

Advanced Cass in Advisory Services: Introduction

Adv. Advisory | ACCTG 528

MPAcc Class of 2025

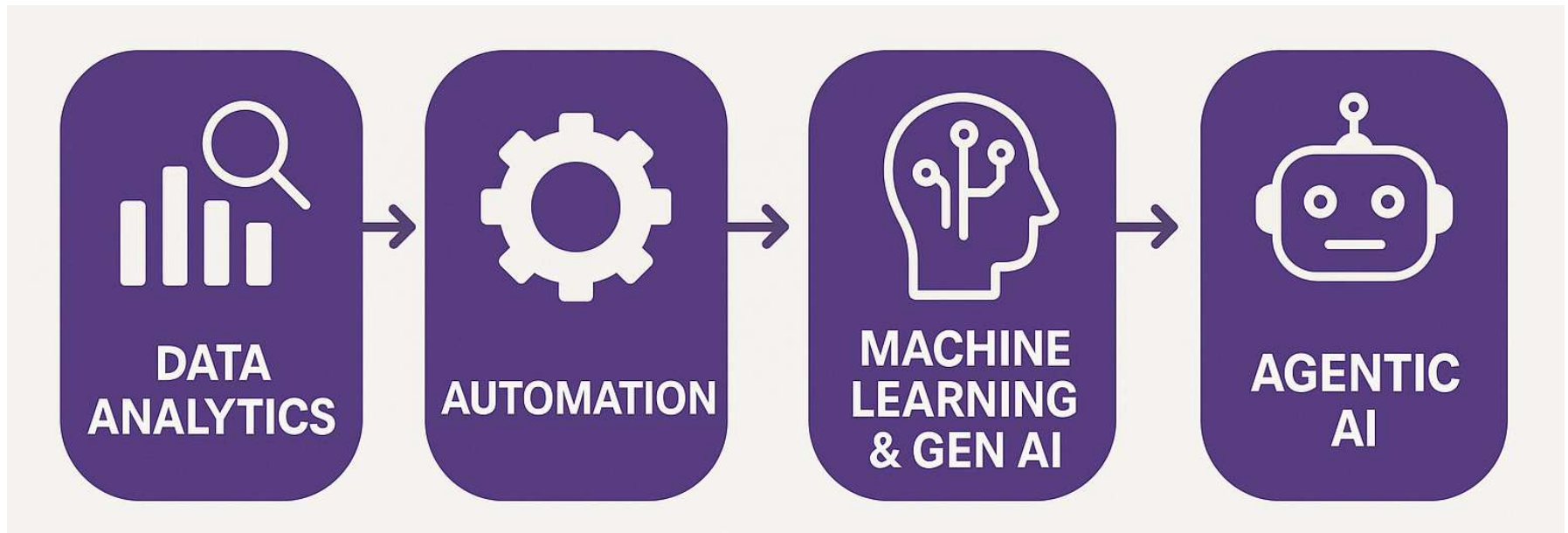
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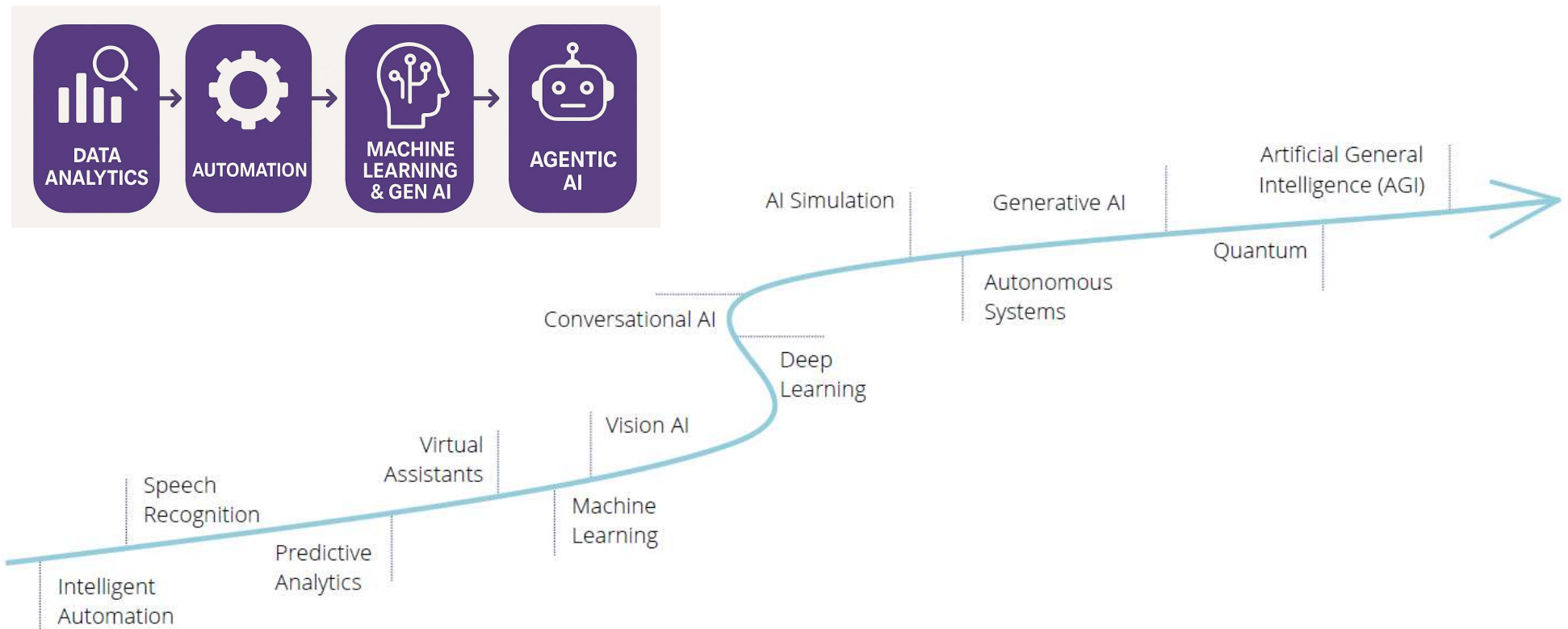
Agenda

