AI agents for the work around the case and the decision

Agents that read your case files, your forms, your procedures and your providers' reports, prepare the work, and stop for a named case officer. On infrastructure you control.

THE PROBLEM

Of 15 public operations workflow templates we opened, 2 hold every item for a person, 5 do so only in part and 7 have no such step. Of 150 public interface descriptions, 146 import and 4 are over the import limit; the 146 give 16,358 operations, 9,196 sent as changes, so tools are chosen one by one.

HOW IT WORKS, IN THREE STEPS

STEP 01

Connect what the agent may read.

Procedures, work instructions, the quality manual, checklists and continuity plans become knowledge sources, with each reader's permissions kept. The case system, the document store and the registers are reached through the description of an interface you already run; case files and providers' reports are uploaded by the person who holds them.

STEP 02

Decide where it stops.

Every tool call passes your policy. A tool that would record a decision, send a letter or change a record waits for a named person.

STEP 03

Run it where the case files live.

In your data centre or your private cloud, on a model you serve.

THE RULE EVERY AGENT FOLLOWS

It prepares. A named case officer decides.

Thirty-five agents in nine areas

Case intake and processing	Case Intake Triage. Case File Completeness Check. Case Summary. Decision Letter Draft
Documents and forms	Document Sorting. Form Data Check. Document Comparison. Records Retention Check
Procedures and knowledge	Knowledge. Procedure Draft. Procedure Impact Check. Training Note Draft
Quality and process audits	Quality Sample Review Preparation. Process Audit Evidence Preparation. Nonconformity Report Draft. Corrective Action Follow-up
Exceptions and complaints	Exception Queue Summary. Repeat Exception Report. Complaint File Summary. Escalation Brief
Facilities and workplace	Workplace Request Triage. Work Order Preparation. Inspection Report Summary
Continuity and incidents	Continuity Plan Check. Operational Incident Timeline. Incident Notice Draft. Exercise Report Draft
Service providers	Service Provider Report Check. Outsourcing Register Check. Provider Review Pack. Exit Plan Check
Reporting	Operations Report. Backlog Ageing List. Project Status Draft. Document Generation

Also in the pack: the full list of what each agent reads and where it stops, and the white paper “AI agents inside the operations department”, with sources.

Seven questions to ask before an agent touches a case file, a decision or a record

01 Where does it run, and where is the model?

02 Does it act as the person using it, with that person’s permissions?

03 Which tools record a decision, send a letter or change a record, and does each wait for a person?

04 Are the read operations and the change operations separate tools?

05 Does it decide, close or recommend an outcome on a case, or does the case officer?

06 Does it score a case or a member of staff, or does the reviewer?

07 What is recorded, and can we stop one agent or all of them at once?

WHERE THE PLATFORM RUNS TODAY

In production at a top-tier bank in Asia, air-gapped, inside the bank’s own perimeter.

MODON built its AI Centre of Excellence on Katonic inside the Kingdom of Saudi Arabia.

ePLDT, the ICT arm of the Philippines’ largest telco, selected Katonic to power Pilipinas AI, a sovereign AI cloud hosted in the Philippines.

Where to start

One team, one kind of case, invented data first. A knowledge agent on your procedures can run on the first day, because no case is touched.

KATONIC.AI/SOLUTIONS/OPERATIONS