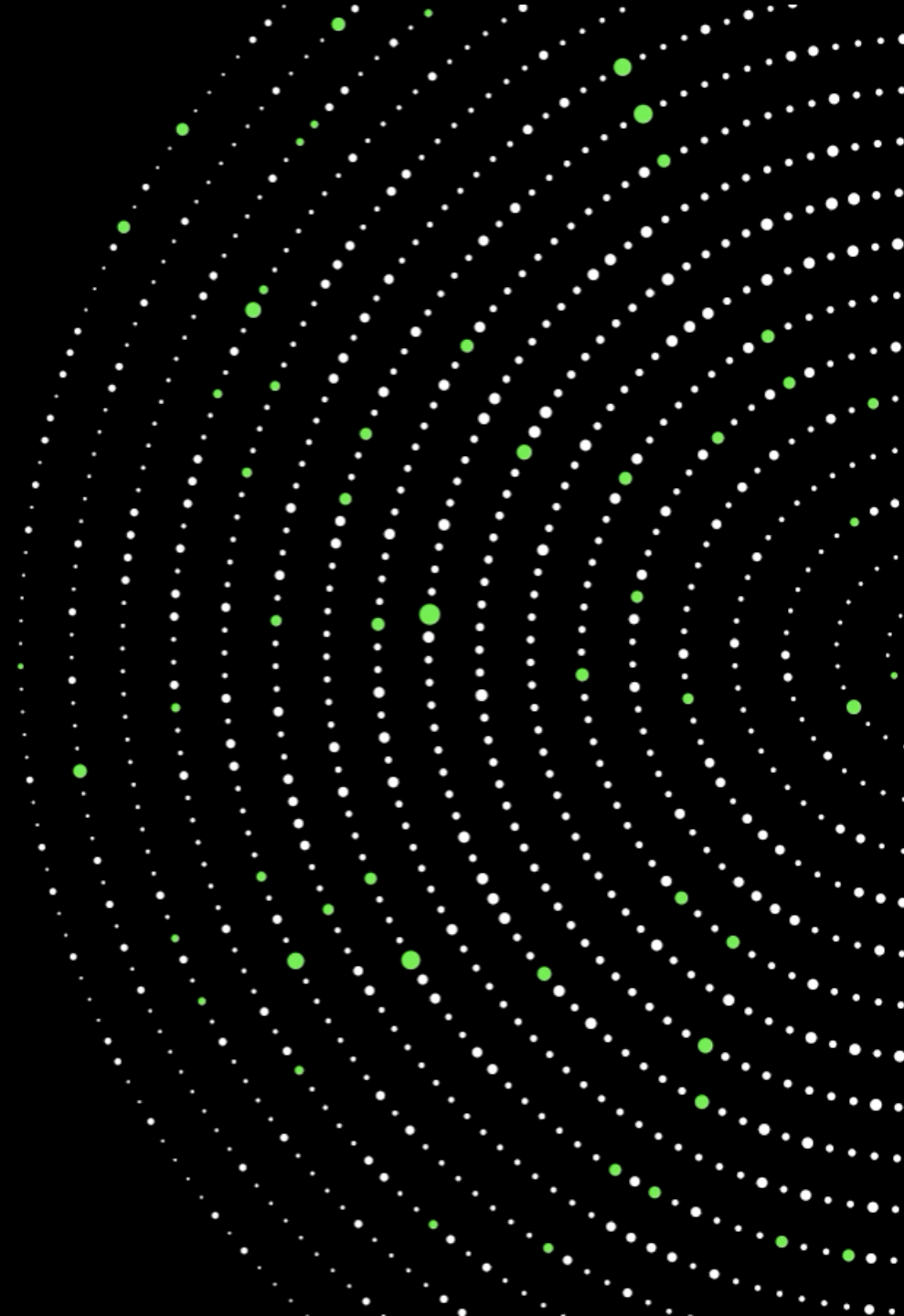


# Celonis Process Navigator

Quick Guide

March 2024



# Topics



## Open processes

---

- Search
- My overview
- Analyses
- Subscriptions

## Understand the process

---

- Process graphic
- Process flow - Details

## Configure the Process Navigator

---

- As admin
  - Navigation slider
  - Welcome area
- As Operations

# Topics



## Open processes

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- Search
- My overview
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## Understand the process