- **Course Overview**
- Syllabus
- Internship Reflection
- UiPath Licenses
- LucidChart Process Maps Exercise

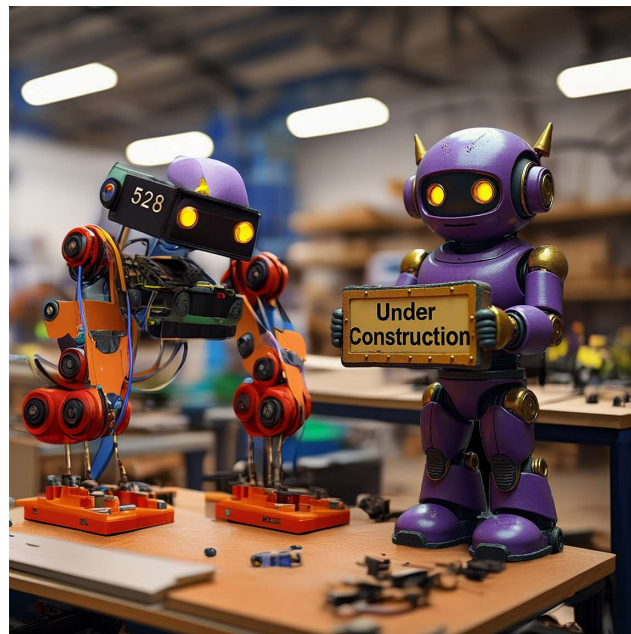
Course Overview



Automation Technology Progression with AI



What can we expect robots to do?



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>

https://www.ashercurtis.me/teaching/courses/mpacc/common_spring_project.html (preview version)

Assessment

Assessment	Assessment Type	Deliverables	Due Date	Grade Percentage
Professionalism	Individual	Polls; Verbal and Written Communication	All Quarter	20%
RPA Individual Submission	Individual	Software; Short Video Recording	Class 13	30%
Intelligent Automation Team Challenge	Team	Software; Short Presentation	Classes 17 and 18	35%
Common Final Project	Team	Written Material; Presentation	Classes 19 and 20	15%

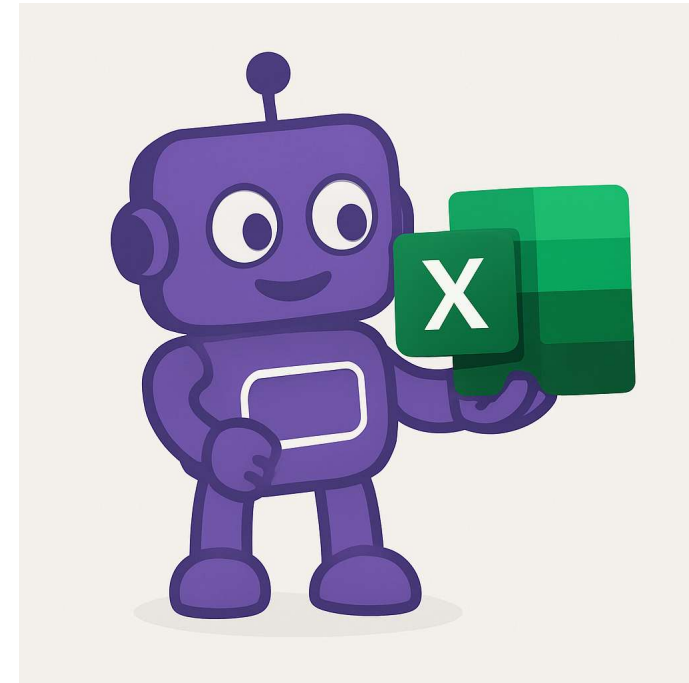
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Automating Excel

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)

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

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

LucidChart: <https://www.lucidchart.com/>

Thank you

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