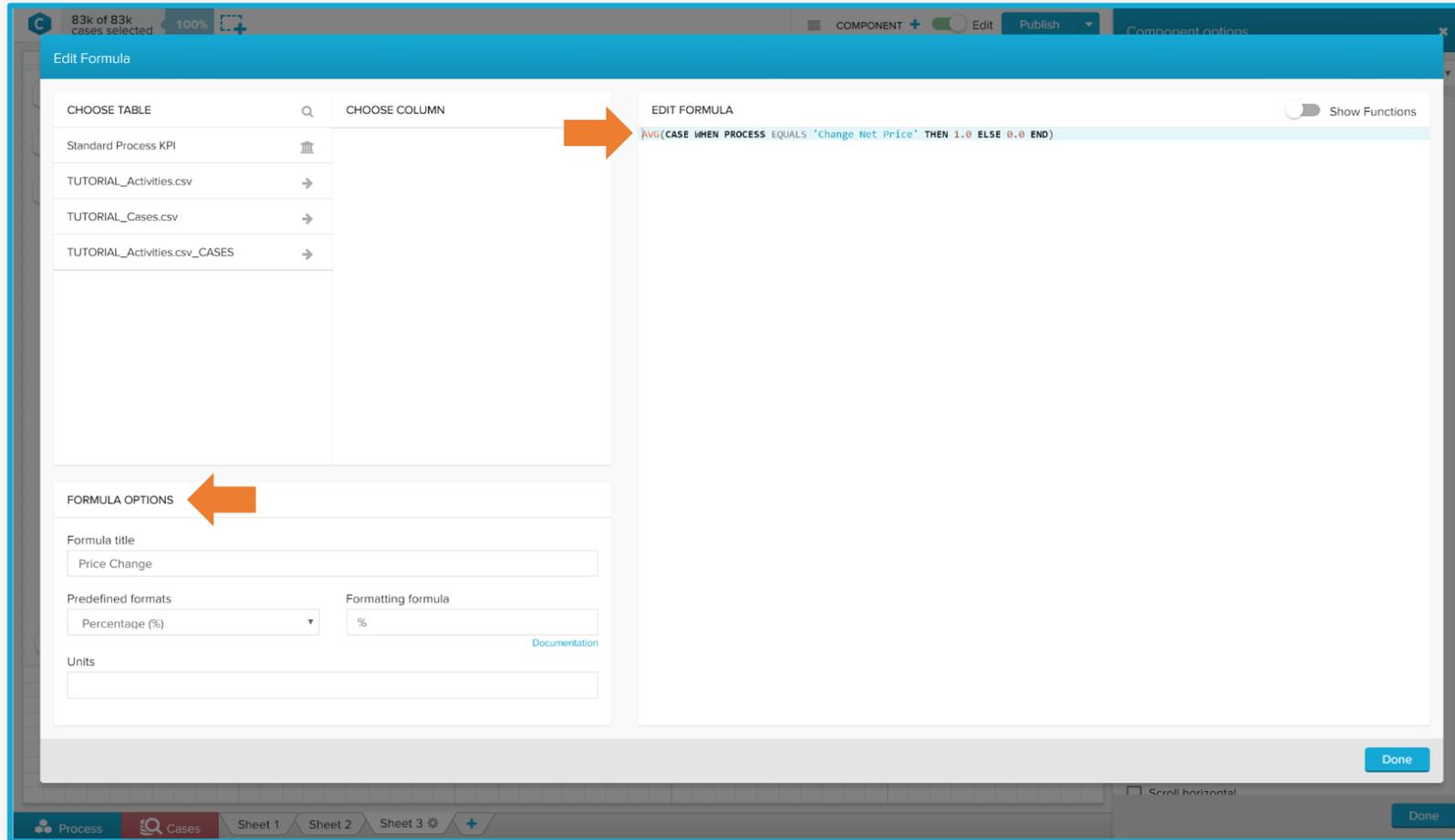
# Create an Analysis



## Functions in Celonis4:

- ✓ Now utilize the function from the text component to analyze which products have the most Price Changes
- ✓ Add an OLAP Table to your Analysis
- ✓ Insert the ARKTX column from the TUTORIAL\_Cases.csv as a dimension
- ✓ You can use the search functionality - the button at the top left

# Create an Analysis



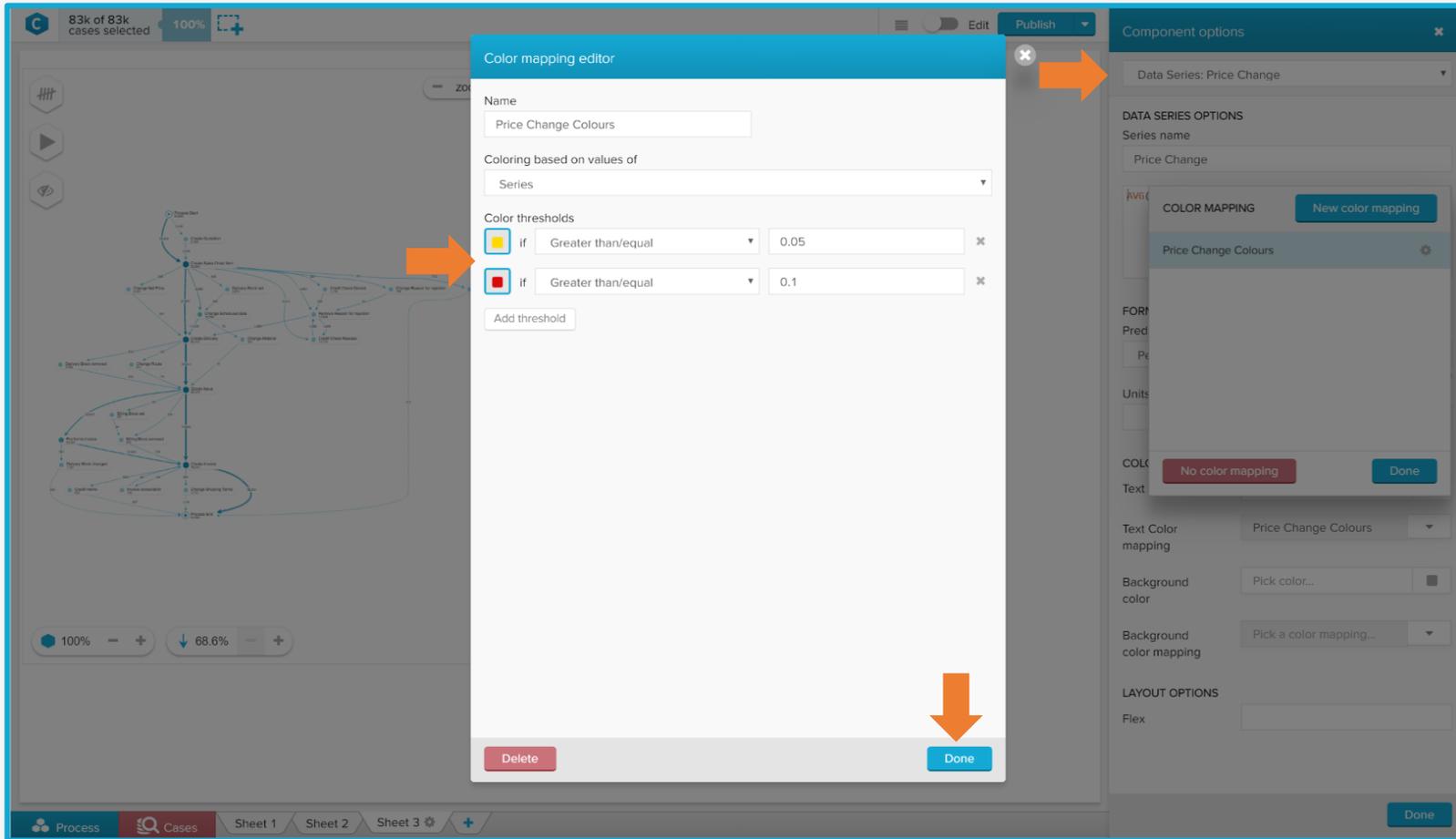
## Functions in Celonis4:

- ✓ Add a case count from the ,Standard Process KPIs'
- ✓ Now click on add custom
- ✓ Type in the same formula as in the text component:

*AVG(CASE WHEN PROCESS EQUALS 'Change Net Price' THEN 1.0 ELSE 0.0 END)*

- ✓ Change the formula title to ,Price Changes' and the format to ,Percentage'