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- Process graphic
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## Configure the Process Navigator

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# Open Processes Search



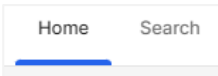
## STEP 1

### Select Process Navigator

Open Business Navigator

Familiarise yourself with the home page > Divide the page into header and sections (eg. My overview)

Navigate to the central main search in the header bar



## STEP 2

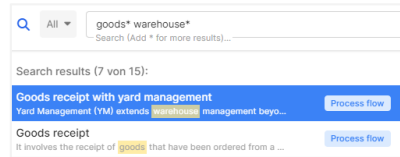
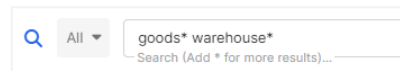
### Enter search term

Enter term in header (operators: \*; and; or)

Move the mouse pointer over the search results to get a preview on the left side of the dialogue

Optional: Open search result directly with a mouse click (continue with 4)

Select all results" button  
Cancel dialogue with "Esc" button or "ESC" button



Show all results (15)

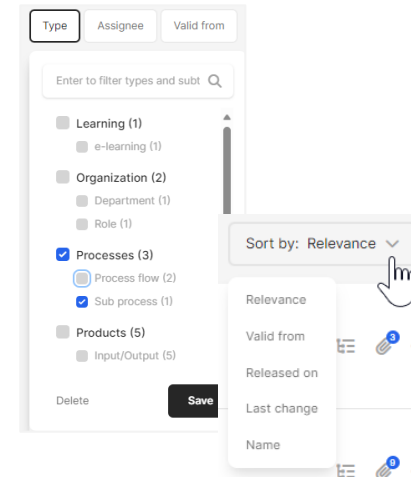
## STEP 3

### Filter & sort search results

Search results can be further filtered by type, responsible person and valid from.

Sorting according to various criteria is possible.

Search results can be opened directly with a click.



## STEP 4

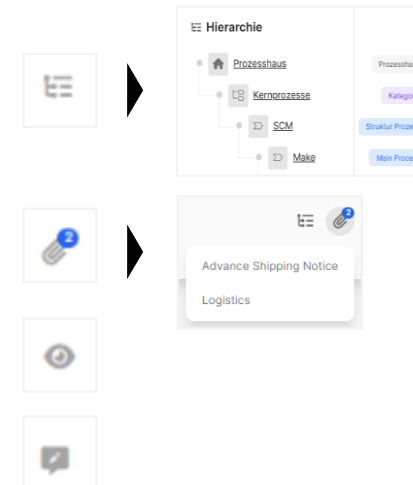
### Use search results

Hierarchy icon: Jump to higher-level objects

Attachments icon: List attachments and open if required

Favourites can be set with the "eyes" icon > Selection of a group possible

Enquiries can be started with the corresponding icon



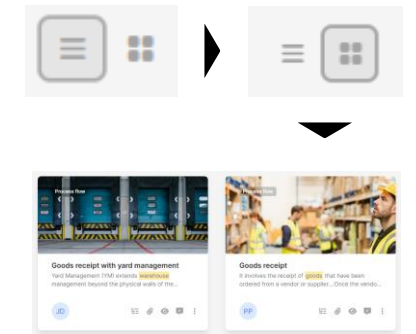
## STEP 5

### Change search result display

Switch from list display to tile display possible.

Icons can be used in a similar way to the list view.

Open the object by clicking on the corresponding tile.



# My overview



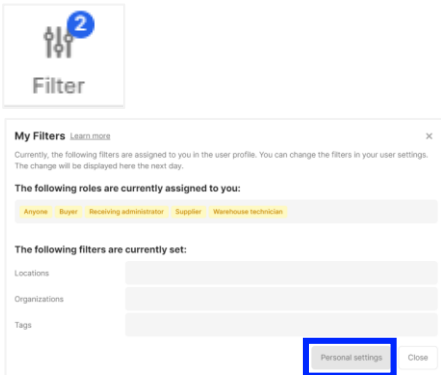
STEP 1

## Verify my filter

Select the 'My filters' button in the header bar.

Check whether you have set relevant filter characteristics, e.g. roles.

