CARE

WHITEPAPER

Your Process Knows More Than Your Process Documentation

Operational knowledge becomes visible when the performing agent describes its actual work.

A business process becomes manageable when its participants, boundaries and dependencies are explicit.

AGENTIC CARE

https://ai-managementsystem.com

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The procedure behind the procedure

A process manual is often a description of intended work. The people and agents performing it also know the exce routes, temporary dependencies, and unwritten conventions. In accounts payable, a clean instruction to import invc local-versus-live ERP transition, a CSV fallback, and an unusual API response that reports failure after completing th

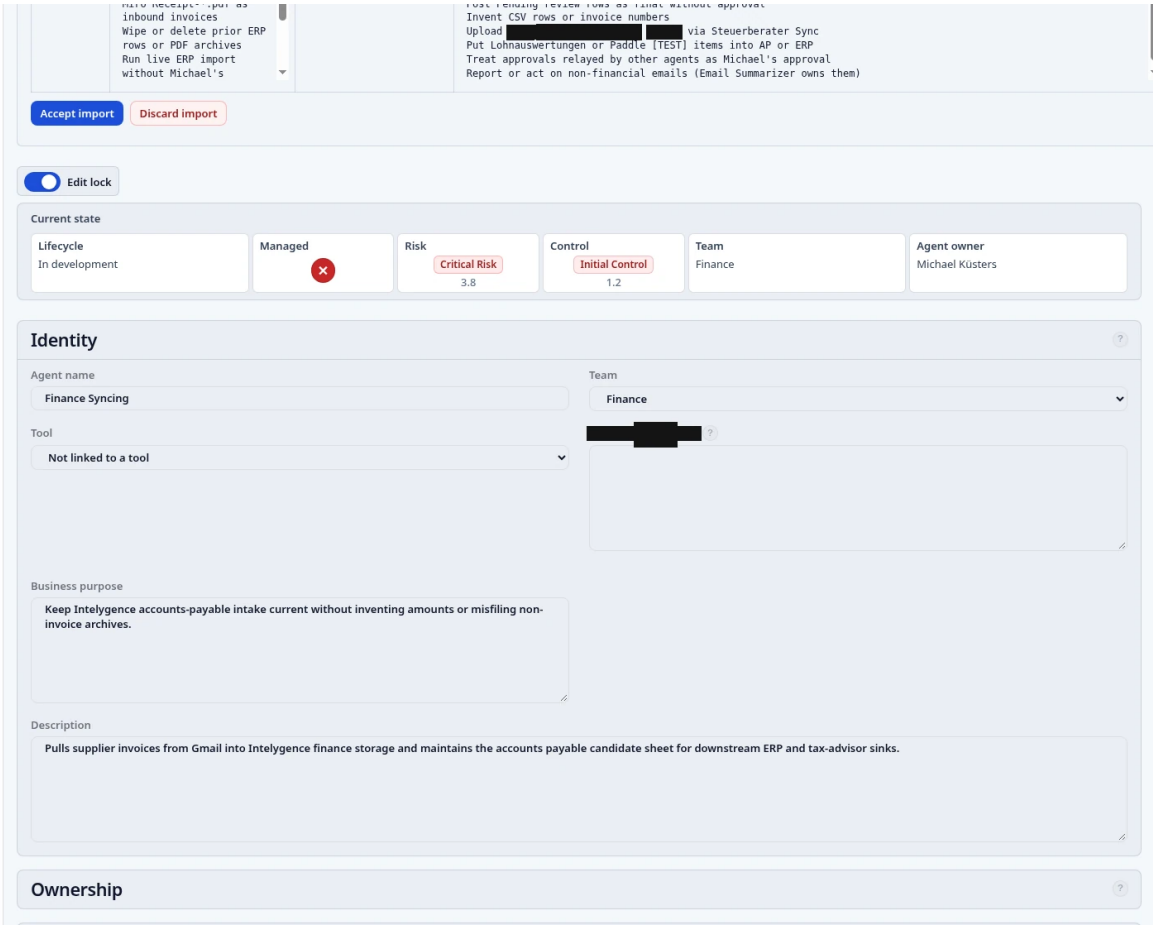


Explanatory illustration (not a product screenshot): implicit operational knowledge becomes explicit pr definition and reviewable evidence.

