Approvals use case for technical POC with CoPilot

For the technical POC, we will utilize the Approvals use case. In this use case, the Finance Manager (Joanne) wants to review and act upon requisition related pending approvals. For the POC demo, CoPilot standalone app will be used in place of in-app integration with Ariba Apps. Authentication integration will not be implemented for the first POC and we will assume the user is already authenticated in CoPilot.

Trigger: Joanne logs in to her machine in the morning and as part of daily habit wants to address the approvals. She opens CoPilot, completes authentication and starts with her activity.

Success Criteria for Joanne: Joanne is able to get the information needed and complete actions on approvals of interest.

Success Criteria for POC: CoPilot is able to correctly identify the intent of the utterances, call API end points with correct parameters and display the information to Joanne in simple manner. When the exact intent is not identified, CoPilot should be able to ask clarifying questions to Joanne.

Goal: Demonstrate a meaningful interaction in CoPilot to get information and conduct actions on the information. The demo can be used as a working showcase to stakeholders and Products teams within Ariba to get their interest and confidence.

Following are the dialogs we would like to exercise with the Approvals use case.

1. Joanne opens the CoPilot standalone browser app (assumes authentication is done) with goal to check on pending approvals and take necessary actions.
2. Joanne asks whether there are any pending approvables (expects either Yes/No or Count of pending approvals)
   1. “Are there any pending approvals”
   2. “Are there any approvables waiting for action”
   3. “Are there any approvals waiting for action”
   4. “Are there any approvables waiting for me”
   5. “Are there any approvals pending from my side”
   6. “Are there any approvals waiting for my approval”
   7. “Are there any requisitions waiting for approvals”
   8. “Do I have any approvals to take care of”
   9. “Any approvals to take care”
   10. “Any approvals for me”

* **curl -k -X GET "https://itg-openapi.aws.ariba.cm:8443/api/approval-copilot/v1/sandbox/changes?realm=mytestrealm" -H "accept: application/json" -H "apiKey: 5bb8b7009a294f408fd01a263a3bcd68"**
* **(The first field returns the total number of elements)**

1. Joanne queries for all pending Approvables.
   1. “Show them”
   2. “List them”
   3. “Display them”
   4. “Show all pending approvals”
   5. “Show pending approvals”
   6. “Show me all pending approvals”
   7. “Show me all approvals waiting for me”
   8. “Show me all approvals waiting for my action”
   9. “List all approvals waiting for me”

* **curl -k -X GET "https://itg-openapi.aws.ariba.cm:8443/api/approval-copilot/v1/sandbox/changes?realm=mytestrealm" -H "accept: application/json" -H "apiKey: 5bb8b7009a294f408fd01a263a3bcd68"**
* **The content array has the details of the approval changes**

1. Joanne asks how many of these are for requisitions.
   1. “How many of these are requisitions”
   2. “How many approvals are there for requisitions”
   3. “How many of these are for requisitions”
   4. “How many of these are related to requisitions”
   5. “What is the count of requisition approvals”
   6. “What is the count of requisition related approvals”

* **curl -k -X GET "https://itg-openapi.aws.ariba.com:8443/api/approval-copilot/v1/sandbox/changes?realm=mytestrealm&rsqlfilter=documentType%3D%3Drequisitions" -H "accept: application/json" -H "apiKey: 5bb8b7009a294f408fd01a263a3bcd68"**

1. Assume 10 approvals are waiting for her action.
2. Joanne request to list only those approvals which are more than $500 in value.
   1. “Show only those which are more than $500 in value”
   2. “Show only those which are more than $500”
   3. “List only those which are more than $500 in value”
   4. “Show only ones which are greater than $500”
   5. “List ones more than $500”

* For all approvals greater than $500 – **curl -k -X GET "https://itg-openapi.aws.ariba.cm:8443/api/approval-copilot/v1/sandbox/changes?realm=mytestrealm&rsqlfilter=price%3E500" -H "accept: application/json" -H "apiKey: 5bb8b7009a294f408fd01a263a3bcd68"**
* For all approvals of requisitions type and greater than $500 - **curl -k -X GET "https://itg-openapi.aws.ariba.om:8443/api/approval-copilot/v1/sandbox/changes?realm=mytestrealm&rsqlfilter=(documentType%3D%3Drequisitions%20and%20price%3E500)" -H "accept: application/json" -H "apiKey: 5bb8b7009a294f408fd01a263a3bcd68"**

1. Assume 5 approvals
2. Joanne requests to see details of 2nd approvable.
   1. “Show details of 2nd approval”
   2. “Give me details of 2nd approval”
   3. “Open the 2nd approval”

**curl -k -X GET "https://itg-openapi.aws.ariba.cm:8443/api/approval-copilot/v1/sandbox/requisitions/PR2?realm=mytestrealm" -H "accept: application/json" -H "apiKey: 5bb8b7009a294f408fd01a263a3bcd68"**

1. Joanne approves it.
   1. “Approved”
   2. “Approve”

(approving PR5 )

* **curl -k -X PATCH "https://itg-openapi.aws.ariba.com:8443/api/approval-copilot/v1/sandbox/requisitions/PR5/approve?realm=mytestrealm&user=khouston&passwordadapter=PasswordAdapter1" -H "accept: application/json" -H "apiKey: 5bb8b7009a294f408fd01a263a3bcd68" -H "content-type: application/json" -d "{ \"comments\": \"approve\"}"**
* ***Note: approverId for the requisition should match user in the query.***

1. CoPilot should ask for a comment in this case. Joanne can enter it.
2. Joanne asks to see details of the last approval
   1. “Show details of last approval”
   2. “Give me details of the last one”
   3. “Open the last one”

* **curl -k -X GET "https://itg-openapi.aws.ariba.cm:8443/api/approval-copilot/v1/sandbox/requisitions/PR8?realm=mytestrealm" -H "accept: application/json" -H "apiKey: 5bb8b7009a294f408fd01a263a3bcd68"**

1. Joanne posts comment on it
   1. “Add comment saying is the item really necessary?”
   2. “comment is it really necessary?”
   3. “comment “is it really necessary?””

* **curl -k -X PATCH "https://itg-openapi.aws.ariba.com:8443/api/approval-copilot/v1/sandbox/requisitions/PR5/comment?realm=mytestrealm&user=khouston&passwordadapter=PasswordAdapter1" -H "accept: application/json" -H "apiKey: 5bb8b7009a294f408fd01a263a3bcd68" -H "content-type: application/json" -d "{ \"comments\": \"is it really necessary\"}"**

1. Joanne asks to sort the approvals by price
   1. “Sort approvals by price”
   2. “Sort by price”
   3. “Sort by price descending”
   4. “Sort by price, highest on top”

* **curl -k -X GET "https://itg-openapi.aws.ariba.com:8443/api/approval-copilot/v1/sandbox/changes?realm=mytestrealm&order\_by=price%20desc" -H "accept: application/json" -H "apiKey: 5bb8b7009a294f408fd01a263a3bcd68"**

1. Joanne asks to reject all that are more than $1000 (assume 2 have > $1000).
   1. “Reject all approvals more than $1000”
   2. “Deny all those more than $1000”
   3. “Reject ones > $1000”
2. Joanne exits the CoPilot tool.