



Set up Annotation Builder

Step by step guide

Speaker name, position, company
XX.XX.2024

Giovanni's Troubleshooting

- After building the first views and the first process explorer in Celonis, pizzeria Mamma Mia has now a first overview of their processes
- To get the employee-specific context, Giovanni asks his employees to stay after work to look into the insights provided by Celonis



Giovanni's Troubleshooting

- To get an overall understanding of the process itself, they start with the Process Explorer
- They quickly realize that the most obvious deviation from the planned process is the "Call Customer" action
- Unfortunately, they only have the transcript of the call, but not the actual reason for it



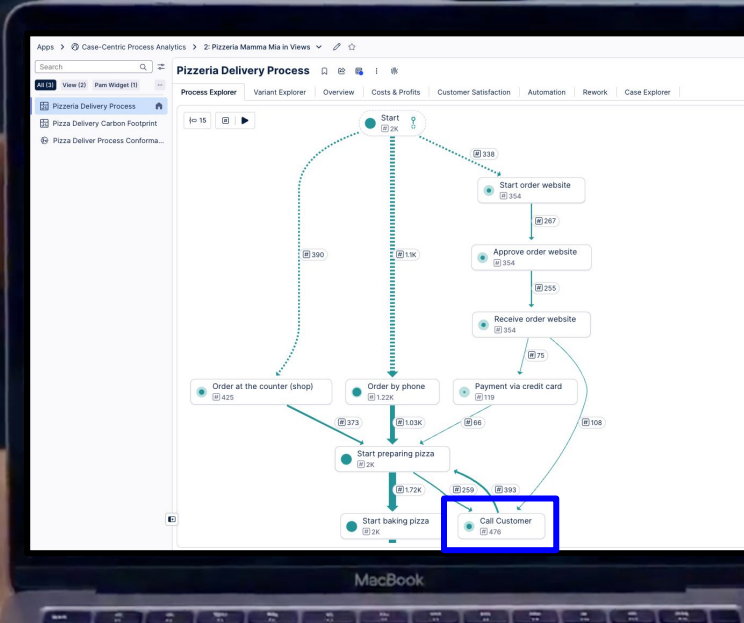
*AI generated video

Giovanni's Troubleshooting

- To get an overall understanding of the process itself, they start with the Process Explorer
- They quickly realize that the most obvious deviation from the planned process is the "Call Customer" action
- Unfortunately, they only have the transcript of the call, but not the actual reason for it