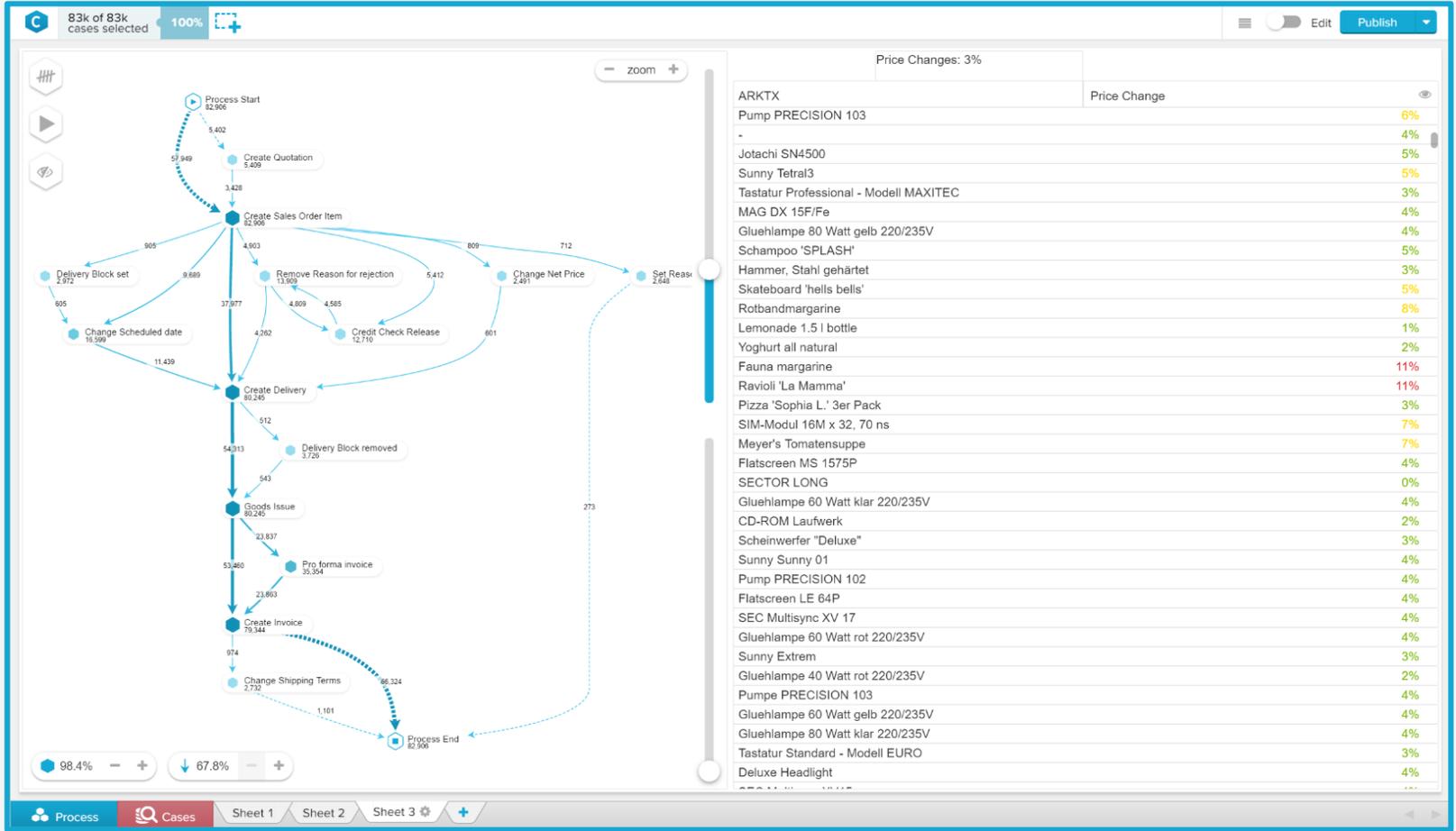
# Create an Analysis



## Functions in Celonis4:

- ✓ Change to the 'Data Series' panel of your price changes (dropdown at the top of the page)
- ✓ Change the text color to green
- ✓ Now we want to add a threshold that sets the text color to yellow or red
  - Click on the option wheel next to the 'Text color mapping' field and add a new one
  - Edit the empty color threshold to 'Yellow if Greater than/Equal 0.05'
  - Add another threshold to 'Red if Greater than/Equal 0.1'

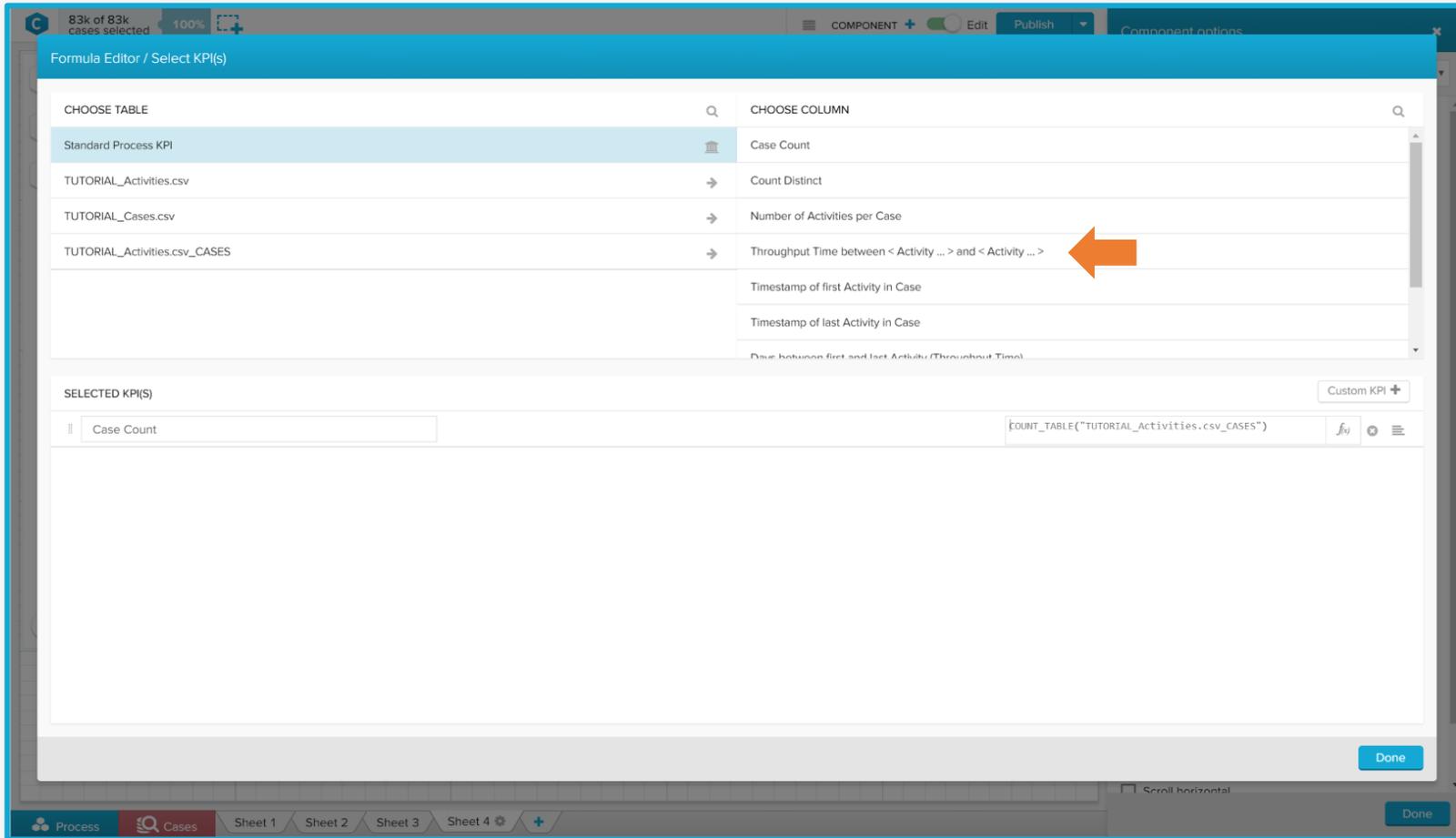
# Create an Analysis



## Functions in Celonis4:

- ✓ Now you have created an analysis where you can display the percentual price changes drilled down to the articles (OLAP Table) and for the whole data set (text component)
- ✓ In a similar way you can add an analysis to display the throughput time between the two activities 'Create Sales Order Item' and 'Create Invoice'

