Approved-tool register

A fictional accountancy practice records the tasks its team may do and who can approve a change.

Tool and task	Permitted information and review	Decision and owner
Workplace assistant Draft client updates	Use public guidance and fictional examples. An accountant checks wording and figures against approved sources before sending.	**Approved with checks** Practice manager
Internal summary assistant Summarise meeting notes	Use redacted notes from the pilot team. The preparer compares the summary with the original before filing.	**Limited pilot** Operations lead
Invoice-processing add-on Explore document capture	Keep live invoices out until the supplier terms, access and retention have been reviewed and signed off.	**Awaiting approval** Practice partner

When a tool or its terms change

The owner updates the entry, records the decision date and tells the people who use the tool.