POSITIONING

Turn Business Processes into Governed, AI-Powered Digital Workflows.

DesIDEA helps organizations identify, design, build, integrate, govern, and continuously improve AI-powered business automation - connecting people, applications, data, and AI so repetitive work becomes faster, more consistent, and easier to manage.

Enterprise AI automation - not "AI for AI's sake."

We combine intelligent document processing, AI agents, workflow automation, application integration, desktop RPA, software test automation, and human approvals into measurable, governed digital workflows.

Can your teams complete multi-system processes without re-keying, email chasing, or silent exceptions?

What AI & Automation Means for the Enterprise

AI handles interpretation - documents, classification, summarization, and next-step selection. Automation executes repeatable steps across ERP, CRM, email, SharePoint, databases, and custom apps. Governance decides what the solution may access and do.

DesIDEA designs solutions that combine **Power Automate**, **Copilot Studio**, **Azure AI**, **APIs/connectors**, **desktop RPA**, and **human approvals** - without rebuilding every process from scratch.

How the Architecture Works

EXPERIENCE	Teams | Portals | Email | Chat
AI LAYER	Agents | IDP | Classification | RAG
ORCHESTRATION	Power Automate | APIs | Events
GOVERNANCE	Identity | Approvals | Audit | Monitor

Design principle: *Use AI where ambiguity exists; keep transactional steps, calculations, and system updates deterministic.*

Why Ungoverned Automation Becomes Business Risk

HALLUCINATED ACTIONS | OVER-PERMISSIONED AGENTS | SILENT EXCEPTIONS | NO HUMAN OVERSIGHT

We design for failure - retries, exception queues, escalation, and approval gates - so automation stays safe when data is messy or processes change.

Capability Pillars Across the Automation Landscape

Capability	Role within AI & Automation
AI Agent Development	Enterprise agents that understand intent, retrieve approved knowledge, and initiate controlled actions.
Intelligent Document Processing	Extract, classify, validate, and route invoices, POs, forms, contracts, and emails.
Workflow Automation	Approvals, notifications, case routing, onboarding, and data synchronization.
Desktop RPA	Automate legacy/desktop apps where APIs are unavailable - with controls and monitoring.
Application & API Integration	Connect SAP, Microsoft 365, Dataverse, databases, and third-party services.
Governance & Optimization	Access controls, monitoring, exception management, testing, and continuous improvement.

Service Pillars & Technology Ecosystem

What DesIDEA delivers across the AI automation stack

Capabilities / Service Pillars - What DesIDEA Delivers

AI AGENTS & COPILOTS
Intent understanding, approved knowledge, tools, and controlled business actions.

DOCUMENT INTELLIGENCE
Invoice, PO, contract, and form extraction with validation and routing.

CLOUD WORKFLOW AUTOMATION
Power Automate orchestration for approvals, sync, and case management.

DESKTOP RPA
Power Automate Desktop for legacy UIs with exception handling.

ENTERPRISE INTEGRATION
SAP, M365, SharePoint, Dataverse, APIs, queues, and custom services.

AI SEARCH & KNOWLEDGE
Grounded assistants over enterprise documents and approved sources.

PROCESS DISCOVERY
Assess feasibility, value, risk, and readiness before building.

HUMAN-IN-THE-LOOP CONTROLS
Approvals for financial, legal, HR, and other high-impact actions.

Architecture Layers in Detail

Layer	Role
Experience	Web, mobile, Teams, portals, email, and chat channels where users interact.
AI & Knowledge	LLMs, agents, prompts, classification, summarization, and grounded retrieval.
Orchestration & Execution	Power Automate, API calls, desktop RPA, notifications, and transactional updates.
Security & Observability	Identity, RBAC, secrets, audit logging, run history, evaluation, and alerts.

