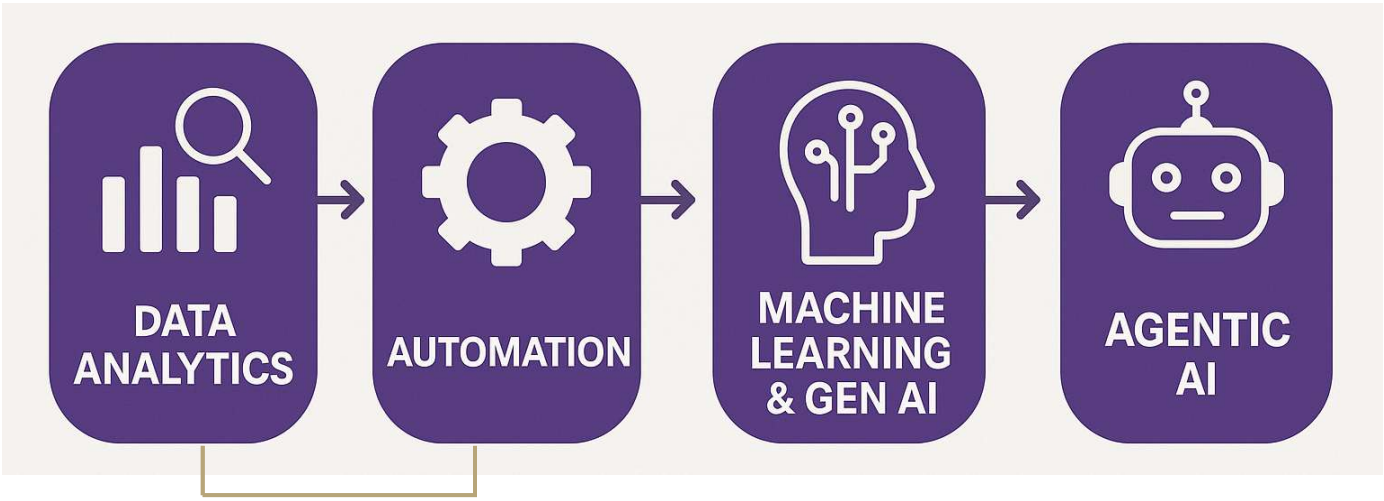

Robotic Process Automation
Part 2
Acctg & Fin | BUS AN 500 | Class 04
Spring Qtr | 2026
FOSTER
SCHOOL OF BUSINESS
UNIVERSITY of WASHINGTON

What will we do today?

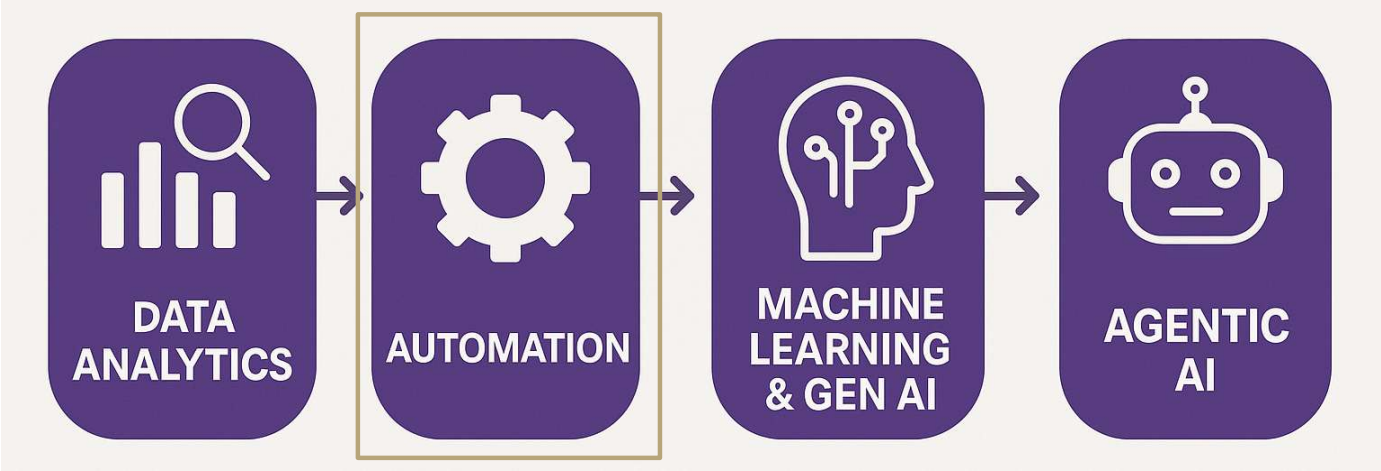
- **Review**
  - **Robotic Process Automation**
  - Individual Submissions
- Final Project Context Overview
  - Financial Performance & Forecasting
  - Budgeting and & FPA
  - Project Evaluation & Risk
- Team Check-in
- Workshop/Lab time
  - Individual RPA Submission (30%)

