
Build a Governed Agent

The follow-on to the flagship. A small group takes one of the processes the team chose, usually a reconciliation, a load validation, a missing-mapping proposal, or the morning digest from the close calendar, and builds it into an agent a second person can run and reproduce. The deterministic parts become code with tests. The AI parts read exceptions and draft explanations. Nothing lands in a system of record without an approval, and every run is logged. Systems people work in Claude Code, which is what this course runs on; process owners work with a skill file and a script. Both leave with the same documented, governed agent.

This is instructor-led, hands-on training. Trainees have access to a qualified instructor for the full duration, in the room or live online, and for questions by email for thirty days after.

LEARNING OUTCOMES

- One documented, governed agent: connection, rules as code, AI for the exceptions and the narrative, an approval gate, a log, a schedule.
- A validation script for a load file, or a reconciliation between two exports that reports what changed, written and tested.
- A rules file and a README that let a second person run it and a third person audit it.
- The judgement to know which of the chosen processes belong in code, which belong to the AI, and which stay with a person.

OUTLINE · 2.5 HOURS (150 MINUTES OF INSTRUCTION)

1. 15 min **Pick the process and draw the boundary**
 - One of the chosen processes. Inputs, outputs, who approves, where it logs.
 - The read-only boundary: what the agent may touch and what it may only propose.
2. 30 min **A connection instead of an upload**
 - Pointing the tool at a folder, an export, or a query instead of pasting.
 - The project rules file that makes it behave like a colleague who knows your platform.
 - Where it is reliable and where it is confidently wrong.
3. 35 min **Rules as code**
 - The deterministic core: sums, joins, as-of logic, thresholds, written as a script with tests.
 - The AI layer on top: read the exceptions, classify timing versus error, draft the note.
 - Generating the test cases nobody had time to write.

4. 40 min

The approval gate, the log, the schedule
 - Output lands in a review folder or an email, never in the ledger.
 - Every run writes what it did and why. The approval is the trigger for anything that posts.
 - Scheduling it, and the morning digest that says what ran and what failed.
5. 30 min

Can someone else run it
 - Swap seats. A second person runs the agent from the README.
 - What to fix so they can. Conventions: where the rules live, what gets committed.
 - The second chosen process, scoped.

AUDIENCE AND PREREQUISITES

Process owners and finance systems, reporting, and data people: the ones who will own the first two processes the team chose.

- A laptop with a terminal and a Claude login your organization allows for work; this course runs on Claude Code. Setup instructions come ahead of the course.
- The ranked list from the flagship course, and sanitized copies of the inputs for the process you are automating.

DELIVERY, COST, AND PROVIDER DETAILS

DATES AND TIMES

One session of 2.5 hours. Start and end date and time are set with the employer at booking and shown on the quote.

NUMBER OF PARTICIPANTS

Minimum 5, maximum 8 per session.

TRAVEL

None.

INSTRUCTOR

Neil Perejma, Principal, EPM ONE Consulting Ltd.

- Principal, EPM ONE Consulting Ltd. (incorporated 2016)
- 20+ years delivering Oracle EPM Cloud and Hyperion finance systems, including hands-on training for every implementation
- Daily practitioner of Claude, Claude Cowork, and Claude Code for finance-systems automation since 2024

DELIVERY METHOD

In-class at the employer’s premises in Calgary, or virtual (live, instructor-led) on Zoom or Microsoft Teams.

COST PER PARTICIPANT

\$1,100 CAD. Session total \$5,500 CAD for up to 8 participants (minimum 5 billed). GST extra.

TRAINING CATEGORY

Technical (automation); Digital and Technological (data, digital tools)

TRAINING PROVIDER

EPM ONE Consulting Ltd.
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ON COMPLETION

Each trainee receives a certificate of completion by name. The employer receives a paid invoice showing cost and payment date, and a letter confirming trainees and completion by name, the business day after the session. Trainee personal information for the grant application is submitted by the employer to the Alberta portal directly; EPM ONE Consulting Ltd. does not collect it.