To set these filter characteristics, select 'Personal settings' > Jump to Business Manager (now Process Designer).



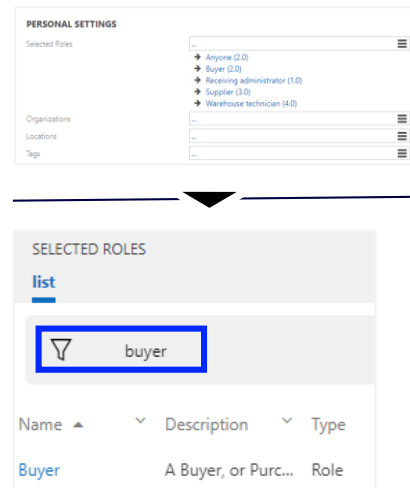
STEP 2

## Specify my filter

Select the corresponding field for which you want to enter/select a filter characteristic.

Select a value or enter a value.

Close the window > Note: Temporary: Changes only visible in the BN the next day.



STEP 3

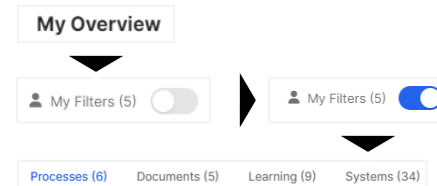
## Activate my filter

Navigate to the 'My overview' section.

Activate 'My filters'

You can restrict the object types using the tabs.

Optional: The displayed objects can be opened directly from the list by clicking on them.



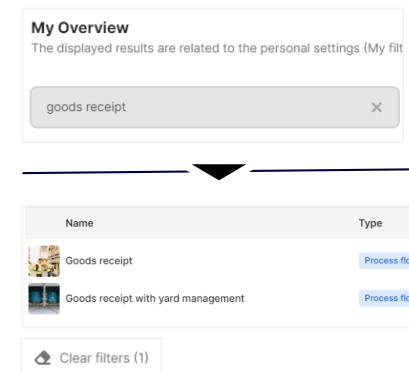
STEP 4

## Filter results further

The results of the objects can be further restricted with a search term.

Further filtering by 'Type', 'Assignee' and 'Valid from' is possible.

Further filters can be reset with 'Clear filters'.



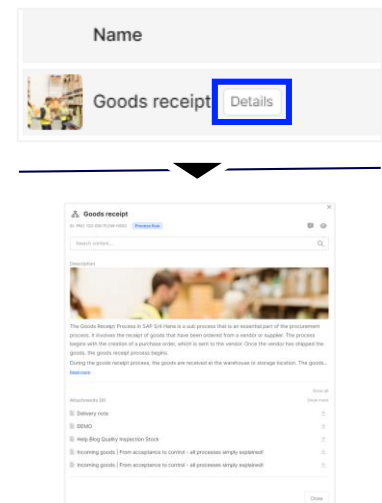
STEP 5

## Utilize results

If you move the mouse over a filter result, a 'Details' button becomes visible.

Click to open a dialogue to verify whether it is the object you are looking for > close the dialogue.

Open the object by clicking on the title of the search result.



# Open Processes Analysis



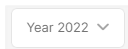
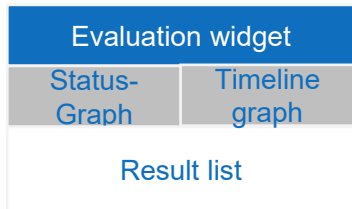
## STEP 1

### Widget analysis

Navigate to the "Analysis" widget on the home page.

Optional: Set 'My filters' to narrow down the search to your relevant filter criteria.

Assumption: Process has the status released and has been valid since November. Set the year for the filter



## STEP 2

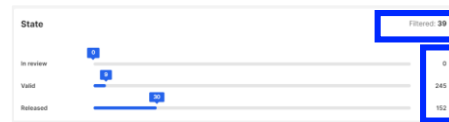
### Use status graph

Status graph: 0/245/152 shows the total quantity of objects (over all years).

The number 39 indicates the number of filtered elements.

The status (blue line with number display) can also be selected as a filter criterion > Deactivate either via "Delete filter" or activate the other two statuses by clicking on them.

The display of the timeline graph changes accordingly.

