

Advanced Cass in Advisory Services: Course Introduction and Set-up

Adv. Advisory | ACCTG 528

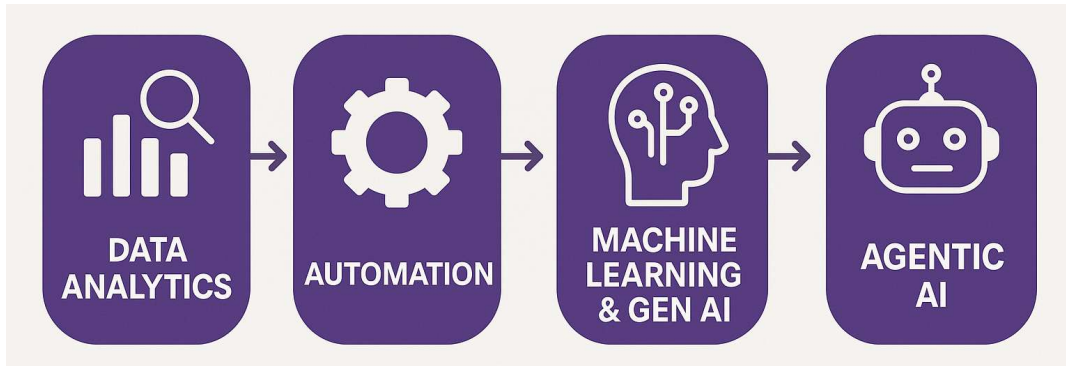
MPAcc Class of 2026

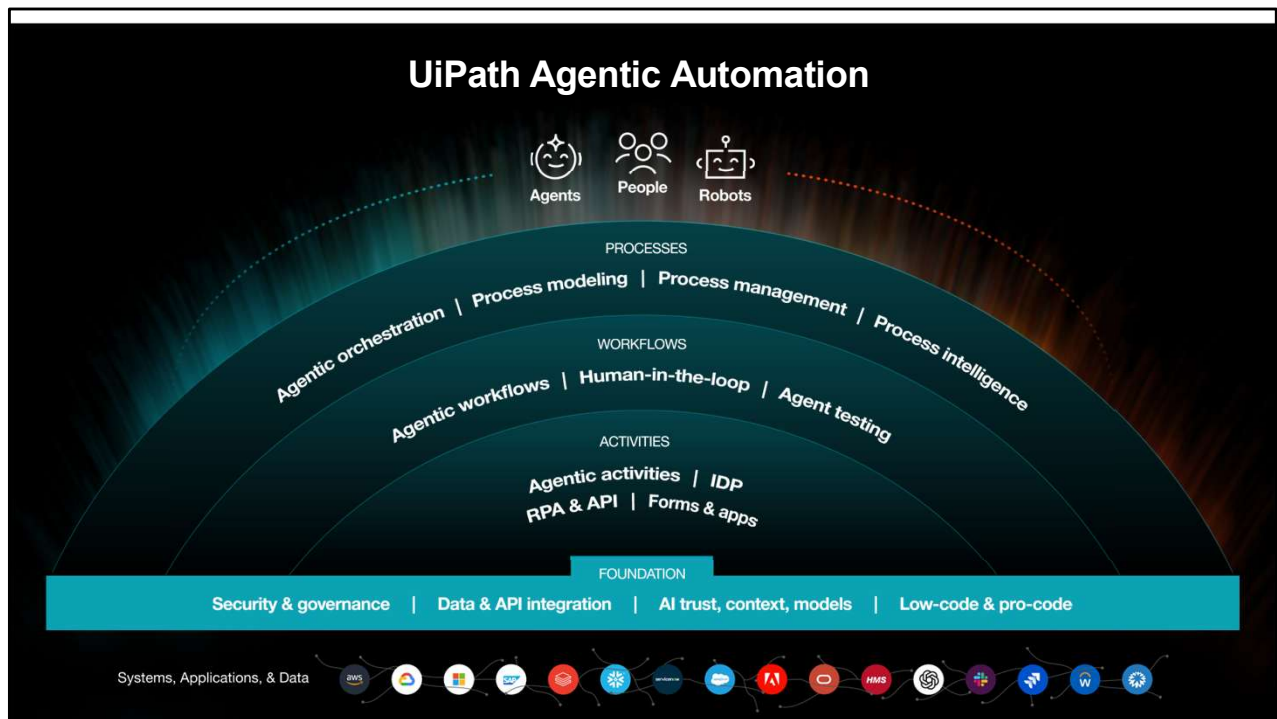
FOSTER
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UNIVERSITY of WASHINGTON

Agenda

- **Course Overview**
- Syllabus
- Internship Reflection
- UIPath Licenses
- Process Maps Exercise & Submission

Course Overview





- Everything happens in one place: the UiPath Platform—where AI Agents aren’t just assistants, they’re true work partners, transforming complexity into a seamless, orchestrated operation.

