

EMMA Finance

User Guide (Prototype)

1. Disclaimer

EMMA Finance is a **functional prototype**, not a production system.

This user guide is intended only for testing and feedback purposes. The system is provided to help users explore how an **AI voice assistant** could support Finance procedures.

Important notes:

- EMMA Finance does not connect to production Finance systems
- All SharePoint content accessed is part of a demo environment
- No confidential or real Finance data is used
- All users share the same demo SharePoint credentials
- The system has known limitations, which are documented in this guide
- The prototype is focused on Finance processes in Costa Rica

Please use EMMA Finance with the understanding that **behavior, performance, and capabilities** may change in future phases.

2. What Is EMMA Finance?

EMMA Finance is an **AI voice assistant** designed to support Finance team members while they work.

By default, EMMA speaks **Spanish (Costa Rica)** and interacts with you through two elements:

- A **voice interface**, where you speak with EMMA
- A **browser viewer**, where you can see what EMMA is navigating or reading

You can talk to EMMA naturally and watch her work in real time.

What EMMA Finance Does

EMMA Finance can:

- Answer questions about **Finance procedures** using SharePoint content
- Read **SharePoint documents** together with you
- Browse websites and SharePoint pages
- Guide you **step by step** through Finance procedures

3. Getting Started

What You Need

Before starting, make sure you have:

- A modern web browser (**Chrome, Edge, or Firefox**)
- A **working microphone**

- A stable internet connection
- Two browser windows or tabs available

Two-Step Connection Process

STEP 1: Open EMMA's Browser

- Click "CONNECT TO EMMA FINANCE BROWSER"
- A new tab opens at: <https://emma-finance.fly.dev/vnc.html>
- You will see EMMA's live browser view (noVNC window)
- Keep this window open and visible

STEP 2: Start the Call

- Return to the main EMMA Finance window
- Click "START CALL"
- Grant microphone permission if prompted
- Wait for EMMA's greeting
- Begin speaking when ready

Recommended Window Setup

- Place the **browser viewer** on the left
- Place the **voice interface** on the right

This allows you to see what EMMA is doing while you speak.

Demo SharePoint Access (Important)

You will need **demo credentials** when opening SharePoint documents.

Demo SharePoint Credentials (All Users):

URL: https://relaxing1978.sharepoint.com

Email: emersondemo@Relaxing1978.onmicrosoft.com

Password: Emerson26

Important points:

- This is a demo account, not production SharePoint
- All users share the same credentials
- Login is required the first time you open a SharePoint PDF
- Once logged in, it usually works for the rest of the session

How to Enter Credentials in the noVNC Browser

Method 1: Using Portapapeles (Recommended)

1. • Copy the credentials from this guide (Ctrl+C)
2. • Click "Portapapeles" in the left menu of the noVNC window
3. • Paste into Portapapeles (Ctrl+V)
4. • Copy again from Portapapeles
5. • Paste into the SharePoint login fields

Why this is needed:

noVNC does not support direct pasting from your local clipboard.

Portapapeles acts as a bridge.

Method 2: Type Letter by Letter

- Type each character manually
- For capital letters, use Shift + letter

Example:

"Emerson26" → Shift+E, m, e, r, s, o, n, 2, 6

EMMA's First Greeting

When the call starts, EMMA will say:

"Hola, soy EMMA, tu asistente virtual del equipo de Finanzas de Emerson.

Mi función es apoyarte para comprender y ejecutar los procedimientos del área de finanzas de la mejor manera posible.

Tengo tres capacidades básicas: responder preguntas sobre procedimientos, navegar a sitios web y visualizar información, y ejecutar tareas de navegación como hacer clic y completar formularios.

Para servirte mejor: ¿quieres que te ayude con preguntas o navegación general, o que te apoye a ejecutar un procedimiento específico?"

You choose how to proceed.

> 4. Two Ways to Use EMMA

At the beginning, EMMA will ask how you want help.

Option 1: Basic Mode

("preguntas o navegación general")

Use this mode for:

- **Quick Finance questions**
- Looking up information in SharePoint
- **General navigation**

Example:

"Tengo una pregunta sobre Cash Applications"

EMMA searches the knowledge base and provides an answer with a SharePoint link.

