

User Groups and Working Collaboratively

Your access to the Affinitext library is via permission-based ‘user groups’ which controls both your access and communication with users within the library. This article explains how this works and how you can use this functionality to work collaboratively with other parties to the contract.

User Groups:

When you are given access to Affinitext, you are added as a member to one or more user groups. The user group permissions restrict the access to documents or ‘books’ in the library so that you only see the portion of the project to which you are entitled. For example, in a PFI project, the authority/state party may not see the finance documents or sub-contracts relating to the project, although they would be accessible by the Project Co party.

The user group permissions-based approach also limits who you can collaborate with in Affinitext, so that when using the Affinitext ‘Notes’, ‘Tasks’ and ‘Tracker’ functions, you can only ‘see’ and collaborate with other users in the user group(s) to which you belong. You collaborate by creating and sharing Notes, Tasks and Tracks with others in your user group(s). Similarly, you can see Notes, Tasks and Tracks created by others because they have created them and shared them with you.

This allows you unfettered freedom to use the functions in Affinitext to collaborate with users within your user group, without users in other user groups ‘seeing’ you or accessing the Notes, Tasks or Tracks which you have created and/or shared. We regard this as ‘working in silos’ where each party works side by side without interaction with the other party.

Collaboration:

Affinitext facilitates and encourages best practice collaborative working where there is more than one party with access to the same project in Affinitext. There are many benefits in being able to work collaboratively, for example, you can store and share reports and other documentation relevant to both parties and manage contractual obligations collaboratively. To do this you need to ‘see’ the other party in Affinitext to be able to collaborate with them when using the Affinitext ‘Notes’, ‘Tasks’ and ‘Tracker’ functions.

To allow collaborative working, in addition to the standard user groups, we make users members of clearly identifiable ‘Working Group’ user groups. These are user groups set up with access only to books common to both groups and include the users from both of the user groups. For example, where there is a State X user group and a Project Co Y user group, we would also create a ‘State X-Project Co Y Working Group’ user group which contains users from

both groups. When you want to share collaboratively with the other party you would be able to see the other party within the Working Group.

To collaborate within your team, create your Note Task or Track and share with your team's user group.

To collaborate with the other party, create your Note Task or Tracks and share with your Working Group user group.

After you have instructed Affinitext that you wish to work collaboratively with another party to the contract, the onboarding of users is adjusted to make users members of their own user group *and* members of the collaborative user group as default. If you do not wish new users to be added to the collaborative Working Group, please specify this when requesting access. Access may also be reviewed and amended on receipt of the regular audit reports.

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