

## AffiniTask Validation Process

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### 1 Introduction

Before AffiniTask goes live, you'll have a chance to review every obligation we've captured—before it becomes a task on the platform.

This is **validation**. It's your opportunity to verify accuracy, adjust assignments, and ensure AffiniTask is set up exactly how you need it.

This guide walks you through the validation process.

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### 2 When Validation Happens

After we've extracted obligations from your contracts, you'll have a validation window to:

- Review captured obligations before they become tasks
- Provide any Defined Dates you already know (see our guide: *AffiniTask and Defined Dates*)

Validation is a **one-time process**. Access is permission-based and time-limited.

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### 3 How to Access Validation

1. From the homepage, click the **Tasks** icon (top-right menu bar)
  2. Select Obligation Finder
  3. Choose your project
  4. Click **Open List** in the Obligations List box
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### 4 What You'll See: The Review View

When you open validation, you'll see the **Review** view by default. This shows all captured obligations and their details:

**Manage Obligations**

Export Selected (0) Delete Selected (0) Set Assignee Set Verifier Set Owner Set Collaborators Set Taskable

Name	Book	Chapter	Extraction Session	Pa...	Type	Date/E...	Repeat	Description	Created By	Modified By	Created At	Modified At
(Assistant Project Manager) (Calendar) EMERGENCY DRILLS	Appendix J Environmental Requirements and Mitigation Plan (Coordination Agreement)	EMERGENCY DRILLS	Project X - Session #1	Assist... Project Manag...	Calendar	2026-04-01	Monthly from first due date, until Recurrence End Date (EPC Contract Folder)	Ensure that emergency drills are carried out at...	Affinitext	John Smith	2026-03-06 21:47	2026-03-14 04:54
(Assistant Project Manager) (Calendar) EMERGENCY DRILLS	Appendix J ESMS Implementation Plan (Onshore Contract)	EMERGENCY DRILLS	Project X - Session #1	Assist... Project Manag...	Calendar	2026-04-01	Monthly from first due date, until Recurrence End Date (EPC Contract Folder)	Ensure that emergency drills are conducted at...	Affinitext	John Smith	2026-03-03 19:15	2026-03-19 18:46
(Assistant Project Manager) (Calendar) Project Manager/Assistant Project Manager	Appendix J Environmental Requirements and Mitigation Plan (Coordination Agreement)	Project Manager/A... Project Manager	Project X - Session #1	Assist... Project Manag...	Calendar	2026-04-01	Monthly from first due date, until Recurrence End Date (EPC Contract Folder)	Chair monthly project-wide HSSE meetings and...	Affinitext	John Smith	2026-03-02 18:45	2026-03-14 04:25

1 2 3 4 5 6 7 8 9 10 10 10 10

41 - 60 of 2028 Items

### Column guide:

1. **Name** – link to see full captured obligation
2. **Book** – link to the contract containing the clause
3. **Chapter** – link to the specific clause
4. **Extraction Session** – the document group being reviewed
5. **Responsible party** – who must action the task
6. **Type** – Task type - Calendar or Event Notice
7. **Date / Event** – The Target Date of when the task is due (or Defined Date placeholder)
8. **Repeat** – repeating schedule (if applicable)
9. **Action instruction** – AI-generated guidance on what to do
10. **Created and Modified details** – details of who created and/or modified the task with corresponding dates and times.

### 5 Other views:

- **Dates & Deadlines** – groups obligations by due date, recurrence, and end date

**Manage Obligations** 🔍 **Dates & Deadlines** Custom Filters

Export Selected (0)
Delete Selected (0)
Set Assignee
Set Verifier
Set Owner
Set Collaborators
Set Taskable

Name	Book	Extraction Session	Party	Type	Date/Event	Taskable	Calc. Target Date	Calc. Repeat End
(Assistant Project Manager)(Calendar) Project Manager/Assistant Project Manager	Appendix J Environmental Requirements and Mitigation Plan (Coordination Agreement)	Project X - Session #1	Assistant Project Manager	Calendar	2026-04-01	Monthly from first due date, until Recurrence End Date (EPC Contract Folder)	2026-04-01	2045-09-30
(Assistant Project Manager)(Calendar) Project Manager/Assistant Project Manager	Appendix J ESMS Implementation Plan (Onshore Contract)	Project X - Session #1	Assistant Project Manager	Calendar	2026-04-01	Monthly from first due date, until Recurrence End Date (Other Documents)	2026-04-01	2052-12-31
(Assistant Project Manager)(Calendar) Project Manager/Assistant Project Manager	Appendix J Environmental Requirements and Mitigation Plan (Coordination Agreement)	Project X - Session #1	Assistant Project Manager	Calendar	2026-04-01	Monthly from first due date, until Recurrence End Date (EPC Contract Folder)	2026-04-01	2045-09-30
(Assistant Project Manager)(Calendar) Project Manager/Assistant Project Manager	Appendix J ESMS Implementation Plan (Onshore Contract)	Project X - Session #1	Assistant Project Manager	Calendar	2026-04-01	Every 3 months from first due date, until Recurrence End Date (Other Documents)	2026-04-01	2052-12-31

Items per page: 20 | 41 - 60 of 2028 Items

- **Assignment** – shows who's assigned to each task (Assignee, Verifier, Collaborators)

**Manage Obligations** 🔍 **Assignment** Custom Filters

Export Selected (1)
Delete Selected (1)
Set Assignee
Set Verifier
Set Owner
Set Collaborators
Set Taskable

