The three automatic actions, their withdrawal, and the role matrix

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Configuration in force, log of reworks and freezes · fictional document

Fictional document — demonstration example

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Fictional document, produced for the demonstration. **Three actions, not one more, and all three come undone. Everything else waits for a named decision** — this is the page to produce the day the council asks what the agent does without being asked.

The three actions the agent takes without asking

Action	What it does	How it comes undone	What it protects

1 — Qualified acknowledgement	**Every figure request receives, within the minute, the scope that will be used and the data cut-off date**	**The requester replies that this is not their scope: the request goes back out with theirs, and the exchange stays in the log**	**The relationship with the requester: they know at once whether they will get the answer to THEIR question — 74 requests reworked over the year, 6 indicator sheets born of those reworks**
2 — Put into checking	**Any figure that trips one of the scope rules in service goes to checking instead of going out for release**	**An officer sets it aside with a word; the figure goes back out for release with the reason and the date of the set-aside**	**Credibility in the chamber — and the set-aside reasons give, the following quarter, the rules to tighten**
3 — Nightly refresh and freeze	**The 11 indicators are refreshed every night on data cut off at the previous evening, with the cut-off date at the top**	**A dashboard freezes with a word on the date the summons goes out — and thaws with the same word**	**The figure no longer moves between summons and sitting: elected member and department talk about the same value**

> **Each of the three is reversible, and the reverse holds in all three cases.** A reworked request goes back out with the requester's scope; a set-aside figure goes back out for release; **a frozen dashboard thaws. A freeze is not a closed door** — it is a still frame you choose, and leave once the sitting has passed.

Everything else waits for a named decision

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Act	Who decides	What the agent brings
Releasing a figure outside the finance department	**The director of finance and performance**	The figure, its scope, its cut-off date, its query and its records
Opening a dashboard to a department or an elected member	**The chief executive's office**	The proposed role, what it would see, and a review date
Approving a paper put to committee	**The chief executive's office**	The draft paper, sourced record by record
Transmitting a statutory report	**The mayor**	The indicators extracted, dated, with their query
Creating or altering an indicator	**The director of finance**	The written sheet, its scope, and the measurement of what it would change across the history
Switching a control rule on or off	**The director of finance**	The written rule, run across 36 months, with its confirmed share
Exporting data out of the system	**The chief executive's office**	The list of what would be exported, and to whom

The role matrix — who sees what, and until when

Role	What it sees	What is not open to it	Review date
Elected member of the finance committee	**Aggregates of the main budget and the 3 ancillary budgets, execution by department, the 11 indicators**	**No named line, no individual file, no HR data below a grouping of 5 staff**	**End of term, or end of the committee concerned**

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Role	What it sees	What is not open to it	Review date
Elected member of another committee	The aggregates within that committee's scope	The rest	Same
Operational department	**Its own scope in detail, and the authority's aggregates to place itself**	The detail of other departments	**Annual review**
Finance and performance department	**All aggregates, the detail of every department, the read log**	Payslips, sickness reasons, bank details	Annual review
Chief executive's office	**All aggregates and the read log**	Same	Annual review
Any one-off opening for a committee	That committee's scope	—	**Closes when the committee has passed, unless decided otherwise**

Every consultation is logged — date, role, reason, object consulted — and **every opening carries a review date. An access right without a review date is an access right that gets forgotten**, and a role matrix that is never revisited ends up opening more than the authority intended. **The quarterly thirty-minute review brings the list of access rights that served no purpose: the decision to close belongs to the chief executive's office, the list comes from the agent unasked.**

Role matrix settled by the chief executive's office, on: _____

Access review frequency — proposed at three months — set at: _____

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