

Worksheet 9a.1: Agent Brief and Permissions Matrix

Companion to Elastic Intelligence, Chapter 9a

Name: Date:

How to use: Write this before connecting any agent to anything (Sections 9a.3 and 9a.11).

Brief element	Entry
Goal	
Context	
Permissions	
Limits (budget, scope, volume)	
Checkpoints	
Stop rules	
Report	
Owner	
Delegation rung (1–5)	

Resource	None	Read	Draft/prepare	Act with approval	Act within limits
Email					
Calendar					
Files					
Payments					
Customer/student/patient records					
Public posting					
Other: 					

Trust scorecard	Score 1–5
Accuracy	
Honesty	
Restraint	

Trust scorecard	Score 1–5
Transparency	
Recoverability	
Fit	

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