*AI generated image

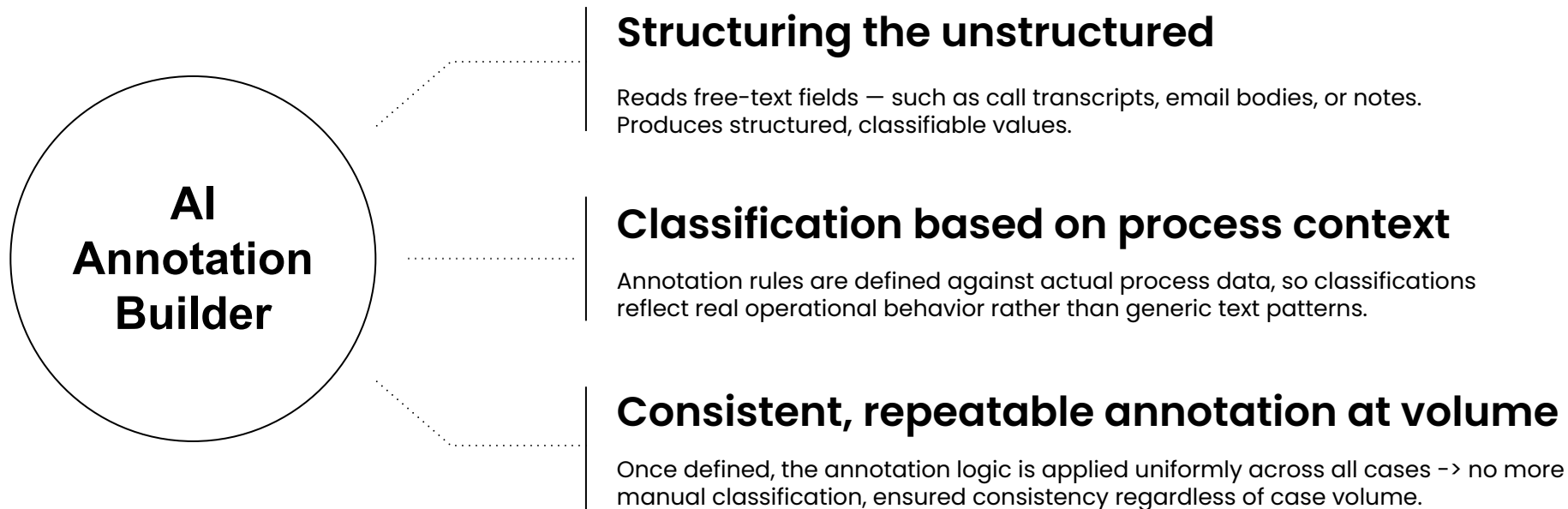
C



Call Customer

476

AI Annotation Builder

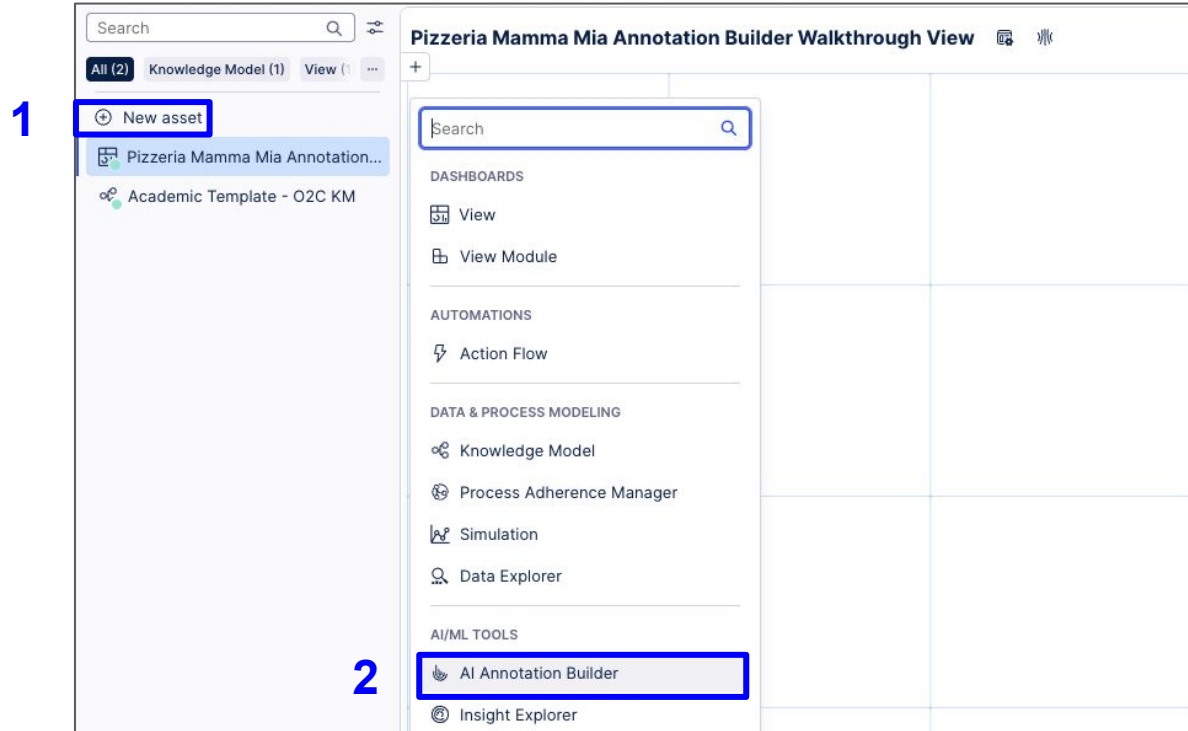


With this tool, the phone call transcript can be analyzed and categorized to get a clear understanding of why each phone call had to happen.

The “AI Annotation Builder” can be found under “New asset” within the “AI/ML Tools” section



1. Create new asset
2. In the AI/ML Tools section, select AI Annotation Builder



First: setup



1. Choose a name, e.g., "Phone Call Analysis AB"
2. Select the KM you have previously created
3. Click 'Create'

Create AI Annotation

1 Name*
Phone Call Analysis AB

2 Knowledge Model*
Pizzeria_Mamma_Mia_DM KM

☒ LLM Annotation Builder Default

Creates table attributes annotated by AI based on system prompts, so they are AI-powered knowledge entities transformed from unstructured data.