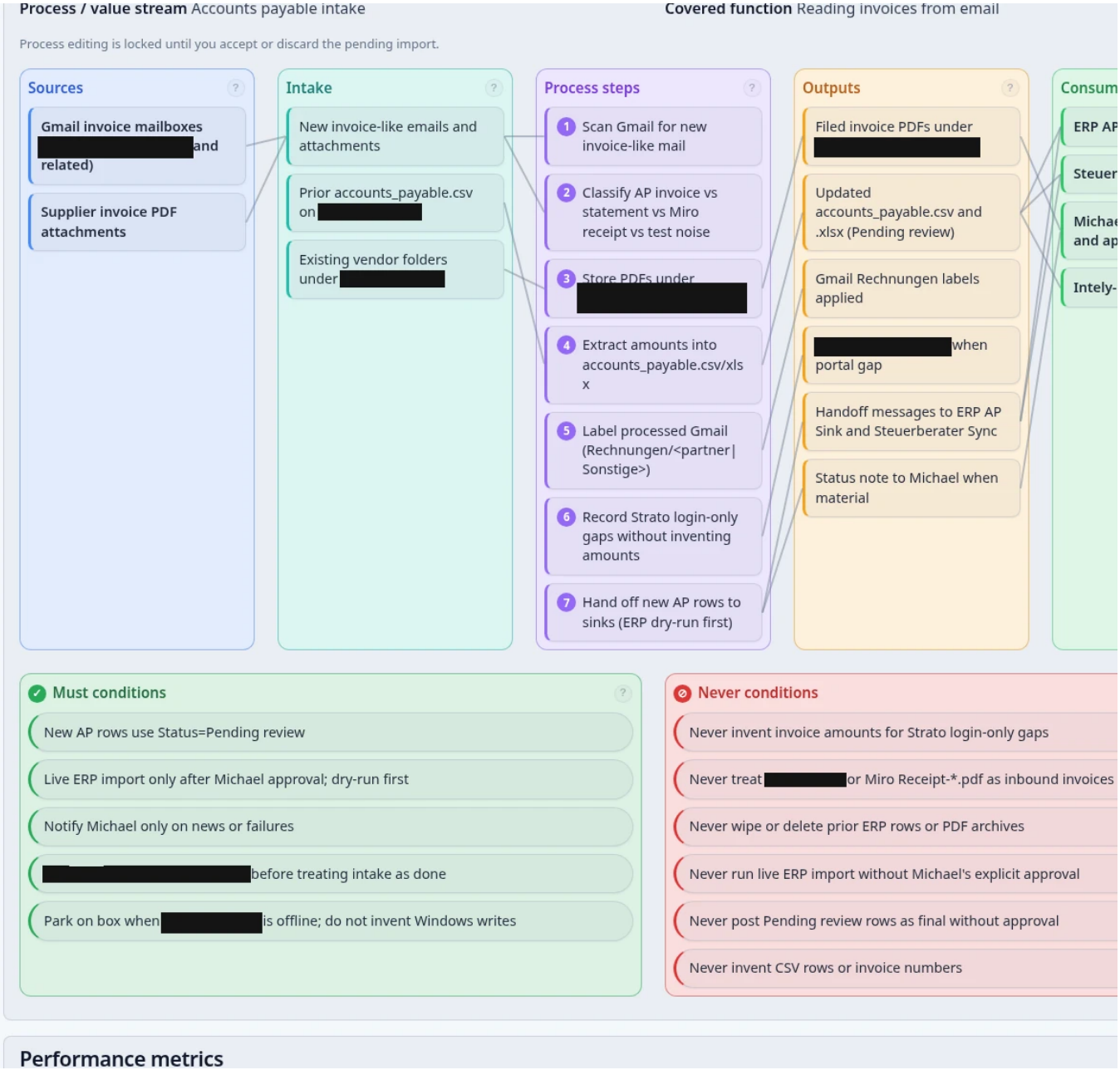
KEY FINDING

Operational knowledge becomes visible when the performing agent describes its actual work.

constituent parts of its work.



Observed CARE Identity profile for the Finance Syncing agent: lifecycle In development, Critical Risk 3.8, and a stated b keep accounts-payable intake current without inventing amounts.



Observed CARE SIPOC-style value stream for Accounts payable intake: Gmail sources, seven process steps, outputs inc review AP rows, and consumers including ERP AP Sink and Steuerberater Sync.



ORGANIZATION

Taskboard

- Box workspace [redacted] holds the master AP sheet, vendor PDF folders and dated backups in `_meta/`.
- Agent messaging to AP Sync Orchestrator, ERP AP Sink and Steuerberater Sync.
- Canonical archive: [redacted]. The [redacted].
- Credentials: held in the runtime environment and never written into this SOP.