Technology Ecosystem

Service	Purpose
Power Automate / Desktop	Cloud workflows and desktop RPA for repeatable work
Power Apps | Dataverse	Low-code apps and business data foundation
Copilot Studio	Agents, knowledge, tools, and agent flows
Azure AI Services	Document intelligence, speech, vision, and model hosting
Azure Integration	APIM, Logic Apps, Service Bus, Event Grid
SAP / SAP BTP	Enterprise process backbone and clean-core extensions
Microsoft 365 | SharePoint	Collaboration, documents, and knowledge sources
Playwright (QE)	AI-assisted quality engineering for web workflows

Use Cases by Business Function

Where AI-powered automation creates measurable outcomes

Finance & Accounts Payable

- Invoice capture, extraction, and PO matching
- Approval routing and exception classification
- Vendor communication drafts with human review

Procurement

- Purchase request intake and policy checks
- Supplier document processing
- RFQ/RFP assistance and approval workflows

Sales & CRM

- Lead enrichment and opportunity summaries
- Proposal/RFP assistance
- CRM updates and follow-up task automation

Customer Service

- Agent assist and knowledge-grounded answers
- Case classification, routing, and escalation
- Response drafting with approval gates

HR & IT Operations

- Employee Q&A, onboarding, and document collection
- Ticket classification and access-request workflows
- Incident summaries with governed remediation

SAP / ERP Operations

- Document-to-transaction processes
- Master-data workflow support
- Cross-system synchronization with approvals

Business Benefits & Outcomes

- Lower manual effort on repetitive, high-volume activities.
- Faster cycle times across multi-system and multi-approval processes.
- Better consistency through standardized workflows and controlled rules.
- Improved access to enterprise knowledge via grounded AI experiences.
- Scalable operations - more volume without linear headcount growth.
- Visibility through run history, monitoring, and process metrics.

Delivery Methodology

1 DISCOVER
Map process, systems, users, data, exceptions, and target outcomes.

2 ASSESS
Score value, feasibility, complexity, risk, and data readiness.

3 DESIGN
Define AI boundaries, security, approvals, monitoring, and metrics.

4 BUILD
Implement workflows, agents, integrations, IDP, and RPA.

5 VALIDATE
Test normal/exception paths; evaluate AI; verify permissions.

6 DEPLOY & OPTIMIZE
Controlled release; measure results; refine prompts and coverage.

Governed Delivery & Proven Outcomes

Human-in-the-loop engineering with measurable anchors

Security, Governance & Responsible AI

- Least privilege - agents and workflows get only required data and tools.
- Human approval for financial, legal, personnel, and security-sensitive actions.
- Ground AI in approved enterprise knowledge - not unverified model memory.
- Secrets, identity, environment separation, and audit logging by design.
- Monitor failures, agent behavior, model changes, and business outcomes continuously.

Governance, Risk & Responsible Delivery

Area	Practice
AI accuracy	Evaluation sets, grounding, validation rules, and human review for high-impact outputs.
Access control	Identity, RBAC, segregation of duties, and constrained tool access for agents.
Exception handling	Retries, dead-letter queues, escalation, and manual fallback from day one.
Change management	Version control, ownership, regression testing, and lifecycle governance.
Cost & performance	Fit-for-purpose models; minimize unnecessary AI calls; monitor consumption.

Why DesIDEA | Competitive Differentiation

DesIDEA connects AI and automation to the enterprise technology landscape - Power Platform, Azure, SAP, and quality engineering - rather than treating AI as a standalone chatbot:

ENTERPRISE STACK
Power Platform, Azure, SAP, M365, and custom engineering.

HYBRID PATTERN
AI for interpretation; deterministic automation for transactions.

HUMAN-IN-LOOP
Approvals and review gates for high-impact actions.

END-TO-END
From assessment and architecture through build, test, and support.

Advantages

- Less manual effort on high-volume work.
- Faster multi-system cycle times.
- Consistent, auditable workflows.
- Scales volume without linear headcount.

Limitations & Considerations

- AI outputs need validation for high-impact decisions.
- Quality depends on process stability and data.
- Legacy UIs may need more fragile desktop RPA.
- Not every process should be automated.

READY TO AUTOMATE WITH GOVERNANCE?

Talk to DesIDEA - we'll assess high-value opportunities, design AI boundaries and controls, and build production-ready automation you can trust.

support@desidea.com | www.desidea.com
© DesIDEA. All rights reserved.