☒ Categorizing items ☒ Reasoning mass data ☒ Identifying suspicious activity

Cancel **Create** 3

AB initialization: Data and filters, System Prompt, and the Expected Outputs



Phone Call Analysis AB

1

Data and filters

^

Select the knowledge and process context that this Annotation Builder needs to access.

 Knowledge Model: Academic Template - O2C KM

Input data ⓘ

Rows to annotate: --

Continue

2

System Prompt

^

Click to edit ⓘ

3

Expected Outputs

^

Click to edit ⓘ

Output is generated by AI, please verify as errors may occur.

I. Data Filters

C

1. In the dropdown, select **Pizzeria_Case**
2. Select “Case Key” and “Phone Transcript” as input data
3. Click ‘Save & Continue’

1

Input data ⓘ

Search

Data

- Pizzeria Case
- Pizzeria Event

2

① Data and filters

Select the knowledge and process context that this Annotation Builder needs to access.

Knowledge Model: Updated enriched DM KM

Input data ⓘ

- # Case Key ×
- Phone Transcript ×

Search

☐ Customer Type

☒ Phone Transcript

Open PQL Editor

3

Knowledge Model: Updated enriched DM KM

Input data ⓘ

- # Case Key ×
- Phone Transcript ×

Rows to annotate: 1,998

Save & Continue

II. System Prompt



Set up the system prompt describing what you want to do



You are analyzing a free text field called "Phone_Transcript" from a pizzeria's order management system. Each transcript is an outbound call made by the pizzeria to a customer before preparing their order. Assign EXACTLY ONE category per record based on the transcript content. Do not assign multiple categories.

Category definitions:

- Missing apartment or floor number: The pizzeria calls because the delivery address is incomplete — no apartment number, floor number, or house number was provided.
- Unclear modification or allergy: The pizzeria calls because a topping change or allergy constraint from the phone order was unclear, or it was not clear which pizza it applies to.
- Item out of stock: The pizzeria calls to inform the customer that the item ordered online is currently unavailable.
- Out of zone delivery: The pizzeria calls to inform the customer that their address is outside the delivery zone.
- Delivery time longer than expected: The pizzeria calls to warn the customer that their delivery will take significantly longer than usual.
- Unclear special request in notes: The pizzeria calls because a note written in the online order form could not be interpreted by the kitchen.
- Empty: The transcript field is empty — no call was made for this order.

System Prompt

Describe the problem you want this Annotation Builder to work on, define its role and give tasks.

System prompt improvements found.

Describe your use case ⓘ

GPT 4o Mini (Azure O... ▼)

You are analyzing a free text field called "Phone_Transcript" from a pizzeria's order management system. Each transcript is an outbound call made by the pizzeria to a customer before preparing their order. Assign EXACTLY ONE category per record based on the transcript content. Do not assign multiple categories.

Category definitions:

- Missing apartment or floor number: The pizzeria calls because the delivery address is incomplete — no apartment number, floor number, or house number was provided.
- Unclear modification or allergy: The pizzeria calls because a topping change or allergy constraint from the phone order was unclear, or it was not clear which pizza it applies to.
- Item out of stock: The pizzeria calls to inform the customer that the item ordered online is currently unavailable.
- Out of zone delivery: The pizzeria calls to inform the customer that their address is outside the delivery zone.
- Delivery time longer than expected: The pizzeria calls to warn the customer that their delivery will take significantly longer than usual.
- Unclear special request in notes: The pizzeria calls because a note written in the online order form could not be interpreted by the kitchen.
- Empty: The transcript field is empty — no call was made for this order.

Save & Continue

III. Expected Outputs



1. Name the output column
2. Select 'Choice' as the output type
3. Enter the categories separated by comma
4. Check 'Include Reasoning column'
5. Save and test the configuration

Expected Outputs

Describe which output columns should be generated by the Annotation Builder.

Output 1

Column name
Phone_Call_Reason

Select output type
String Choice

Column description
AB annotated column

Type choices
Missing apartment or floor number,Unclear modification or allergy,Item out of stock,Out of zone delivery,Delivery time longer than expected,Unclear special request in notes,Empty,Unsure

Enter all choices in plain text, while seperating them with a comma.