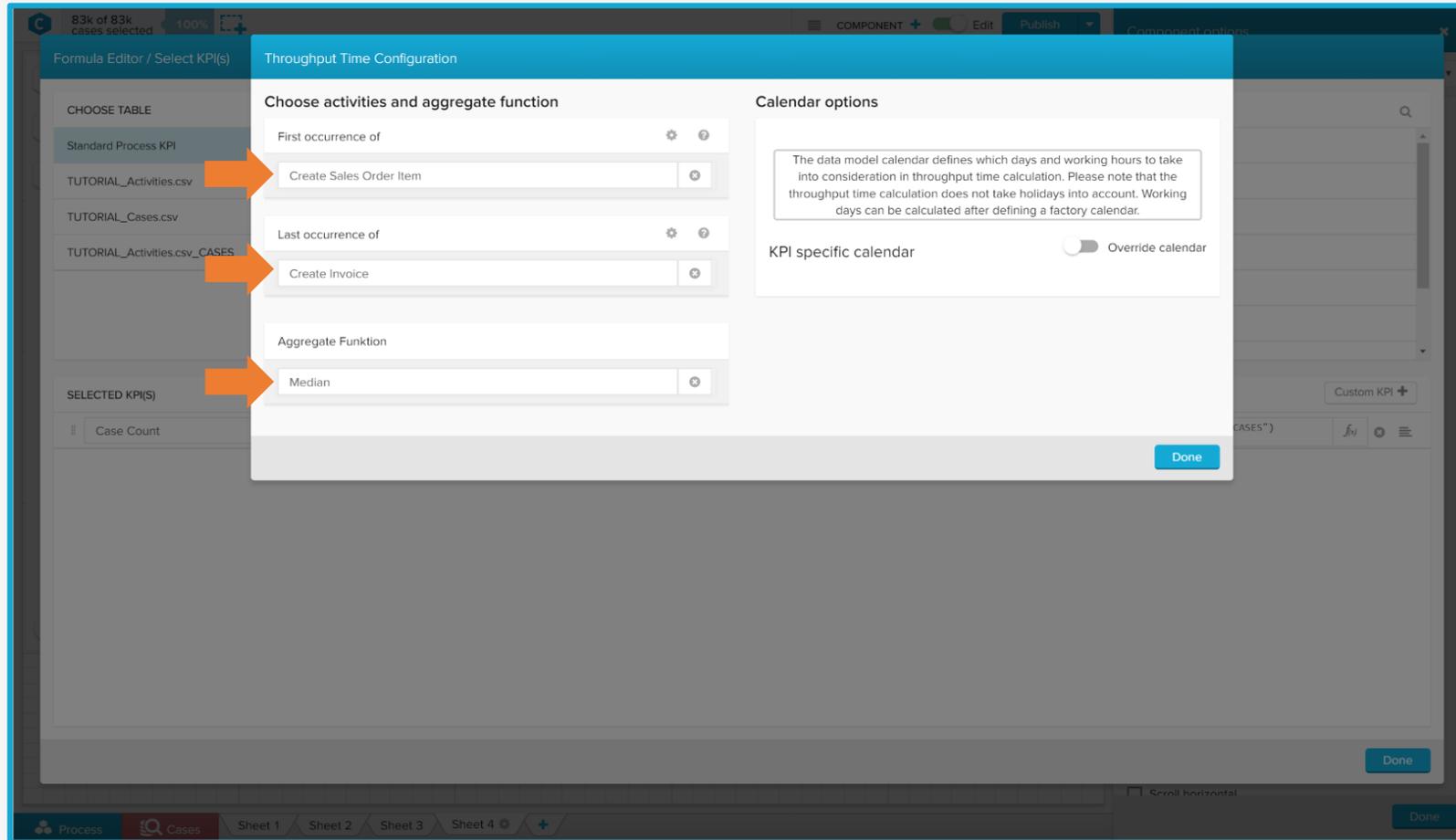
# Create an Analysis



## Functions in Celonis4:

- ✓ In the next step you will again add an OLAP Table to drill down to the articles with high throughput times
- ✓ Add an OLAP Table to a new sheet
- ✓ Add the article names as dimension (ARKTX)
- ✓ Add a case count as first KPI
- ✓ Now add a throughput time KPI. To do so, choose 'Throughput Time ...' from 'Standard Process KPIs'

# Create an Analysis



## Functions in Celonis4:

- ✓ In the 'Throughput Time' context menu you can choose single activities to calculate the throughput time between them via an aggregate functions
- ✓ Select 'Create Sales Order Item' and 'Create Invoice' as the activities
- ✓ Select the median as aggregate function
- ✓ Confirm your selection with 'DONE'
- ✓ In the formula editor, enter the Unit 'days' and confirm the changes with 'DONE'

# Create an Analysis

The screenshot displays the Celonis software interface. On the left, a process flow diagram shows steps from 'Process Start' to 'Process End' with various intermediate tasks like 'Create Sales Order Item', 'Change Scheduled date', 'Create Delivery', 'Goods Issue', 'Pro forma invoice', and 'Create Invoice'. The top bar indicates '83k of 83k cases selected' and '100%' completion. The central table lists data for 'ARKTX' with columns for 'Case Count' and 'Throughput Time'. An orange arrow points to the 'Throughput Time' column header. On the right, the 'Component options' panel is open, showing 'General Options', 'Table title', 'Component type' (OLAP Table), 'DIMENSIONS' (ARKTX), 'KPIs' (Case Count, Throughput Time), and 'SORTING' (Throughput Time). The 'SORTING' section has a sort icon next to 'Throughput Time'. Below this are 'ADVANCED OPTIONS' with several unchecked checkboxes.

ARKTX	Case Count	Throughput Time
describe	2	104 days
Norm Abram	6	96 days
Cardiodyn 5 ml	4	66 days
RR-FG318	4	66 days
Routine work	9	40 days
Palm V Organizer	10	38 days
PHASE 1: Mobilization (Mile...	4	38 days
Turbinenanlage	1	38 days
Easy Pixel	3	36 days
Rotbandmargarine	9	35 days
test2	2	35 days
CITTA	3	34 days
Scaahedule 2a Drug	4	34 days
Project Management	3	33 days
st1501	2	33 days
ProfServ VC Test	2	31 days
Smart Multimedia	4	29 days
Game Board	4	29 days
Slimline PC CASE	4	28 days
Hauptplatine M-3100	5	28 days
TMS Product Grade 1000	1	26 days
Wave Pick Item 8	13	25 days
ewff	2	25 days
Consulting: Junior Manager	9	23 days
Consulting - Technical Lead	15	23 days
Create w/ Internal Order	1	22 days
/ *Trip from 05/02/05 To 05/0...	4	21 days
Festplatte	5	21 days
Implementation Project	3	20 days

## Functions in Celonis4:

- ✓ Now you have created an OLAP Table to drill down the throughput times of single articles
- ✓ To sort for the longest throughput time, drag and drop your throughput time KPI to the sorting field
- ✓ Change the sorting direction by clicking on the sort symbol of the KPI

## Selections in Components:

83k of 83k cases selected | 100% | Keep selection? 16 values selected | Edit | Publish

Item	Case Count	Duration
describe	2	104 days
Norm Abram	6	96 days
Cardiodyn 5 ml	4	66 days
RR-FG318	4	66 days
Routine work	9	40 days
Palm V Organizer	10	38 days
PHASE 1: Mobilization (Mile...	4	38 days
Turbinenanlage	1	38 days
Easy Pixel	3	36 days
Rotbandmargarine	9	35 days
test2	2	35 days
CITTA	3	34 days
Scaahedule 2a Drug	4	34 days
Project Management	3	33 days
st1501	2	33 days
ProfServ VC Test	2	31 days
Smart Multimedia	4	29 days
Game Board	4	29 days
Slimline PC CASE	4	28 days
Hauptplatine M-3100	5	28 days
TMS Product Grade 1000	1	26 days
Wave Pick Item 8	13	25 days
ewff	2	25 days
Consulting: Junior Manager	9	23 days
Consulting - Technical Lead	15	22 days
Create w/ Internal Order	1	22 days
/ *Trip from 05/02/05 To 05/0...	4	21 days
Festplatte	5	21 days
Implementation Project	3	20 days

