
Claude Code for Finance Systems

For finance-systems people who script and have already built one governed agent. The morning takes one process from the team's list all the way: a connection to the source instead of an upload, the deterministic core as code with tests, an MCP link to a system where it helps, an approval queue, a log, and a schedule. In the afternoon each person builds a second process alone from its card, with a partner reviewing. The last hour writes the team's conventions: the rules file Claude Code reads, the repository layout, how credentials are handled, what gets committed, and the README standard that lets a colleague run any agent cold. The team leaves with two agents running and the standards to build the next ten. This course runs on Claude Code.

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 process running end to end: connected to its source, deterministic steps in tested code, AI for exceptions and narrative, an approval queue, a log, a schedule.
- A second process built by each person alone in the afternoon, reviewed by a partner, and running.
- The team's Claude Code conventions in a repository: rules file, layout, credential handling, commit discipline, README standard.
- The judgement to scope the next ten: which of the team's processes belong in code, which belong to the AI, and which stay with a person.

OUTLINE · 6 HOURS (360 MINUTES OF INSTRUCTION)

1. 30 min **The boundary, the setup, the standards**
 - One process from the team's list. Inputs, outputs, who approves, where it logs.
 - Project setup and the rules file that makes Claude Code behave like a colleague who knows the platform.
 - What credentials never look like. A real example, sanitized, from an archive.
2. 60 min **Connection, code, tests**
 - A query or a watched folder instead of a paste.
 - The deterministic core, sums, joins, as-of logic, thresholds, as a script with tests Claude Code writes and you review.

- The AI layer on top: read the exceptions, classify, draft the note.

3. 45 min

Systems, approval, log, schedule

- An MCP link to a system where it helps; a read-only boundary where it does not.
- Output to a review queue, never a ledger. The approval is the trigger for anything that posts.
- Every run writes what it did and why. Scheduling it, and the morning digest.

4. 45 min

Run it, break it, fix the card

- First scheduled run in the room. A planted failure. The log finds it.
- Fix the card and the rules, not the prompt. Rerun.
- A second person runs it from the README.

5. 90 min

Your second process, alone

- Each person takes a card from the team's list and builds the agent solo.
- Partners review each other's code, log, and approval gate at the halfway mark.
- Neil circulates. Nobody gets code written for them.

6. 60 min

The team's conventions

- The conventions repo, written together: rules file, layout, credentials, what gets committed, README standard.
- Where the agents live, who owns each, how a new one gets added.
- What to do when it gets bigger than a script.

7. 30 min

The next ten

- The team's list, re-ranked with what it now knows.
- Which belong in code, which to the AI, which stay with a person.

AUDIENCE AND PREREQUISITES

Finance systems, reporting, and data people who already script, and who have taken Build a Governed Agent or run something equivalent.

- A laptop with a terminal, Claude Code installed, and a Claude login your organization allows for work. Setup instructions come ahead of the course.
- Build a Governed Agent, or the equivalent: you have built at least one scheduled, logged agent with an approval gate.
- The team's ranked list and sanitized inputs for two processes on it.

DELIVERY, COST, AND PROVIDER DETAILS

DATES AND TIMES

One session of 6 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

\$2,500 CAD. Session total \$12,500 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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Phone on request
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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.