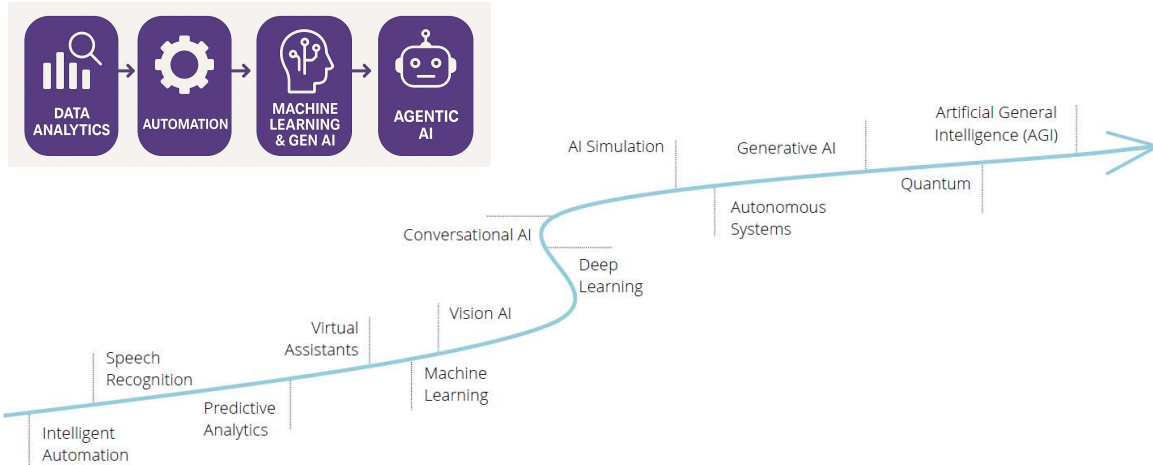
- We break it down into three powerful layers: **Activities** (the building blocks—reading, processing, integrating), **Workflows** (connecting the dots with human-in-the-loop and testing), and **Processes** (the big picture—managing, optimizing, and enhancing enterprise operations).

- Agentic Orchestration / Maestro takes automation even further—coordinating UiPath Agents, third-party AI models, people, robots, and tools into a single, intelligent system.

- Your existing systems don’t need to be reinvented—our platform integrates seamlessly with your data, applications, and workflows while maintaining enterprise-grade security, governance, and AI trust.

- We’re not just compatible with your tech stack—we enhance it. From cloud providers like AWS, Google, and Azure to enterprise apps like Salesforce and SAP, we turn digital chaos into a symphony of efficiency.

Automation Technology Progression with AI



Automation using Rules versus Decisions

Rules

- Can automated using logic such as “if $x > 200$ then ...”
- Even complex rules can be automated if no decision is required (e.g., filling out long structured forms from existing data)

Decisions

- Harder to automate until recently, requires reasoning.
- Newest Generative AI models are now able to provide their reasoning, making some decisions automatable, for example summarizing information, extracting document meaning, executing higher logic (e.g., applying leasing standards)

Core Capabilities: Doc & Data Intelligence

Doc Intelligence

- Automated understanding and summarization of documents
- Quick extraction of important points and data from any text
- Comparison of document contents to identify key differences
- Accurate language translation for diverse document types
- Trend and pattern detection within large volumes of text

Data Intelligence

- Connect to any data source, integrating seamlessly with AI.
- Utilize AI to uncover deep insights from complex datasets.
- Empower finance to do real-time decision-making with dynamic, AI-driven data analysis.
- Leverage predictive analytics to forecast trends and guide strategic planning.

AI Engagement Models: Prompt vs. Automated

Prompt-Response

- Use an AI assistant for direct, real-time interaction to receive immediate feedback and assistance.
- Adaptive AI responses evolve from each user interaction, enhancing accuracy and relevance.
- Enable swift problem-solving and decision support, improving overall efficiency and user experience.

Automated

- AI operates in the background based on predefined prompts and conditions.
- Conducts continuous background processing for data analysis, info generation, and monitoring.
- Automates tasks to streamline operations and prepare actionable insights without user intervention.

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Syllabus Discussion

<https://www.ashercurtis.me/teaching/courses/acctg528/syllabus.html>

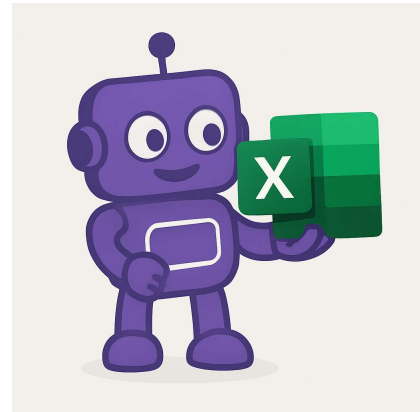
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Automating Excel

In pairs, discuss of a process or task you have performed in excel explain to each other how it meets the following criteria:

- It is repetitive
 - It is possible to make data errors
 - It didn't seem like rewarding work
- and then submit the task to PollEverywhere.



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Lab links (also online)

UIPath License: <https://www.uipath.com/rpa/academic-alliance/academic-studio-download>

UIPath Cloud: <https://cloud.uipath.com/>

Remote Labs: <https://fprod-hcs.foster.uw.edu/>

Thank you

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