Course Diagram



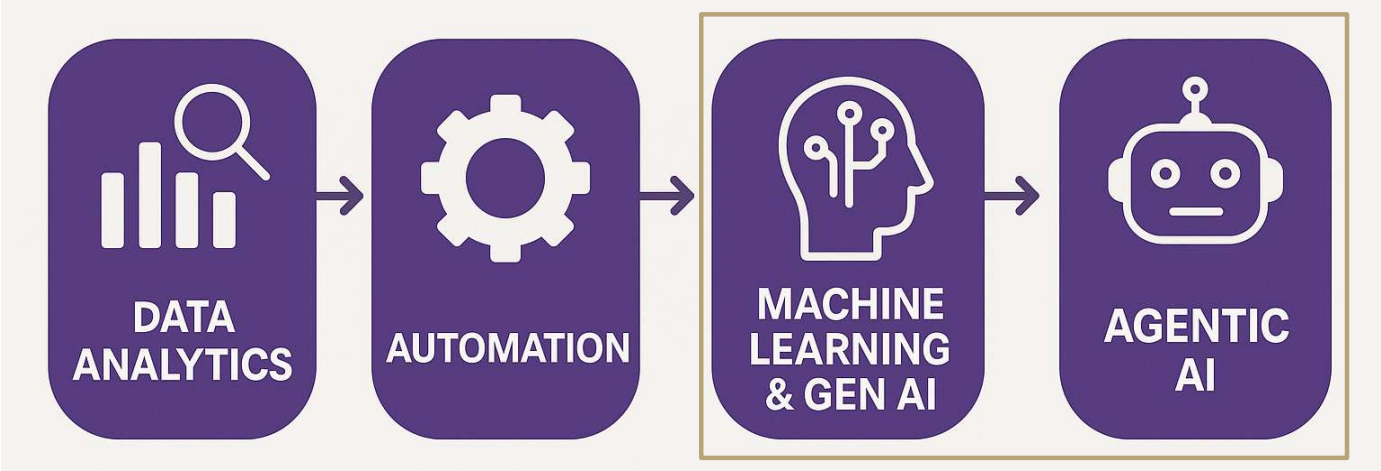
Analytics workflows & pipelines

Course Diagram



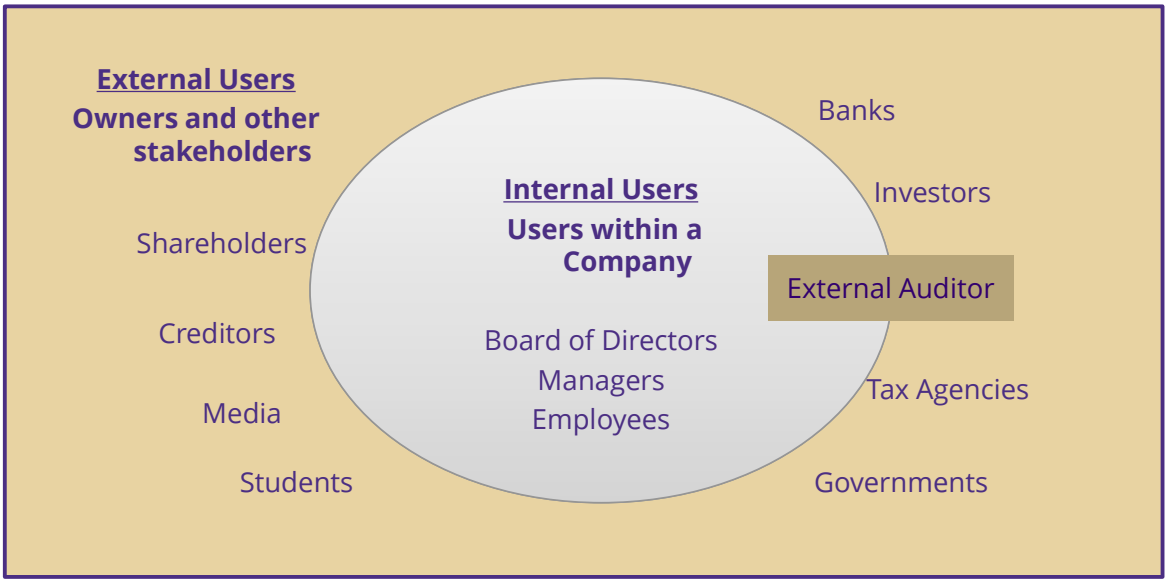
Robotic Process Automation
(deterministic processes)

Course Diagram



Classes 5, 6, & 7

Accounting & Finance Function



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Individual Submissions

What if I can't get the bot running?