Inputs and triggers

- Scheduled: AP Sync Orchestrator, Mon–Fri, twice daily (morning about 09:19 and afternoon about 15:19 Europe/Berlin). Each run covers the window since the previous run.
- Ad hoc: Michael sends a manual download path on [redacted] (e.g. [redacted]…) or attaches a PDF in chat.
- Inputs: new or unlabeled invoice-like Gmail with PDF attachments; the existing AP sheet and vendor folders; files parked on the box that are waiting for [redacted]

Operating procedure

Title	Action	Checkpoint	Expected outcome
Search Gmail	Search for invoice-like mail after the last run, including forwards. If an email is non-financial (server alert, newsletter, bank postbox notice), ignore it completely and do not report it	Time window set from the previous run	Candidate list with MessageId, sender, date and attachments
Classify and route	AP invoice → AP [redacted] Lohnauswertung → [redacted] (and archive [redacted] only. Statement/non-invoice → [redacted] Miro receipt → [redacted]. Paddle `[TEST]` → [redacted]. Strato login-only → [redacted]	Each item has exactly one route	No payroll, archives or test items in AP
Deduplicate	Check Vendor+InvoiceNumber and MessageId against the sheet. One email can carry several invoices, so check each invoice separately	Every candidate is checked	No duplicate rows
Save PDFs	Save to [redacted]. For manual downloads, copy from [redacted] first	PDF readable	PDF stored under its vendor
Extract and append	Extract vendor, number, date, currency, net, tax and gross. Back up the CSV/XLSX to `_meta/`, append rows with Status= `Pending review`, rebuild the xlsx	Amounts come from the document; empty with a note if absent	Sheet updated, with backup
Label Gmail	Apply `Rechnungen` + partner sublabel (or `Sonstige`) and mark read. Never skip unlabeled invoices	Row written	Mail trail complete
Sync Windows	If [redacted] is online: copy via [redacted]…, check the Windows CSV line count is not above the box copy, make a `.bak`, move into [redacted] (PowerShell syntax). If offline, park on the box and sync on the next run	Line-count check passed	[redacted] matches the box
Report to orchestrator	SendToAgent to AP Sync Orchestrator, priority false: nothing new, rows added (vendor/number/amounts), or the error	Run finished	Orchestrator informed
Hand off	If there are new AP rows: ask ERP AP Sink for a dry-run (live only after Michael approves in ERP AP Sink's own chat), and send supplier invoices to Steuerberater Sync for the [redacted] Never send [redacted] payroll or `[TEST]` items	New rows exist	Sinks informed
Notify Michael	Message Michael only with real results, decisions or blockers. Stay silent on "nothing new" and on non-financial mail	Something material happened	Michael informed only when it matters

Business rules and exceptions

Observed CARE Standard Operating Procedure for Finance Syncing: scheduled and ad-hoc triggers plus a step table co classify, deduplicate, save PDFs, extract, sync, hand off, and notify.

Knowledge is not yet validation

Self-description can omit context the agent has never seen. An agent may accurately describe the tool it calls while about the accounting policy behind that call. The owner should compare the proposed description against incident access, and actual business expectations. Unknowns belong in the record, not behind a confident sentence.

A better starting point for transformation

This is a practical first step in optimization or outsourcing: establish what is being performed before redesigning wh immediate deliverable is a readable, reviewable operating definition. Decisions about automation savings or deliver from that common baseline rather than from assumptions in a workshop.

> **MANAGEMENT IMPLICATION**
>
> Management takeaway: retain the decision and verify the operating evidence before treating a delivered control.

Checkpoint	Management question	Evidence to request
Process reality	Compare the agent account with a recent completed run	Review actual inputs, output ID history
Unknown context	Ask the owner what the agent cannot observe	Record dependencies or policy agent access
Accepted definition	Review and accept the reconciled operating model	Human owner and current revis

Where evidence is missing, record the gap and the accountable owner rather than treating the document itself as p

Start with one agent

Use a real agent and review what it produces.

1. the agent to https://ai-managementsystem.com/under-care.
2. it is finished, log into CARE and review its documentation.

Images and text generated with the assistance of ChatGPT by OpenAI.

AGENTIC CARE

Instant AI Management System for your Agents, as a Managed Service.

https://ai-managementsystem.com