

Automation · RPA · AI

Choose the right mix of rules, RPA and AI

Match each step to the capability it needs, then connect the steps without losing control of the result.

What you finish with: A workflow with a clear job for existing software, RPA, AI and the person responsible for approval.

[Read this guide online](#)

WORKFLOW / TECHNOLOGY

Give each tool a clear job.

01

Rules and software

Calculate, check a tolerance or route a defined action.

02

RPA

Move defined actions across interfaces when appropriate.

03

AI assistance

Interpret, explain or draft; keep the required review.

The person with authority approves the consequential action. Exceptions have a route back.

01 Separate moving information from interpreting it

Start with a repeatable task and mark the steps. Calculating a total, checking a tolerance or routing an approved request follows a defined rule. Reading a narrative, proposing an explanation or interpreting an unfamiliar request may need AI assistance and review.

Check the application you already own for configuration or an integration that can do the job. RPA can carry defined actions across user interfaces, especially where a suitable integration is unavailable. The

interface, permissions and exception handling still need maintenance; a bot's ability to click through a task does not make the whole process reliable.

02 Choose a useful first automation

Good candidates to investigate include moving approved forecast inputs into a legacy system, gathering scheduled reports for reconciliation, and checking that required close submissions have arrived. Confirm that the steps, inputs and exceptions are stable enough to specify before automating them.

Use an AI assistant to propose a summary or classify ambiguous material when that improves the result. Agentic workflows can select and call tools within an allowed scope; define those permissions, stopping conditions and review points explicitly. A fixed RPA sequence that calls a model is not automatically a workflow that needs autonomous planning.

03 Connect the parts with checks at the handoff

Keep identifiers and source references with the data. Validate required fields and totals before the next step. Give repeated runs a way to detect work already completed, so a retry cannot create duplicate submissions or postings. Route missing data, low-quality output and failed actions to a named owner.

Test representative successful and failed runs in an approved environment. Compare total effort, including monitoring, review and corrections, with today's process. Retain the existing approval for a consequential action such as a journal posting, external communication or payment. Record how the workflow stops and how the team recovers.

Example automation workflow

A reporting workflow with a clear handoff

Finance wants to prepare its monthly management commentary from approved reports and supporting notes.

Existing application or RPA:

Retrieve the approved reports through an integration, scheduled export or a defined UI sequence. Keep the reporting period and source identifiers.

Rules:

Check period, completeness and totals. Stop if the wrong version or a missing file is detected.

AI assistance:

Draft commentary from those reports and confirmed explanations. Mark unsupported causes as questions and retain source references.

Human review:

The responsible finance reviewer checks the figures, explanations and reporting treatment before the pack is distributed.

Measure:

Compare preparation, review, correction and monitoring effort for the complete task, while tracking errors and missed deadlines.

Your working record

AUTOMATION HANDOFF

Field	Your record
Task / business result:	
Step 1 and its inputs:	
Existing feature or integration available:	
Defined UI steps that may need RPA:	
Interpretation or drafting that may need AI:	
Allowed tool actions / actions requiring approval:	
Input checks / duplicate prevention:	
Exceptions / owner / stopping condition:	
Output, source references and reviewer:	
Baseline total effort / quality / deadline:	
Test result including monitoring and correction:	

[Open the guide to copy this record into your team's document](#)

Related reading

[The AI Use Case Dashboard](#)

Where the job is interpretation, start from a complete case: prompt, sample and the checks a person runs.