- That's fine, demo to where it works, explain where you got stuck and explain the rest of the workflow in terms of what you planned to have it do.
- Continue to explain the potential benefits of the bot (how many hours it could save, the types of human errors it can reduce).

What if I can't find an activity that works in my workflow?

- Consider alternatives, or,
- Add a comment activity and write in what the plan for that step was.

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Intelligent Automation Team Challenge

A team project that focuses on an enterprise level automation robot aimed at solving a reporting problem.

- The bot can be demonstrated in a proof-of-concept state.
- Has a Generative Artificial Intelligence (LLM) and/or Agentic AI / AI Agents component.

Requirements

- Software deliverable: A prototype (or example) of a solution to the problem.

- Presentation deliverable: Discussion of the problem being solved, how the agent benefits the task or workflow, and an evaluation of the usefulness of the Agent or LLM example.

Accounting & Finance Focus Areas

We will focus on the following core areas:

- Financial Performance & Forecasting
- Budgeting & Financial Planning and Analysis (FPA)
- Project Evaluation & Risk

Teams have the option to choose from these areas (or some other options).

Structuring the problem

I will provide each team with a problem from within the Accounting & Finance Function* for this problem, you will be asked to present an AI-agent solution to the use-case focusing on:

- What does an intelligent agent need to know, compute, and determine/reason?

* If your team is interested in solving a different problem from the pool of potential ones I offer let me know

Structuring the project

The project will have each team focus on

- What are the appropriate inputs/data?
- What is the model or logic used to solve the problem?
- What decisions and explanations do I want the agent's help on?

Financial Analysis & Forecasting

Data: transactions, financial statements, earnings reports

Logic: Trend analysis & ratio analysis

Agent Role: Explain performance & generate insights, predict outcomes & explain key assumptions

Users/audience: Internal (managers) and external (investors) to the firm

Budgeting and & Financial Planning and Analysis

Data: Transactions / budgets versus actuals reports (internal).

Logic / tools: variance analysis, relevant costs, cost allocation.

Agent roles: Diagnose what went wrong (missing a budget target), aid in filtering decision-relevant information (relevant v irrelevant costs).

Users/audience: Internal management decisions.

Project Evaluation & Risk

Data: investment targets, risk/return estimates and cost of capital, projected future cash-flows.

Logic tools: Time value of money, valuation, capital asset pricing models.

Agent roles: Rank & Recommend Investment decisions based on a set of targets, simulate uncertainty and risk analysis and/or evaluate investment trade-offs over time.

Users/audience: Mangers and investors.

Some other potential focus areas

- Fraud Detection
- Portfolio Management
- Environmental, Social and Governance reporting
- Personal Finance
- Wealth Planning
- Tax Optimization
- Compliance
- Cybersecurity
- Blockchain

Structuring the data

Simulate data internal company inputs for this task or use real company disclosures and/or stock prices.

Proof-of-concept / prototype

Multiple possible approaches:

- Goal: Proof of agent concept (UiPath, Python, LLM) without automation **do this part first.
- Goal: Proof of concept process map in business process mapping notation (BPMN) **do this second.
- Goal: Working automation workflow prototype with agents using business process mapping notation (UiPath, Python). **optional; do this third.

Presentation Preparation

Each team will present for up to 15 minutes plus up to a 5 minute Q&A.

- What is the problem, why is it important
- What your solution achieves
- Mechanics of the solution (data inputs, process, outputs)
- Conclusion and Q&A

Non-presenting class members are expected to ask questions.

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Individual Submissions (reminder, from above)

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Submission checklist

- ✓ Build your RPA solution in UiPath Cloud Studio Web
- ✓ Save it as an *.uip or *uis file (the three vertical dot menu next to the solution, choose **Download Solution**)
- ✓ Set up Zoom or other video software to record your video. Speak to the bot's purpose and benefits on camera with you visible, run the bot with screen being captured showing the bot operating.
  - ✓ Discuss any inputs or outputs required for the bot.
  - ✓ Use Efficiency (hours saved) and effectiveness (errors avoided).
  - ✓ Save your video recording locally.
- ✓ Download copies of anything required to run the bot (inputs etc).
- ✓ Zip all the files together (UiPath solution file, video, inputs).

Thank you

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