EMMA Analytics

User Guide – Prototype Test Environment

1. Purpose of This Guide

This user guide is designed to help you **test and experience** the EMMA Analytics prototype.

The goal of this test is to see how quickly and accurately EMMA can:

- **Retrieve data**
- Perform calculations
- **Generate charts**
- Send email reports

This is a **hands-on test**, not a production system and not a training course.

⚠ 2. What This Prototype Is (and Is Not)

EMMA Analytics is a **conversational analytics agent**.

In this prototype, you can ask EMMA questions about **workflow data** using natural language and receive:

- Direct answers
- Visual charts
- Email reports

Important clarifications:

- This is not a production system
- It does not connect to live enterprise data
- All data is **synthetic (MOC)** and provided for testing
- The purpose is to demonstrate **analytics interaction**, not full automation

3. Business Context: What Process This Data Represents

What Is SpiffWorkflow (in Simple Terms)

SpiffWorkflow is a system used to **manage and track approval workflows**.

In this example, it is used to represent the **manual journal entry approval process** managed by Global Financial Services (GFS).

This process happens before any journal entry is uploaded into Oracle.

The Journal Entry Approval Process (High Level)

Each **journal entry request** goes through steps such as:

- **Submission** by an employee
- Review by a supervisor or manager
- Approval or rejection

Each step generates **metadata** about how the process is executed.

This metadata is what EMMA Analytics uses.

4. What Data Is Available in This Prototype

The prototype uses a **PostgreSQL (SQL) database** containing **10,000 synthetic records**.

Each record represents a journal entry approval request and includes information such as:

- Employee (submitter)
- Supervisor or approver
- **Status** (approved, rejected, pending)
- Workflow stage
- **Dates and timestamps**
- Time spent in each stage
- Amount
- Organizational attributes (site, business unit, etc.)

EMMA can only answer questions based on this data.

5. Time Coverage and Key Assumptions

This is **very important** for using the prototype correctly.

The dataset covers a **fixed time period**:
September through December 2025

All questions should reference a time period, for example:

- A single month (e.g., October 2025)
- Multiple months (e.g., October–December 2025)
- The full period (September–December 2025)

If a question refers to a period outside this range, EMMA will say that the **data is not available**.

6. Asking Questions: Precision and How EMMA Helps

Be as Specific as You Can

The best results come from questions that clearly specify:

- **What you want to know**
- **The time period**
- The dimension (employee, supervisor, status, stage, etc.)

If Your Question Is Vague

EMMA is not rigid.

If your question is unclear or missing details, EMMA will:

- **Ask follow-up questions**
- Request clarification (for example, asking for a time period)

This is **expected behavior** and part of the design.

If the Data Does Not Exist

If you ask for information that is not in the database, EMMA will clearly say:

- That the **data does not exist**, or
- That the requested time period is outside the dataset

7. What This Test Is Really About

While EMMA can ask clarifying questions and explain data limits, that is not the **main purpose of this test**.

The main focus of testing is to see that:

- **Data retrieval is fast**
- **Calculations are accurate**
- Charts are precise
- Email reports are correctly generated

8. Accessing EMMA Analytics and the Data

From the web application, you can:

- Launch the **EMMA Analytics agent**
- Access the **full 10,000-record dataset**
- Provided as a downloadable file or data viewer

You are encouraged to **review the data directly**.

9. How to Test the Prototype (Required Sequence)

Please follow this **sequence exactly**.

Step 1: Ask a Question

Ask a specific analytics question, including a **time period**.

Example:

"How many journal entry requests were approved in October 2025?"

EMMA will return a **direct answer**.

Step 2: Request a Chart

After receiving the answer, ask EMMA to:

"Create a chart for this."

The chart will appear in the interface based on the **previous answer**.

Step 3: Request an Email Report

After the chart is created, ask EMMA to:

"Create a report and send it by email."

The report will include:

- The answer
- The chart
- Structured results

10. Sample Questions to Try

These questions are **aligned with the data** and guaranteed to work.

Volumes and Status

- "How many journal entry requests were submitted in October 2025?"
- "How many requests were pending approval in November 2025?"

Approvals and Rejections

- "What percentage of requests were rejected between September and December 2025?"
- "Which supervisors approved the most requests in December 2025?"

Time and Bottlenecks

- "What was the average approval time in November 2025?"
- "Which workflow stage took the longest on average in October 2025?"

People and Organization

- "Which employees submitted the most requests in September 2025?"
- "How did approval times differ by business unit between October and December 2025?"

11. How to Validate EMMA's Answers

You can validate EMMA's responses by:

- Opening the **provided dataset**
- **Filtering** by the same time period and fields
- Comparing counts, averages, and totals

This confirms that answers come **directly from the data**, not assumptions.

12. Known Limits of the Prototype

- Data is limited to **September–December 2025**
- Only **workflow metadata** is available
- No Oracle posting details
- No attachments or supporting documents

13. Closing Guidance

Use this prototype to:

- Ask **focused questions**
- See how quickly answers are returned
- Test **chart creation**
- Test **report generation**

The goal is to evaluate how well EMMA supports **fast, accurate analytics** over existing data.