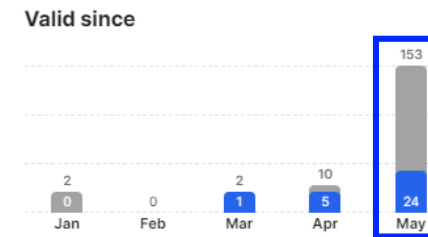


## STEP 3

### Use timeline graph

In May, 24 objects correspond to the previous filter criteria (e.g. year, my filters/search term/type/responsible person).

Clicking on the "May" bar restricts the search results to May of the previously selected year > 24 search results from a total of 153 objects are displayed.

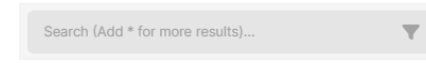
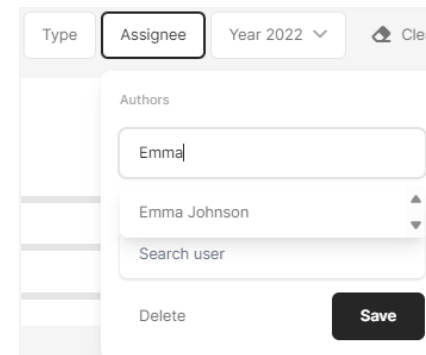


## STEP 4

### Search & more filters

In addition to filtering by type, there is also the option of filtering by responsible person > Responsible persons can be authors or persons responsible.

In addition to the year, a free text search is always possible via the corresponding field.



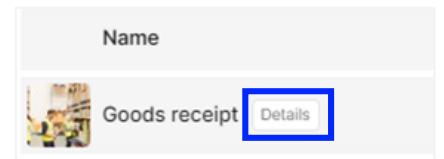
## STEP 5

### Utilize results

If you move the mouse over a filter result, a 'Details' button becomes visible.

Click to open a dialogue to verify whether it is the object you are looking for > close the dialogue.

Open the object by clicking on the title of the search result.



# Open Processes

# Subscriptions



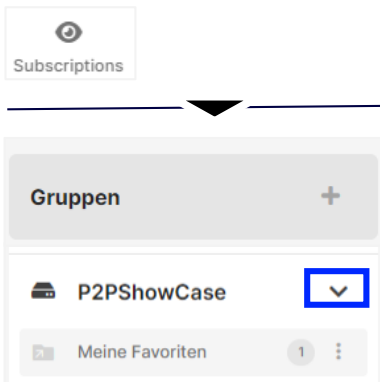
## STEP 1 - OPTION 1

### Open favourites - Header bar

The quickest way to open created favourites is via the corresponding button in the header bar.

Groups can be expanded directly in the drop-down menu using the arrow pointing downwards.

Click favourites entry to open.



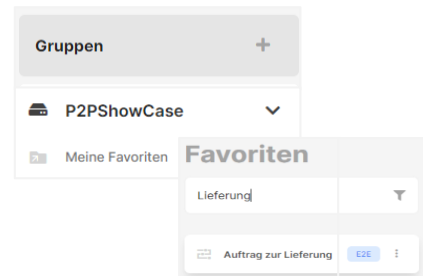
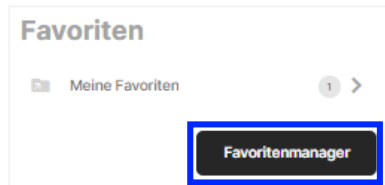
## STEP 1 - OPTION 2

### Open favourites - Favourites manager

Instead of opening the favourites directly, you can jump to the favourites manager.

Click on 'Favourites manager'.

Favourites are structured in databases (here P2PShowCase) and groups (here My Favourites).

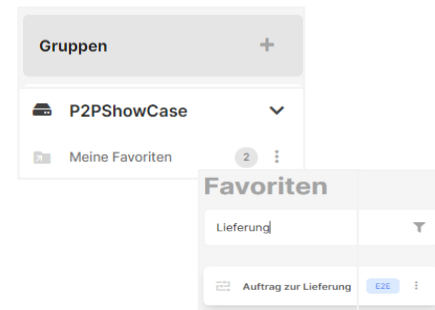
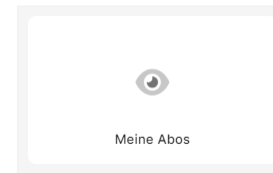


## STEP 1 - OPTION 3

### Open favourites - Link widget

You can press the corresponding button in the link widget to access the favourites manager.