Component options

General Options

Table title

Component type: OLAP Table

DIMENSIONS

ARKTX

KPIs

Case Count

Throughput Time

SORTING

Throughput Time

ADVANCED OPTIONS

Distinct values

Allow multiple columns sorting

Component is not filtered with selections

Disable Selections

Scroll horizontal

Done

- ✓ You can create selections directly in your analysis to filter your process
- ✓ Make sure to exit the edit mode with the toggle switch at the top
- ✓ Select all articles in your OLAP Table with a throughput time longer than 30 days
- ✓ Now the whole analysis is updated to this selection instantly
- ✓ Selections are displayed as tabs over the Analysis sheets
- ✓ To lock in the selection, confirm it by clicking on the green tick at the tab or at the component
- ✓ In the same way, you can filter from any chart or table

# Selections

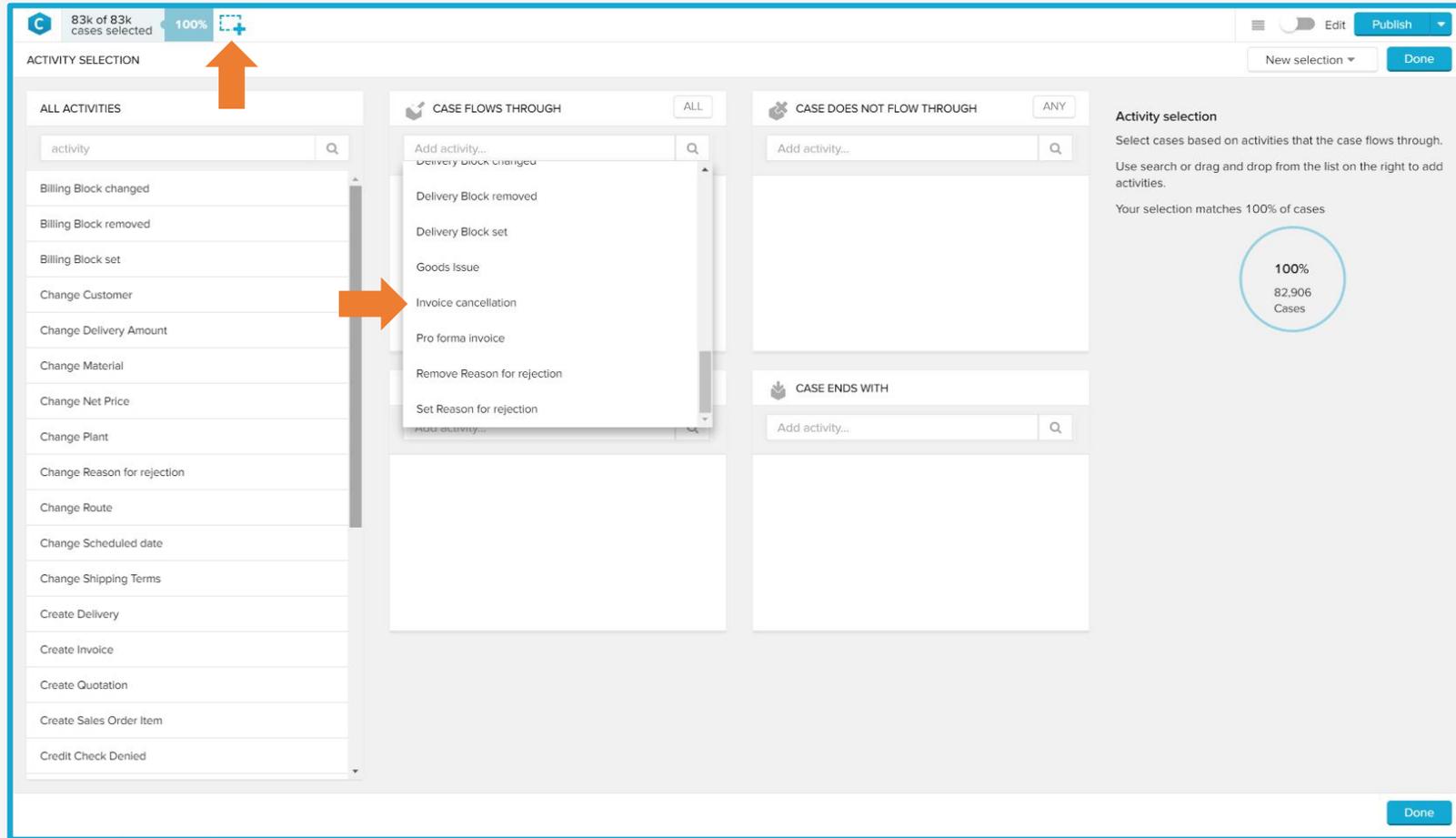
The screenshot displays the Celonis software interface. On the left, a process flow diagram shows steps: Process Start (68), Create Sales Order Item (68), Create Delivery (23), Goods Issue (51), Pro forma invoice (28), Create Invoice (67), and Process End (68). An orange arrow points to a close button (X) in the top right corner of the process flow area. In the center, a table displays data for 'ARKTX' with columns for Case Count and Throughput Time. On the right, the 'Component options' panel is visible, showing various settings for the table component.

ARKTX	Case Count	Throughput Time
describe	2	104 days
Norm Abram	6	96 days
Cardiodyn 5 ml	4	66 days
RR-FG318	4	66 days
Routine work	9	40 days
PHASE 1: Mobilization (Mile...	4	38 days
Palm V Organizer	10	38 days
Turbinenanlage	1	38 days
Easy Pixel	3	36 days
Rotbandmargarine	9	35 days
test2	2	35 days
CITTA	3	34 days
Scaahedule 2a Drug	4	34 days
Project Management	3	33 days
st1501	2	33 days
ProfServ VC Test	2	31 days

## Delete Selections:

- ✓ To delete a selection, click on the close button at the corresponding tab
- ✓ Delete the selection of ARKTX

# Selections



## Selections in Selection UI:

- ✓ The second way to manually filter your analysis is to use the selections UI
- ✓ To enter the selections UI, click on the plus button next to the case overview in the upper left corner
- ✓ Choose the activities selection
- ✓ Click on the text box of 'Case Flows Through' and select the activity 'Invoice cancellation'
- ✓ Confirm with 'DONE'
- ✓ Now you have implemented an activity selection including all cases with the activity 'Invoice cancellation'

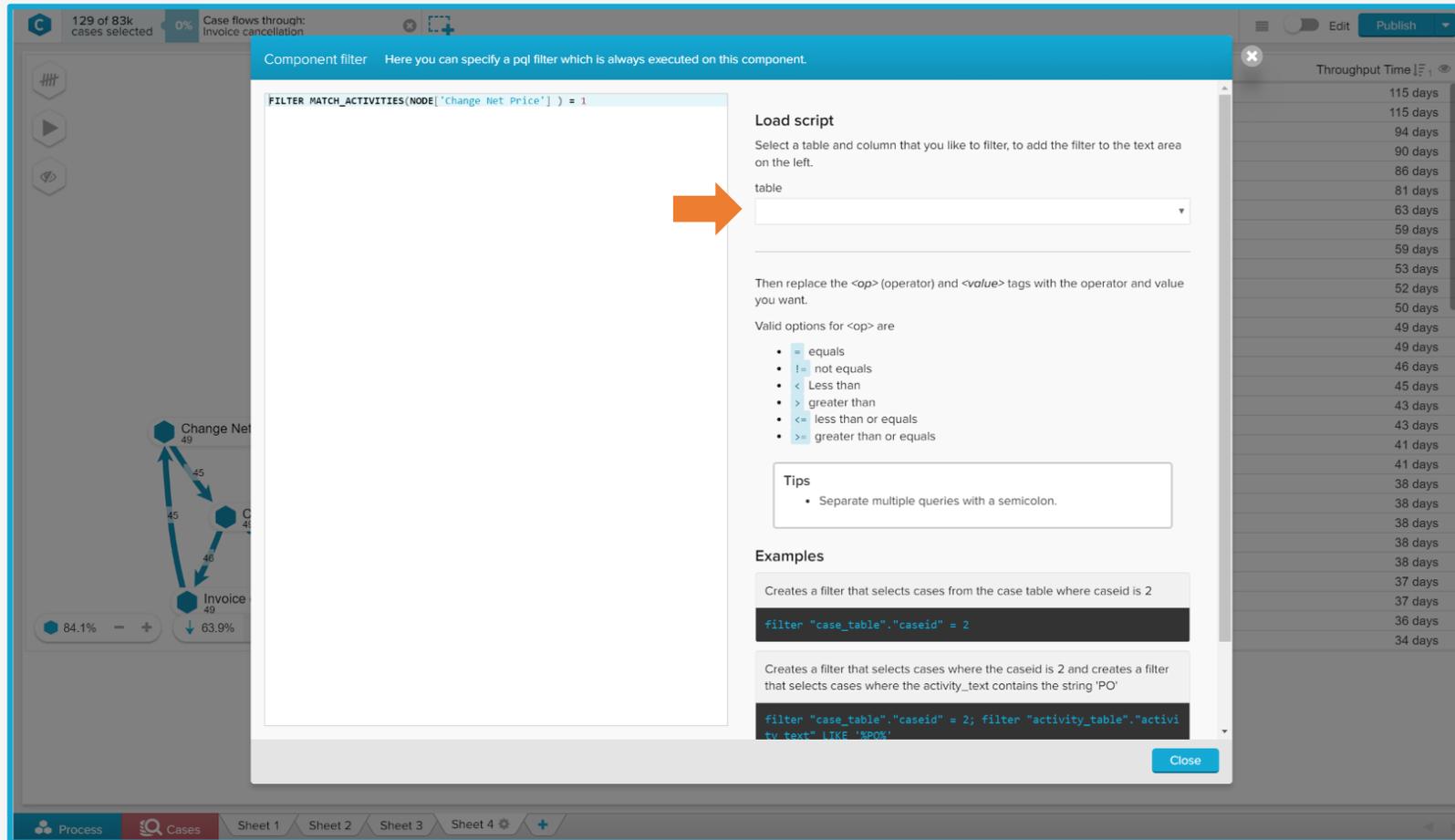
## Component Filters:

- ✓ Filters can also be set for single components
- ✓ Right click on the OLAP Table
- ✓ Click on 'Component Filter'
- ✓ Now you can put in a filter formula
- ✓ You now want to filter for all cases with 'Change Net Price'
- ✓ To do so, you have to set the following filter:

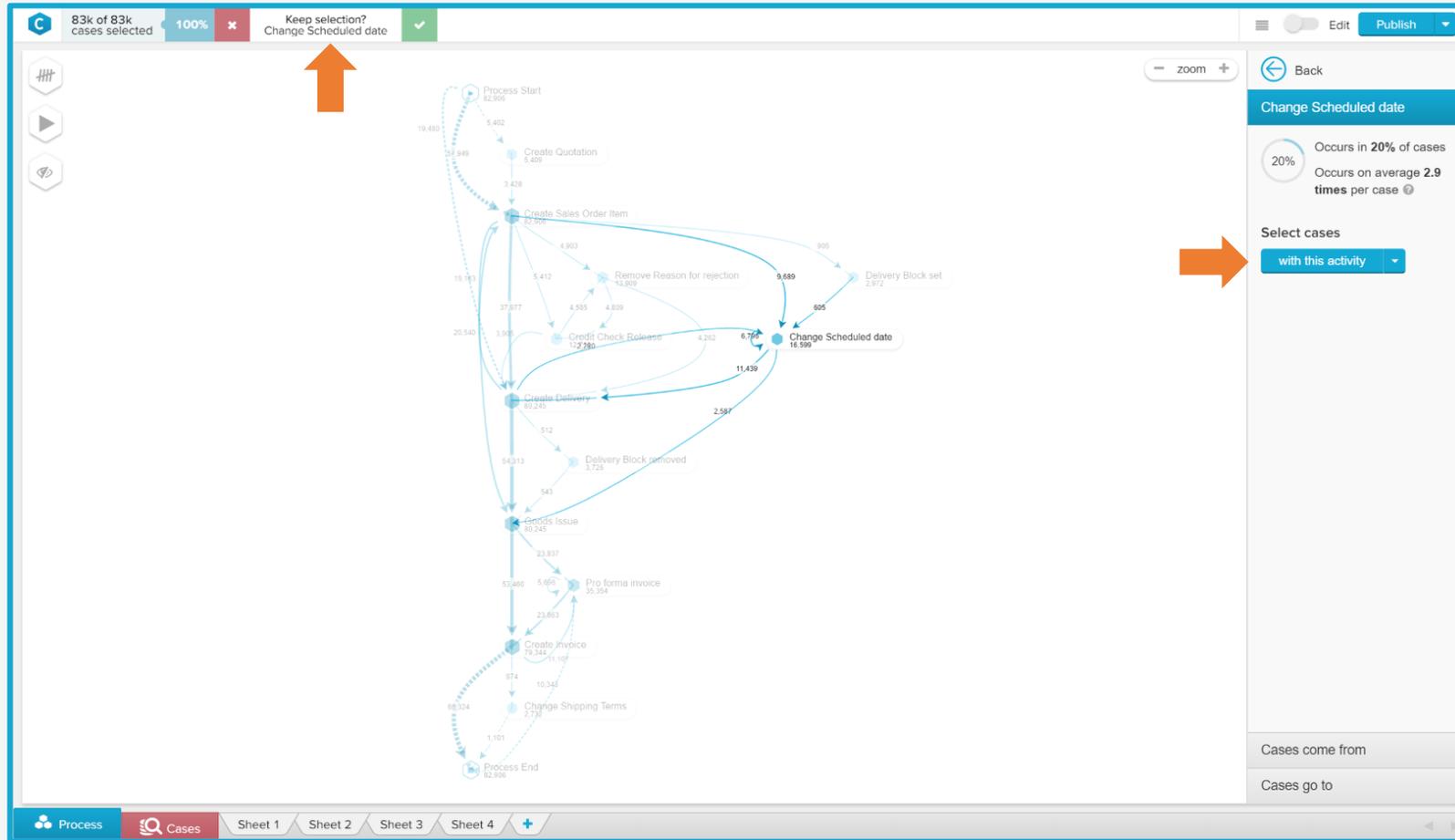
`FILTER MATCH_ACTIVITIES (NODE['Change Net Price'] ) = 1`

- ✓ The OLAP Table is now filtered to display only cases with a change of the net price

- ✓ In the same way, filters for sheets and whole analyses can be set in their settings load scripts