Name	Book	Extraction Ses...	Party	Type	Description	Owner	Assignee	Verifier	Collaborat...	Taskable
(Beneficiary)(Event)(Notice) 32.4 Injury to persons and property	Onshore Contract	Project X - Session #1	Beneficiary	Event	[Subject to Reserved Discretion] Promptly notify the Indemnifyin...	N/A	N/A	N/A	N/A	✓
(Beneficiary)(Event)(Notice) 32.4 Injury to persons and property	Offshore Contract	Project X - Session #1	Beneficiary	Event	[Subject to Reserved Discretion] Promptly notify the Indemnifyin...	N/A	N/A	N/A	N/A	✓
(Board of Directors)(Calendar) 5.2 General Meetings, quorum and call	Shareholders' Agreement	Project X - Session #1	Board of Directors	Calendar	Convene a General Meeting whenever required by law, the...	N/A	N/A	N/A	N/A	✓
(Board of Directors)(Calendar) 6.1 Reporting	Shareholders' Agreement	Project X - Session #1	Board of Directors	Calendar	Provide a financial statement and unaudited managem...	N/A	N/A	N/A	N/A	✓
(Board of Directors)(Calendar) 6.1 Reporting	Shareholders' Agreement	Project X - Session #1	Board of Directors	Calendar	Provide, within seven (7) business days after the end of each quart...	N/A	N/A	N/A	N/A	✓
(Board of Directors)(Calendar) 6.1 Reporting	Shareholders' Agreement	Project X - Session #1	Board of Directors	Calendar	Provide annual audited accounts of ProjectCo, prepared by the Audit...	N/A	N/A	N/A	N/A	✓
(Board of Directors)	Shareholders' Agreement	Project X - Session #1	Board of Directors	Calendar	Submit draft annual tax returns to the tax authorities.	N/A	N/A	N/A	N/A	✓

Items per page: 20 | 61 - 80 of 2028 Items

## 6 What to Do During Validation

Validation gives you confidence that we've captured the right obligations.

You don't need to read every detail—spot-check as you see fit using the links provided. But **do review obligations tied to unknown Defined Dates**, since these will become tasks automatically once you provide the date later.

## 7 Validation Actions

### How actions work:

You can act on individual obligations or multiple obligations at once. Select rows by ticking the checkbox, or use filters and select all matching results.

The screenshot shows the 'Obligation Finder' interface. At the top, there's a navigation bar with the Affinix logo and 'Obligation Finder' text. Below that, a breadcrumb trail shows 'Obligation Manager > Obligations'. A 'Manage Obligations' section includes buttons for 'Export Selected (1)', 'Delete Selected (1)', 'Set Assignee', 'Set Verifier', 'Set Owner', 'Set Collaborators', and 'Set Taskable'. A search bar is also present. The main area is a table with columns: Name, Book, Chapter, Extraction Ses..., Party, Type, Date/Event, Repeat, Description, and Created By. Three rows are visible, each with a checkbox in the first column. Annotations include a blue box labeled 'checkbox selection' pointing to the checkboxes, and another blue box labeled 'Filter each column via the 3-dots' pointing to the three-dot menu icon in the 'Type' column header.

Name	Book	Chapter	Extraction Ses...	Party	Type	Date/Event	Repeat	Description	Created By
(Board of Directors) (Calendar) 5.2 General Meetings, quorum and call			Project X - Session #1	Board of Directors	Calendar	2026-04-0	Every 3	...	Affinixtext
(Board of Directors) (Calendar) 6.1 Reporting	Shareholders' Agreement	Reporting	Project X - Session #1	Board of Directors	Calendar	2026-05-11	first due date, until Recurrence End Date (Other Documents)	Provide a financial statement and unaudited management accounts for ProjectCo, made up to and as ...	Affinixtext
(Board of Directors) (Calendar) 6.1 Reporting	Shareholders' Agreement	Reporting	Project X - Session #1	Board of Directors	Calendar	2026-07-09	Every 3 months from first due date, until Recurrence End Date (Other Documents)	Provide, within seven (7) business days after the end of each quarter, an unaudited balance sheet,...	Affinixtext

## 8 Remove an Obligation from Tasking

By default, all captured obligations are set to become tasks (green tick in the "Taskable" column). To prevent an obligation from becoming a task:

1. Switch to **Assignment** view
2. Select the row(s) by ticking the checkbox on the left
3. Click Set Taskable
4. Select Mark as Not Taskable
5. Click Apply to Selected

## 9 Assign Users to Tasks

You can assign one user per role (Assignee or Verifier):

1. Switch to **Assignment** view

2. Select the row(s)
3. Click Set Assignee or Set Verifier
4. Choose a user from the dropdown (or search by name)
5. Click Apply to Selected

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## 10 Add Collaborators

Collaborators can view tasks. We recommend assigning Collaborators at the user group level (you can select multiple groups):

1. Switch to **Assignment** view
2. Select the row(s)
3. Click Set Collaborators
4. Choose an allocation mode: **Add, Replace, or Remove**
5. Select user groups by ticking the group name
6. Click Apply to Selected

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## 11 What Happens After Validation

Once validation ends, we upload tasks for:

- **Event-triggered obligations** (all)
- **Date-triggered obligations** (where the date is known)
- **Defined Date obligations** (where you've provided the date)

Obligations tied to Defined Dates you haven't provided yet remain captured. Tasks will be created automatically when you enter the date.

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## 12 Adding Tasks Later

When a Defined Date becomes known, update it in the Defined Date User Interface. We'll create the related task automatically and notify you.

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## 13 Need Help?

Contact our support team: [support@affinixtextgroup.com](mailto:support@affinixtextgroup.com)

*For a printable version of this guide, download the PDF attached at the end of this article.*

## Document Version Control

Article Number:	AFHC01032
Authors:	Jem Fennell
Creation Date:	1 March 2026
Document Owner:	Jem Fennell
Approved by:	Affinitext Board of Directors
Date of last review:	31 March 2026
Reviewed by:	Jem Fennell
Date of next review:	1 March 2027