Favourites are structured in databases (here P2PShowCase) and groups (here My Favourites).



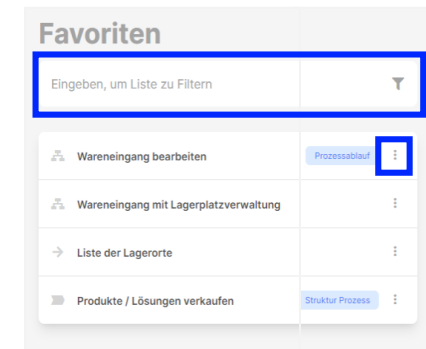
## STEP 2

### Using a group's favourites list

As soon as you have opened a group of favourites in the favourites manager, they are listed.

You can either open a favourite directly or search using the search field.

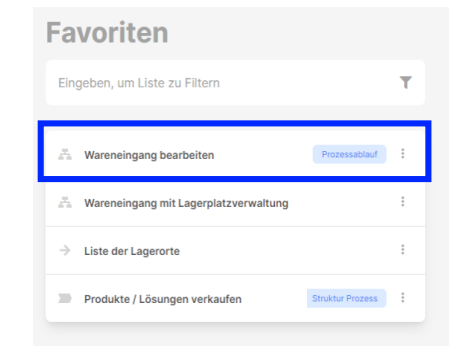
Note: the three-dot icon can be used to copy favourites, move them and change their order.

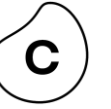


## STEP 3

### Open favourites

Favourite entries can be opened by clicking > here the process flow "Provide goods receipt".





Process Navigator

# Topics

## Open processes

---

- Search
- My overview
- Analyses
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## Understand the process

---

- Process graphic
- Process flow - Details

## Configure the Process Navigator

---

- As admin
  - Navigation slider
  - Welcome area
- As Operations



Understand the process

# Process graphic

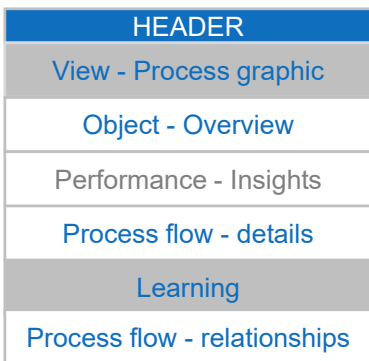


STEP 1

## Open process journal

In this example, we open an object of the 'Process goods receipt' sub-process type.

The associated process journal consists of various sections

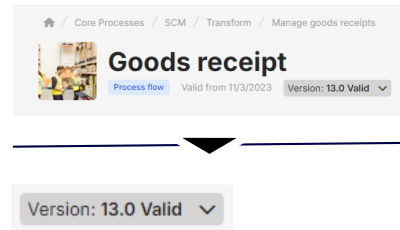


STEP 2

## Switch versions

The object name and further information are displayed in the view widget at the top.

At the bottom right next to the subprocess name, you can switch between 'Released' and 'Released and valid' versions, if available.

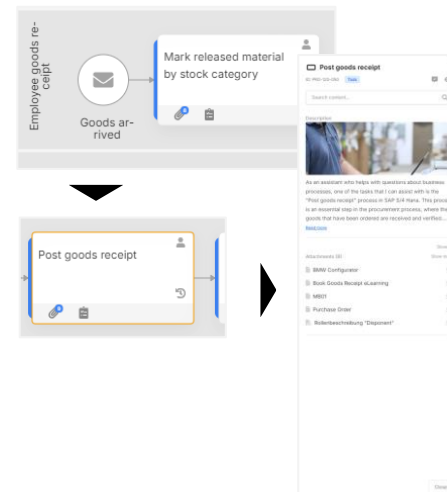


STEP 3

## Move graphic

The graphic can be moved across the screen by pressing the left mouse button and moving the mouse.

Task can be selected > a separate dialogue window with consolidated information appears.