Option 2: Procedure Mode

("ejecutar un procedimiento específico")

Use this mode for:

- **Step-by-step guidance** through Finance procedures
- **Collaborative document reading**

How it works:

- EMMA shows a list of available procedures in the chat
- You select a procedure by name or number
- EMMA shares the SharePoint link
- You open the link and EMMA guides you step by step

Examples:

FIN-014 (Brasil)

FIN-034 (LATAM Cash Application)

FIN-021 (Noetix Report)

Important:

EMMA can see one screen at a time. You scroll through documents

together.

5. Practical Workflows

These workflows are based on **actual testing**.

Workflow 1: Ask a Finance Question

Example:

- **User:** "¿Cuál es la frecuencia del proceso de Brasil?"
- EMMA searches the knowledge base
- **EMMA:** "La frecuencia mencionada en el documento es diaria"
- EMMA provides a SharePoint link in chat

When to use:

Quick factual questions about procedures.

Workflow 2: Read a SharePoint Document

Example:

- **User:** "Vamos a [SharePoint URL]"
- **EMMA:** "La página requiere iniciar sesión"
- User signs in using demo credentials
- **User:** "Ya estamos adentro"
- **EMMA:** "Perfecto. Si necesitas que lea el documento, solo dime"
- **User:** "Utiliza browser read screen"
- EMMA reads document content and sections

Important notes:

- SharePoint PDFs use AI vision (can see text and images)
- Reading takes about 5–10 seconds per screen
- EMMA remembers everything already read
- Login is required only once per session

Workflow 3: Get a Procedure Step-by-Step

Example:

- User asks for Noetix Report procedure
- EMMA reads the document
- **User:** "Explícame paso a paso, de manera breve"
- EMMA lists concise steps

Example output:

1. • Generar reporte en Noetix
2. • Seleccionar país y fecha
3. • Actualizar celda A1
4. • Continuar con los siguientes pasos

When to use:

Learning a new procedure or refreshing your memory.

6. Important Tools You Can Invoke

You can **explicitly tell EMMA** which tool to use.

Tool 1: `browser_goto`

What it does:

Navigates to websites or SharePoint pages.

When to use:

To direct EMMA to a specific URL.

What to say:

"Ve a emerson.com"

"Go to [SharePoint URL]"

Tool 2: browser_read_screen (Most Important)**What it does:**

Reads what is currently on screen.

Modes:

- **SharePoint PDFs:** AI vision (text + images, ~5–10 seconds)
- **Regular websites:** Text only (instant)

When to use:

- "Read this for me"
- "What does this document say?"
- When EMMA says she can't see something

What to say:

"Utiliza browser read screen"

"Browser read screen"

Tool 3: browser_snapshot**What it does:**

Shows page structure (buttons, fields, links).

When to use:

- "What buttons can I click?"

- "What's on this page?"

Speed:

Very fast (100–300 ms)

Important

- EMMA has **14 browser tools**
- You only need to know **these 3**
- The others are not configured yet for Finance workflows

7. Tips for Better Results

From **user testing**:

Name the tool if EMMA hesitates

Say "**browser read screen**" instead of stopping

Use waiting phrases

- "Dame un momento"
- "Ya casi te pido ayuda"

You control scrolling

- EMMA reads **one screen at a time**
- She **remembers everything**

Ask for detail level you want

- "De manera muy breve"

- "Paso a paso con todo detalle"

⊗ 8. What EMMA Cannot Do

Browser Automation (Not Configured)

- Cannot fill **Oracle timecards**
- Cannot automate multi-step workflows
- Cannot complete **complex browser processes**

Domain Boundaries

- **Finance procedures only**
- No HR or Payroll access
- No legal or compliance advice
- No transaction execution without confirmation

Visual Limitations

- **Regular websites:** text only
- **SharePoint PDFs:** text + visuals
- Complex diagrams may require repositioning

Technical Constraints

- Browser session times out after **30 minutes of inactivity**
- Requires stable internet
- SharePoint auto-sync runs nightly

9. Troubleshooting

EMMA can't see the document

→ Say: "Utiliza browser read screen"

Procedure not found

→ Check spelling or request procedure list

SharePoint login issues

→ Use demo credentials and Portapapeles method

Wrong document section

→ Say "Dame un momento", scroll, then "browser read screen"

Session timed out

→ Refresh browser and reconnect

EMMA not responding

→ Check microphone permissions