

Robotic process automation for tax administration

Course outline · issued 14 September 2026

Technology areas	Robotic Process Automation
Level	Intermediate
Short course	3 days
One-month track	4 weeks · 16 training days · 96 contact hours
Two-month track	8 weeks · 32 training days · 192 contact hours
Delivery	In person, Virtual, Hybrid
Class size	8 to 16 participants
Certification	Certificate of completion
Entry requirements	Process knowledge. No programming experience assumed.

Who it is for

Process owners and ICT staff automating repetitive back-office work.

REVENUE USE CASE

Automating the matching of payment confirmations to assessments.

By the end, participants can

- Identify processes suitable for automation
- Build and test a simple software robot
- Govern bots with logging and exception handling

Short course modules (3 days)

1. Process discovery and selection
2. Bot design fundamentals
3. Building a bot
4. Exception handling and logging
5. Automation of a document-matching task

One-month track — weeks 1 to 4

4 weeks · 16 training days · 96 contact hours

Week 1 — Process discovery and selection

- What automates well and what does not
- Mapping a process as it is actually performed
- Measuring volume, handling time and error rate
- Building the automation candidate list

Practical: Map and measure one real back-office process.

Week 2 — Bot design fundamentals

- Selectors, interfaces and brittle automation
- Designing for the exception, not the happy path
- Attended versus unattended automation
- Designing a bot another person can maintain

Practical: Produce a solution design document for your chosen process.

Week 3 — Building a robot

- Recording, refactoring and structuring a workflow
- Variables, data tables and reusable components
- Working with documents, email and spreadsheets
- Testing a bot properly

Practical: Build a working robot for the core path of your process.

Week 4 — Exception handling and logging

- Business versus system exceptions
- Retry, escalate and human handover
- Logging for audit and for debugging
- Handing a failed transaction back safely

Practical: Harden the robot and prove it fails safely.

Checkpoint: the one-month track is assessed [here](#).

Two-month track — continues through weeks 5 to 8

8 weeks · 32 training days · 192 contact hours

Week 5 — Document understanding

- Extracting data from scanned returns and receipts
- Optical character recognition and its error rates
- Validation and human-in-the-loop review
- When accuracy is not good enough to automate

Practical: Automate extraction from a batch of scanned documents.

Week 6 — Orchestration and operations

- Queues, scheduling and unattended running
- Credentials and privileged access for bots
- Monitoring a robot estate
- Capacity and cost per transaction

Practical: Deploy the robot to run unattended on a schedule.

Week 7 — Governance and control

- Change control and versioning for bots
- Segregation of duties where a bot acts
- Audit trail and internal audit expectations
- Building a small automation centre of excellence

Practical: Write the control document and audit trail specification.

Week 8 — Capstone automation

- Completing and stabilising the robot
- Measuring the benefit honestly
- Presenting to the process owner for sign-off
- Pipeline of the next automations

Practical: Present the capstone robot and its measured benefit for sign-off.

Capstone assessment and post-course evaluation.

Capstone

A production-ready software robot for one real back-office process, with exception handling, logging, a control document and a measured time saving.

About this outline

Indicative extended tracks. The one-month track runs weeks 1 to 4; the two-month track continues through week 8 with deeper labs, certification preparation and a capstone. Weeks, contact hours and cohort sizes are finalised with each client.

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