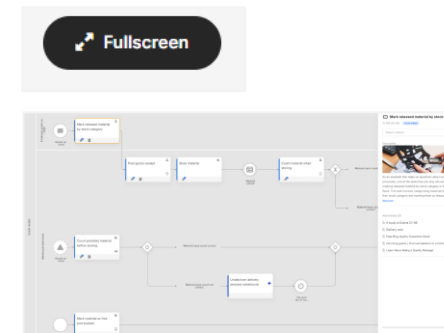


STEP 4

## Use graphics

Pressing the full screen button takes you to the corresponding full screen mode.

Individual tasks can be selected and task details can be viewed in the dialogue window.



STEP 5

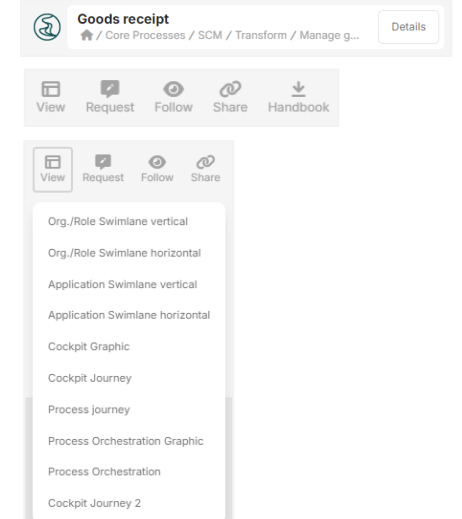
## Change view

Additional functions are displayed in the header in full-screen mode.

Details: The information on the process can be displayed.

View: Change possible. Horizontal / Vertical with / without swimlane

Manual: Download.



Understand the process

# Process flow - details



STEP 1

## Open process journal

In this example, we open an object of the 'Process goods receipt' sub-process type.

The associated process journal consists of various sections.

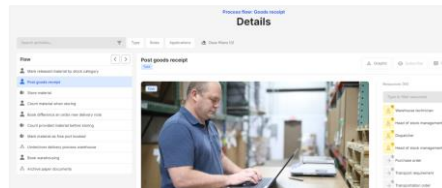
HEADER
View - Process graphic
Object - Overview
Performance - Insights
Process flow - details
Learning
Process flow - relationships

STEP 2

## Call up the process flow detail area

Navigate to the "Process flow - Details" area.

In this area, you have the option of stepping through the individual process activities without navigating in the flowchart.

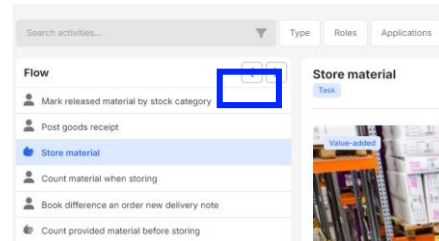


STEP 3

## Browse through process activities

The left/right arrows allow you to scroll through the process activities.

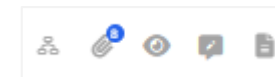
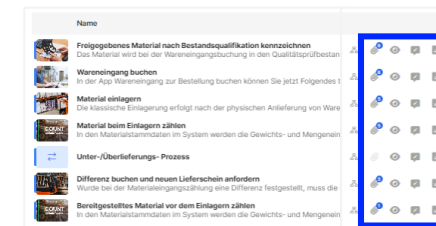
The currently "selected" process activity is displayed to the right of this (here: store material).



STEP 4

## Use the list of process activities

You can use the (unfiltered) process activity list directly to call up the element of interest to you or use the buttons to jump to the hierarchy, open attachments, set a subscription, create a request or view general version information.



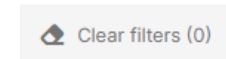
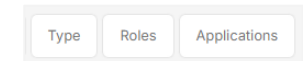
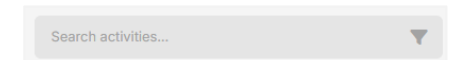
STEP 5

## Filter process activities

The process activities and their content can be filtered directly via the search field.

The characteristics type, roles and applications and their values are offered as filters.

The filter settings can be reset via „Clear filters“.