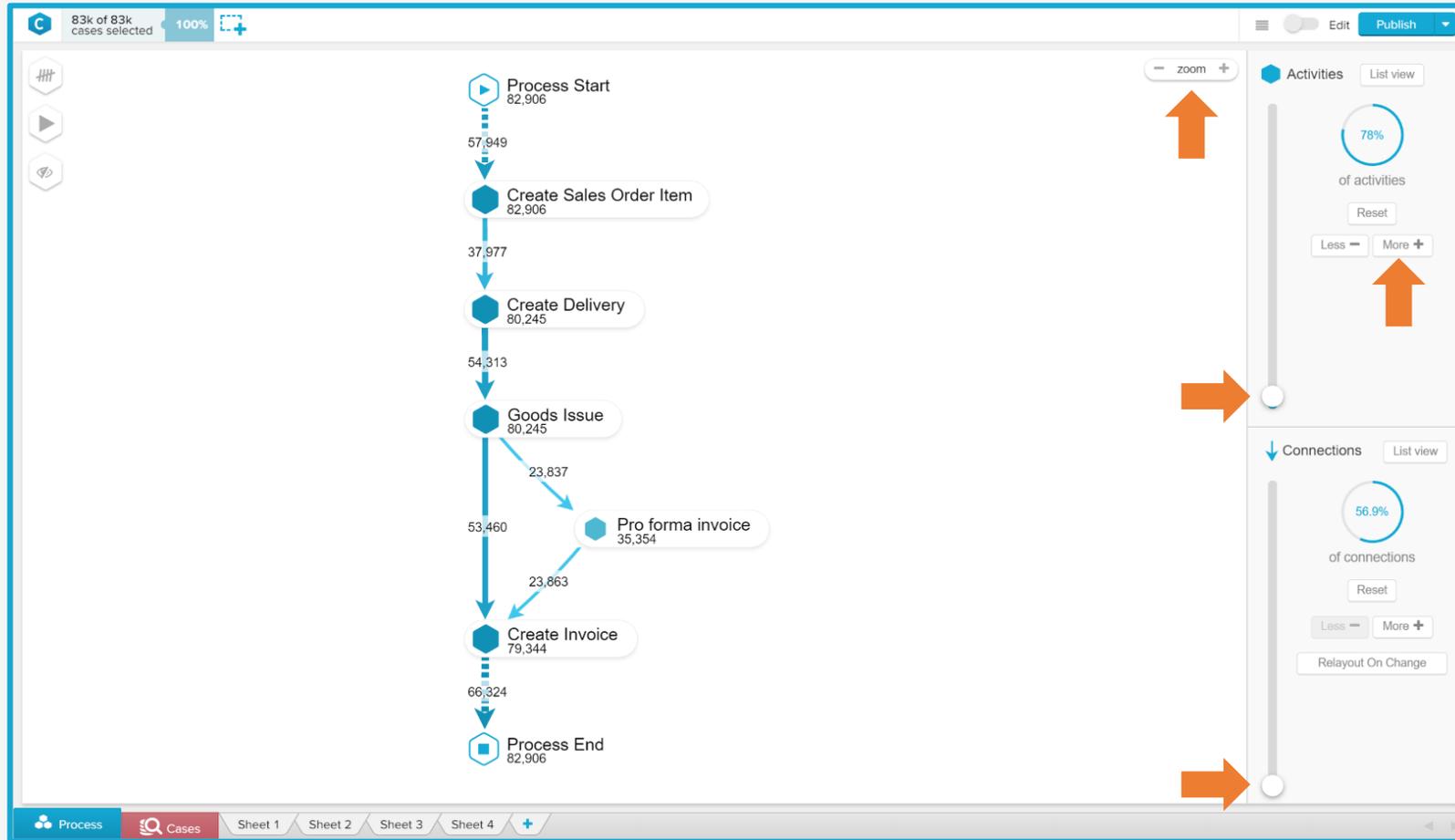
# The Process Explorer



## Navigate in the PE:

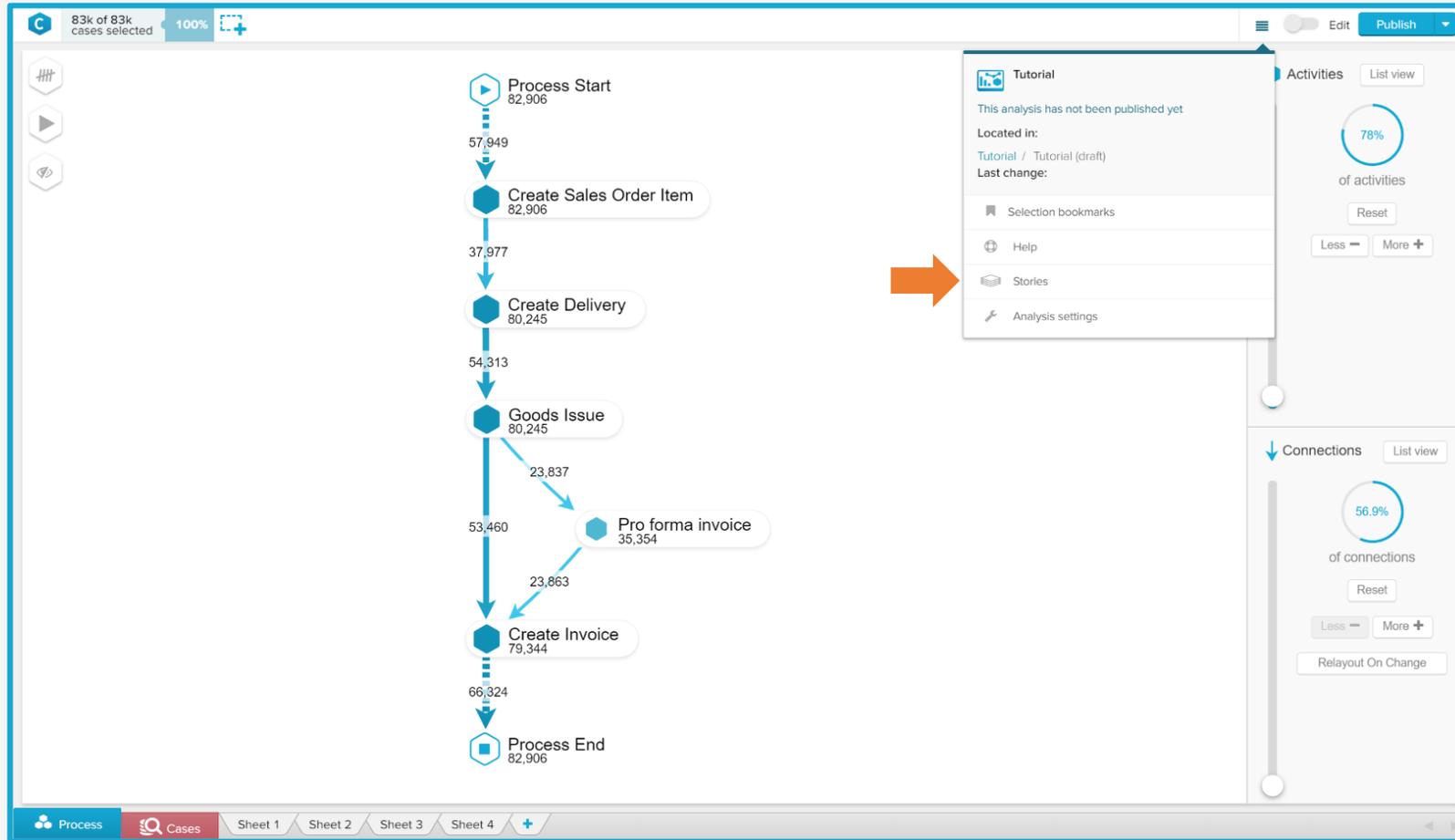
- ✓ Change to the Process Explorer by clicking on the tab at the bottom left
- ✓ Now you are in the Process Explorer view
- ✓ The selections are applied here as well. Delete all selections to view all cases
- ✓ To filter from the Process Explorer click on single nodes
- ✓ You can now filter to include or exclude the activity
- ✓ This selections can be locked in with the tick at the top the same way you confirm selections from other components

# The Process Explorer



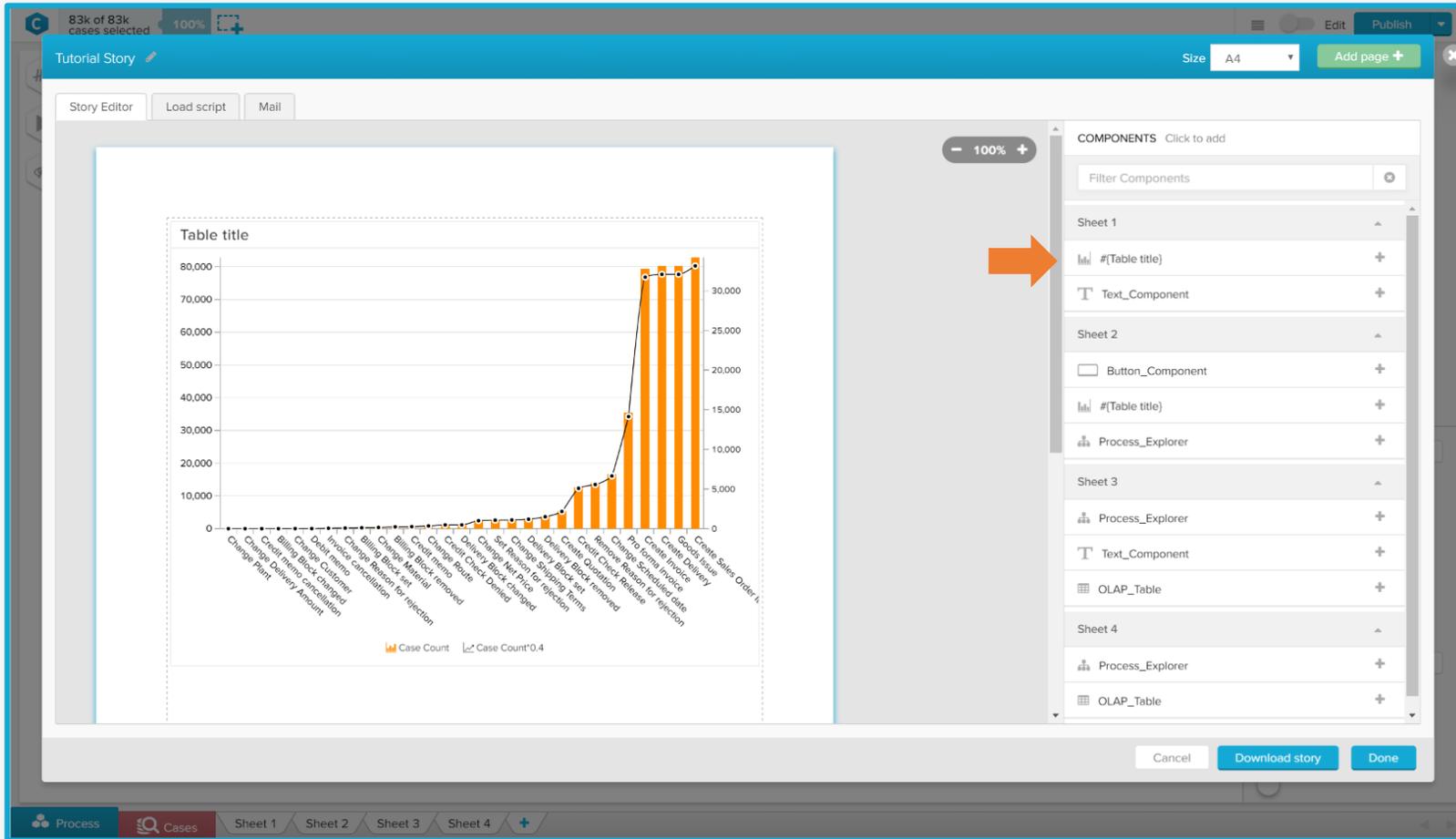
## Navigate in the PE:

- ✓ Move the activities slider to the bottom to view only the most occurring activities
- ✓ You can show the next most often occurring activity by clicking on the plus button of the activities
- ✓ The same way connections can be displayed or hidden on the connections tab
- ✓ To zoom in the PE, you can use the plus and minus buttons in the canvas or simply use your mouse wheel
- ✓ You can choose, if the connections are displayed in airplane mode or included in the layout of the graph



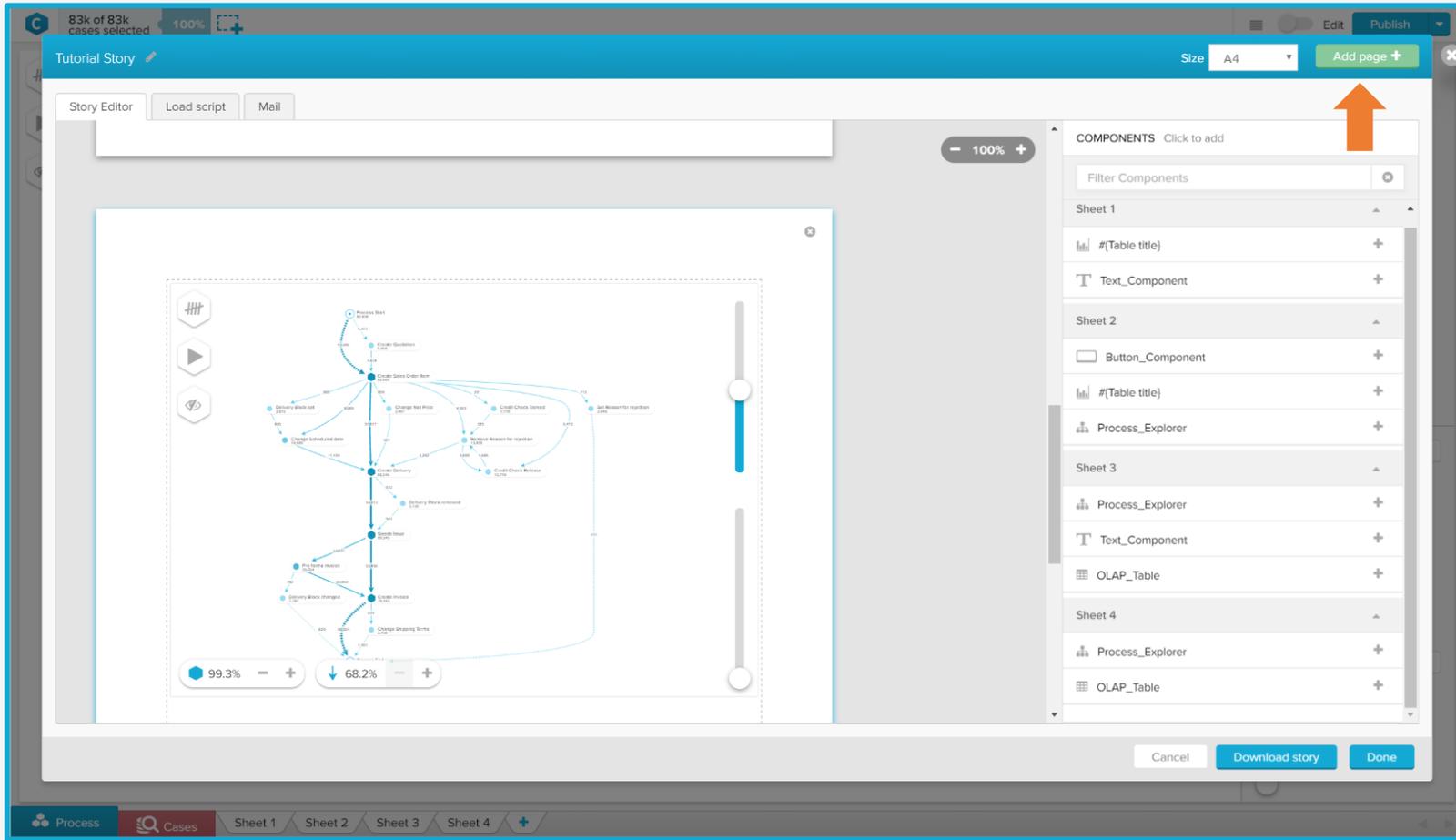
## Create a Story:

- ✓ The stories can be used to easily create presentations and PDF documents to export components from your analysis
- ✓ To open the stories UI, click on the settings button at the top right and choose 'Stories' in the dropdown



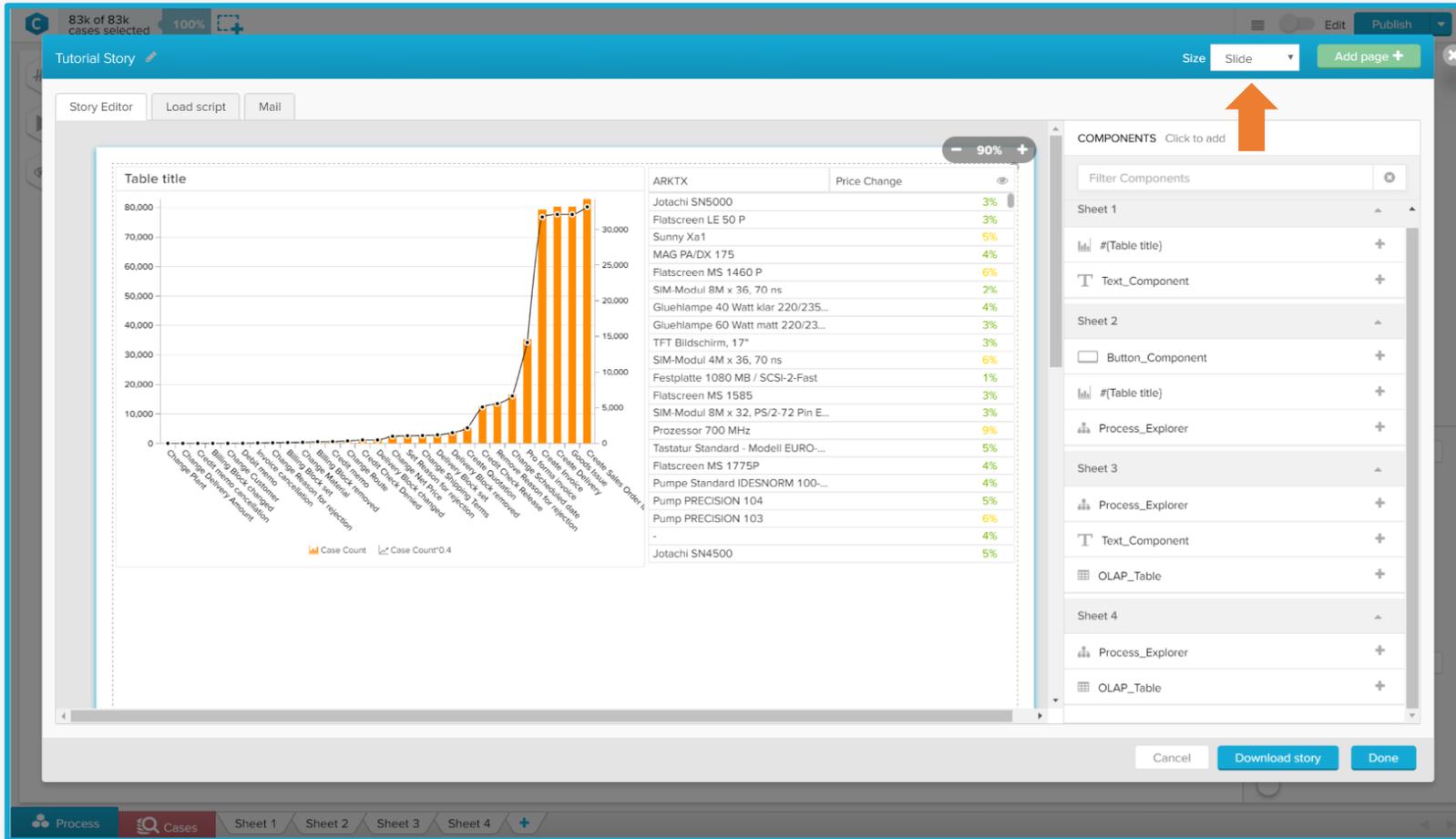
## Create a Story:

- ✓ Click on 'New Story' to create a new story
- ✓ Name your story by clicking on the pencil-icon on the top left
- ✓ Now you can access all your analysis' components on the right side grouped by sheets
- ✓ To add a component to your story, click on the page where you want to add it and afterwards click on the component in the list
- ✓ The component is added to the top left of the selected sheet and can be arranged and resized now



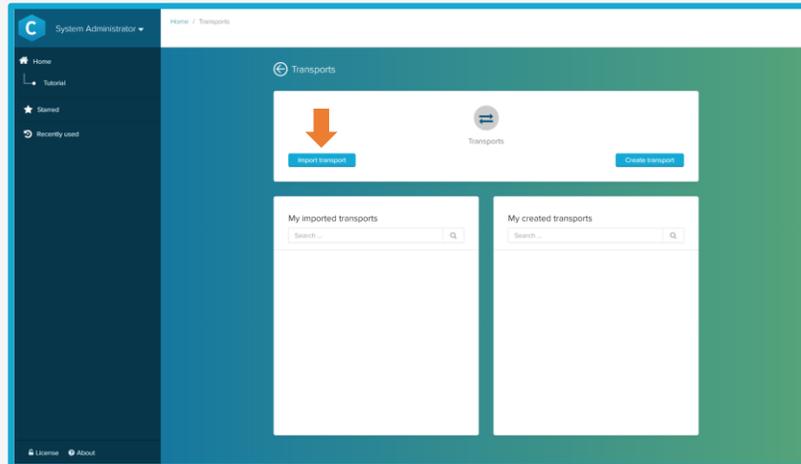
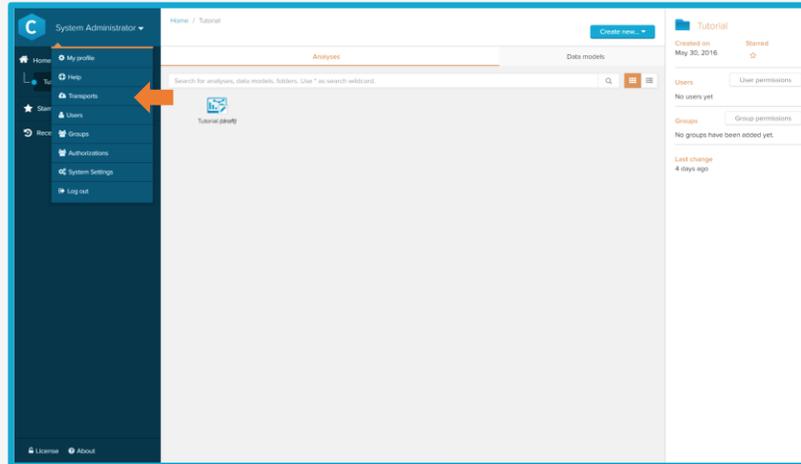
## Add Pages to Your Story:

- ✓ You can add more pages to your story by clicking on the 'Add Page' button at the top
- ✓ Remember to select the page you want to insert the components to
- ✓ To move components between pages you can use the arrow icons at the top right of every component



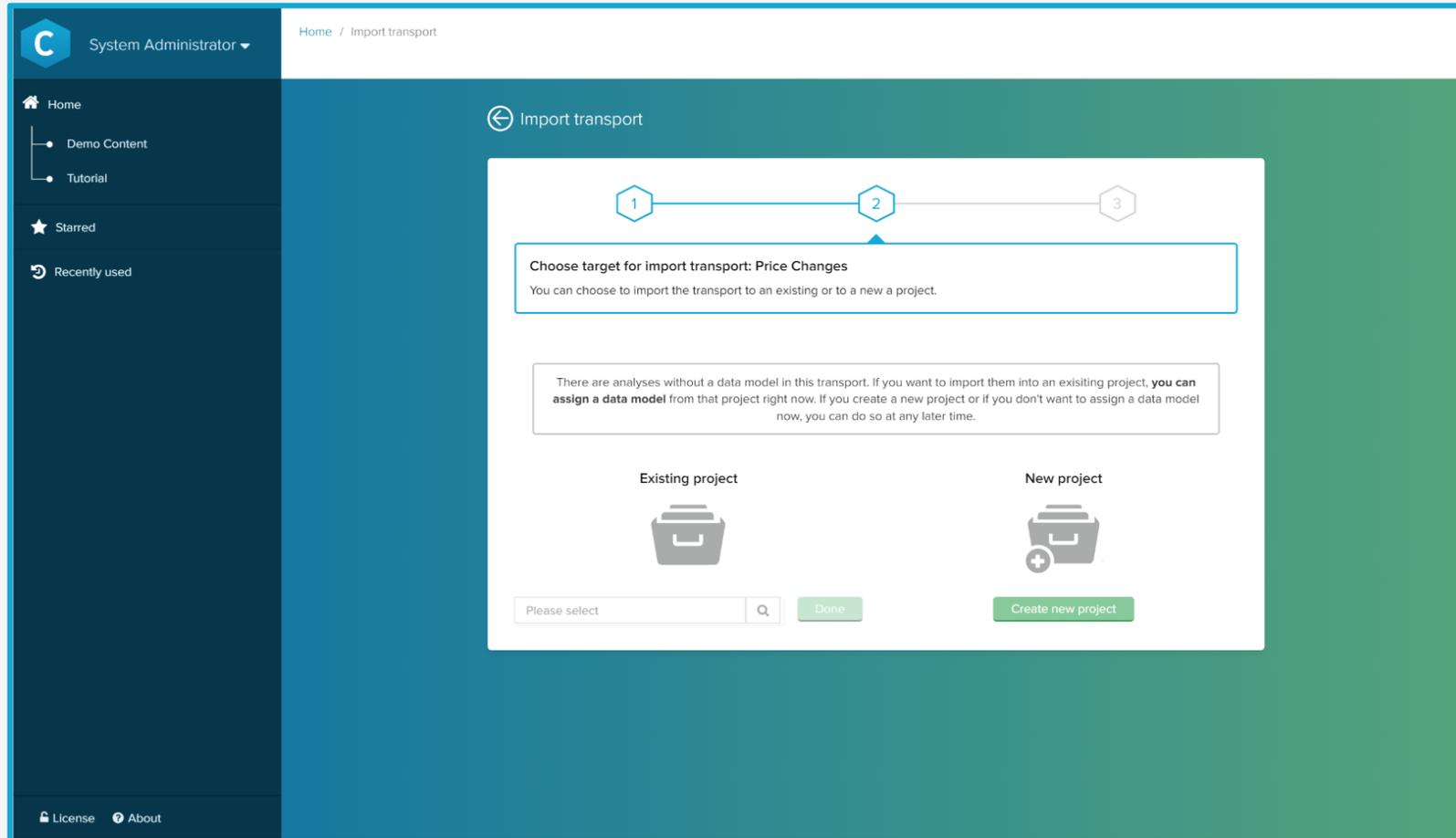
## Change Story Layout:

- ✓ Finally you can also change the layout of your story
- ✓ To create presentations you can switch to a slide layout
  - To do so, use the dropdown at the top right
- ✓ Be careful as the change of the layout will restructure your components
- ✓ You can also download the story directly or send it via email.



## Import Demo Content:

- ✓ Leave the story mode by analysis by clicking Done and go back to the home screen by clicking on the C – logo
- ✓ Open the transport section over the top navigation at the top left of the homescreen
- ✓ Choose import transport and upload the demo content



## Import Demo Content:

- ✓ You can either select an existing project to save the transport in or create a new one
- ✓ When you have selected the target project you have to wait 1-2 seconds until the transport is imported
- ✓ When the transport is installed in the project you can open it by clicking on the project's name

**Now you are able to find out what really  
happens in your processes.  
Time to Mine your own data!**