+ Add Output

☒ Include Reasoning column

Save & Test configuration



Missing apartment or floor number,Unclear modification or allergy,Item out of stock,Out of zone delivery,Delivery time longer than expected,Unclear special request in notes,Empty,Unsure

Validation Table



The validation table will contain a subset of 10 rows from

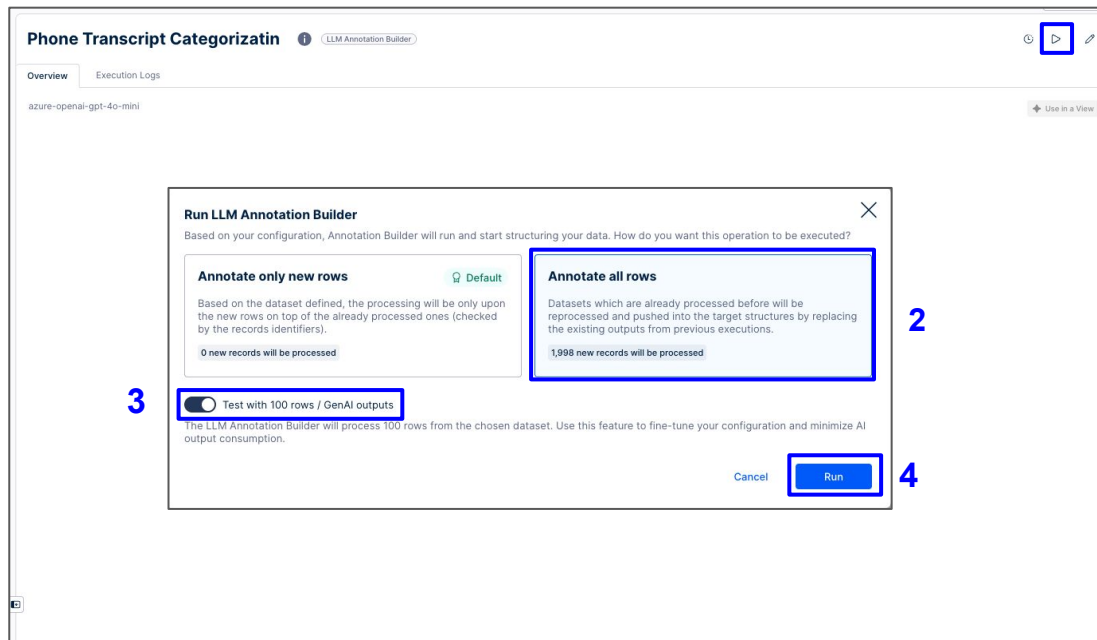
- the column the Annotation Builder is based on (**Phone transcript**),
- the generated category for **Phone_Call_Reason**,
- and the reasoning behind it.

Data Validation Table			 Hide table
	◇ Phone_Call_Reason ↑↓	◇ Reasoning ↑↓	
	Empty	The transcript field is empty, indicating that no call was made for this order.	
	Unclear modification or allergy	The call was made to clarify the customer's request for 'light on the sauce', which was ambiguous.	
	Empty	The transcript field is empty, indicating that no call was made for this order.	
	Empty	The transcript field is empty, indicating no call was made for this order.	
Thank you. Staff: Understood. We have cancelled your order and a full refund will be processed immediately.	Out of zone delivery	The transcript indicates that the delivery address falls outside the delivery zone, prompting the call.	
	Unclear special request in notes	The call was made to clarify an unclear note regarding the order preparation.	
	Empty	The transcript field is empty, indicating that no call was made for this order.	
	Empty	The transcript field is empty, indicating that no call was made for this order.	
	Empty	The transcript field is empty, indicating that no call was made for this order.	
	Unclear modification or allergy	The call was made to clarify the customer's request for 'light on the sauce', which was ambiguous.	

Run the Annotation Builder



1. Click on the “play” symbol at top right corner
2. For the test and first load choose “Annotate all rows”
3. Enable “Test with 100 rows”
4. Click on Run
5. Confirm outputs
6. Redo step 1 – 5, this time disable the test



AI Annotation Builder

With this tool the phone call transcript can be analyzed and categorized to get a clear understanding of why each phone call happened.

From noise to signal

The AI Annotation Builder extracts the crucial information buried in unstructured inputs, so your automations always act on accurate, reliable data.

Process-grounded AI

Annotation Builder is powered by the Process Intelligence Graph, meaning your AI understands how your business actually operates, not just how it's supposed to.

Accurate automation at scale

Define annotation logic once and let Celonis apply it consistently across thousands of cases, at the speed and scale your operations demand.