# Topics



## Open processes

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## Understand the process

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## Configure the Process Navigator

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- As admin
  - Navigation slider
  - Welcome area
- As Operations

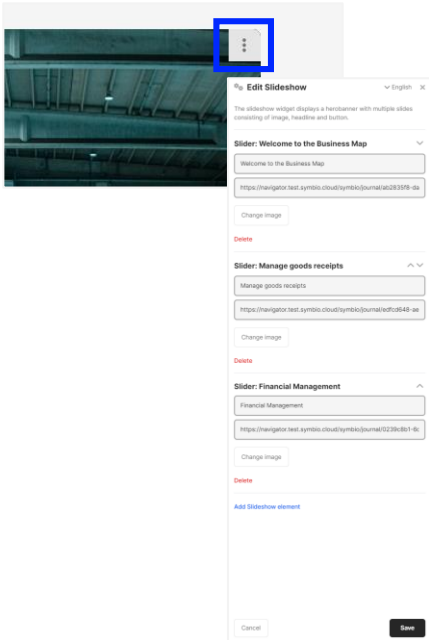
# Configure the Process Navigator – Admin

## Welcome area



### STEP 1

#### Select navigation slider



### STEP 2

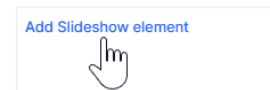
#### Create navigation slider element

New elements can be added.

The content of the text field is later placed in the centre of the image.

A link can be stored which is called up when the corresponding element in the slider is clicked on.

Image can be uploaded with "Change image".

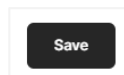


Slider: ^

The title of the Slideshow element

The URL of the Slideshow element

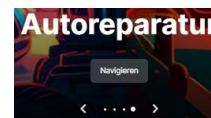
Change image



### STEP 3

#### Check navigation slider element

Individual elements can be deleted if required.

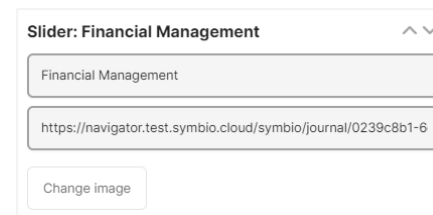


### STEP 4

#### Delete navigation slider element

Individual elements can be deleted if required.

To do this, press the "Delete" button under the corresponding entry.





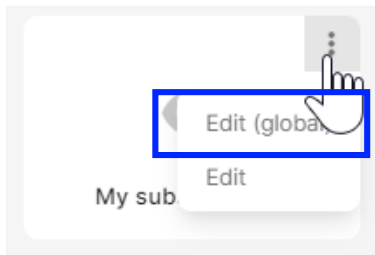
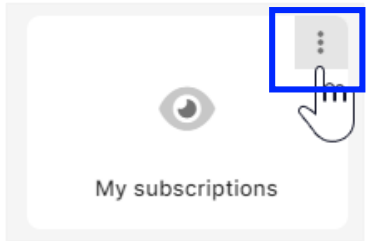
# Welcome area – Quicklink

## STEP 1

### Call up configuration

Navigate over a tile with the mouse > Select the three points.

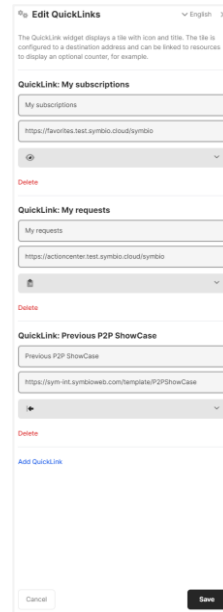
Select Edit (global).



## STEP 2

### Show configuration

All current QuickLinks and their parameters are listed (note: scrolling takes place via the thin scroll bar on the right-hand side of the dialogue edge).



## STEP 3

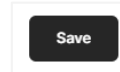
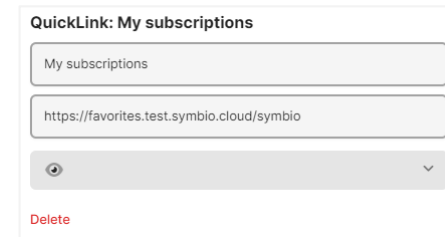
### Apply changes

Change names (e.g. here "My subscriptions").

Then adjust the link accordingly.

Select symbol from the list.

Press "Save".



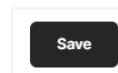
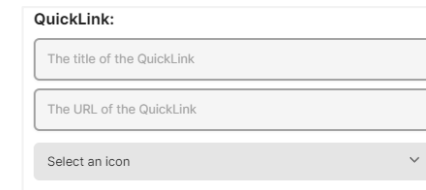
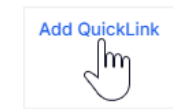
## STEP 4

### Add quicklinks

Press "Add QuickLink" at the bottom of the dialogue.

Fill in fields.

Save.

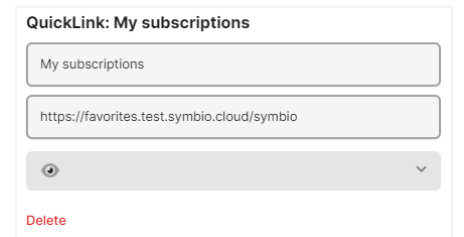


## STEP 5

### Delete quicklink

Scroll to the corresponding quicklink.

Press "Delete".



# Configure the Process Navigator – Operations

## Welcome area – Quicklink

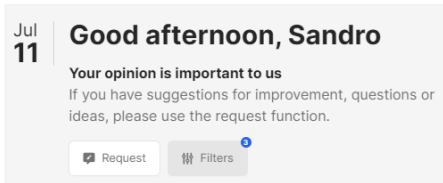


### STEP 1

#### Welcome area

The quickest way to open existing favorites is via the corresponding button in the header bar.

Groups can be opened directly in the drop-down menu using the arrow pointing downwards.



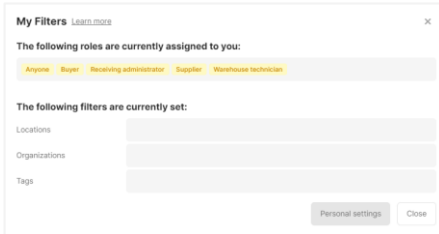
### STEP 2

#### Dialog - filter

Instead of opening the favorites directly, you can jump to the favorites manager.

Click on 'Favorites manager'.

Favorites are structured in databases (here P2PShowCase) and groups (here My favorites).

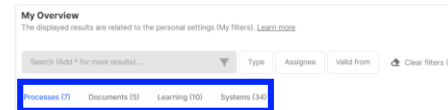


### STEP 3

#### My overview

In the link widget, you can press the corresponding button to access the favorites manager.

Favorites are categorized into databases (here P2PShowCase) and groups (here My favorites).



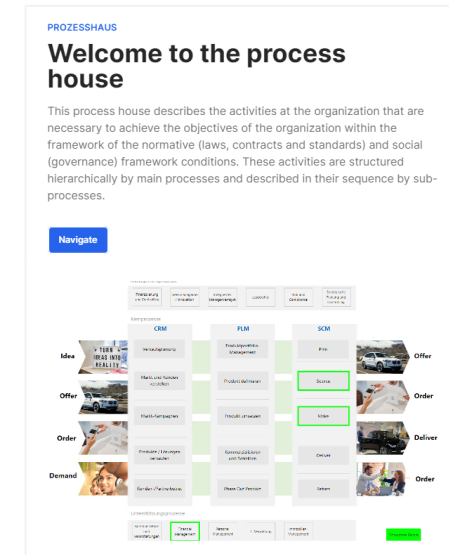
### STEP 4

#### Customised area

As soon as you have opened a group of favorites in the favorites manager, they are listed.

You can either open a favorite directly or search for it using the search field.

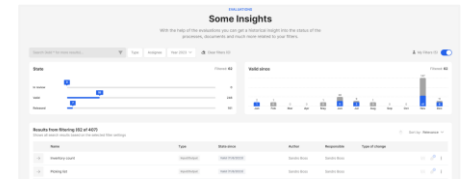
Note: you can use the three-dot icon to copy favorites, move them and change their order.



### STEP 5


#### Analysis area

Favorite entries can be opened by clicking > here the process flow "Provide goods receipt".





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Process  
Navigator 

## Learning videos

Get started 

Search for an  
object 

Explore the  
Process Journal  
of a  
Subprocess 

Submit a Request 

Manage Actions 