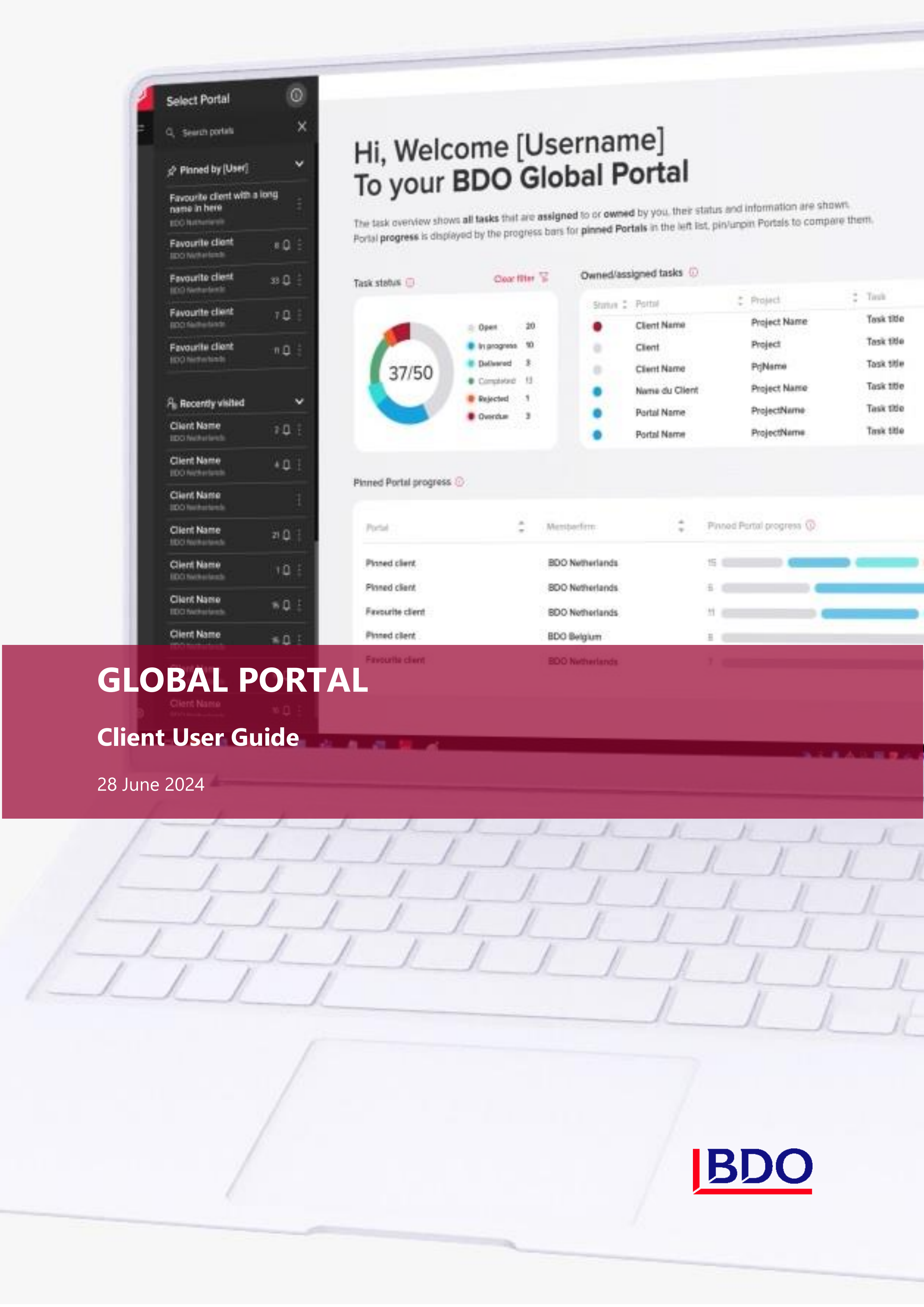



# GLOBAL PORTAL

## Client User Guide

28 June 2024

# CONTENTS

# DOCUMENT DETAILS

## VERSION MANAGEMENT

| Version | Date | Author | Nature of amendment |
|---|---|---|---|
| 1.0 | June 2024 | Maria Peicheva | Updated document based on Release 5.5 |

## REVIEWER

| Name | Version | Date |
|---|---|---|
| Maria Peicheva | 5.5 | 28 June 2024 |

## INTENDED AUDIENCE

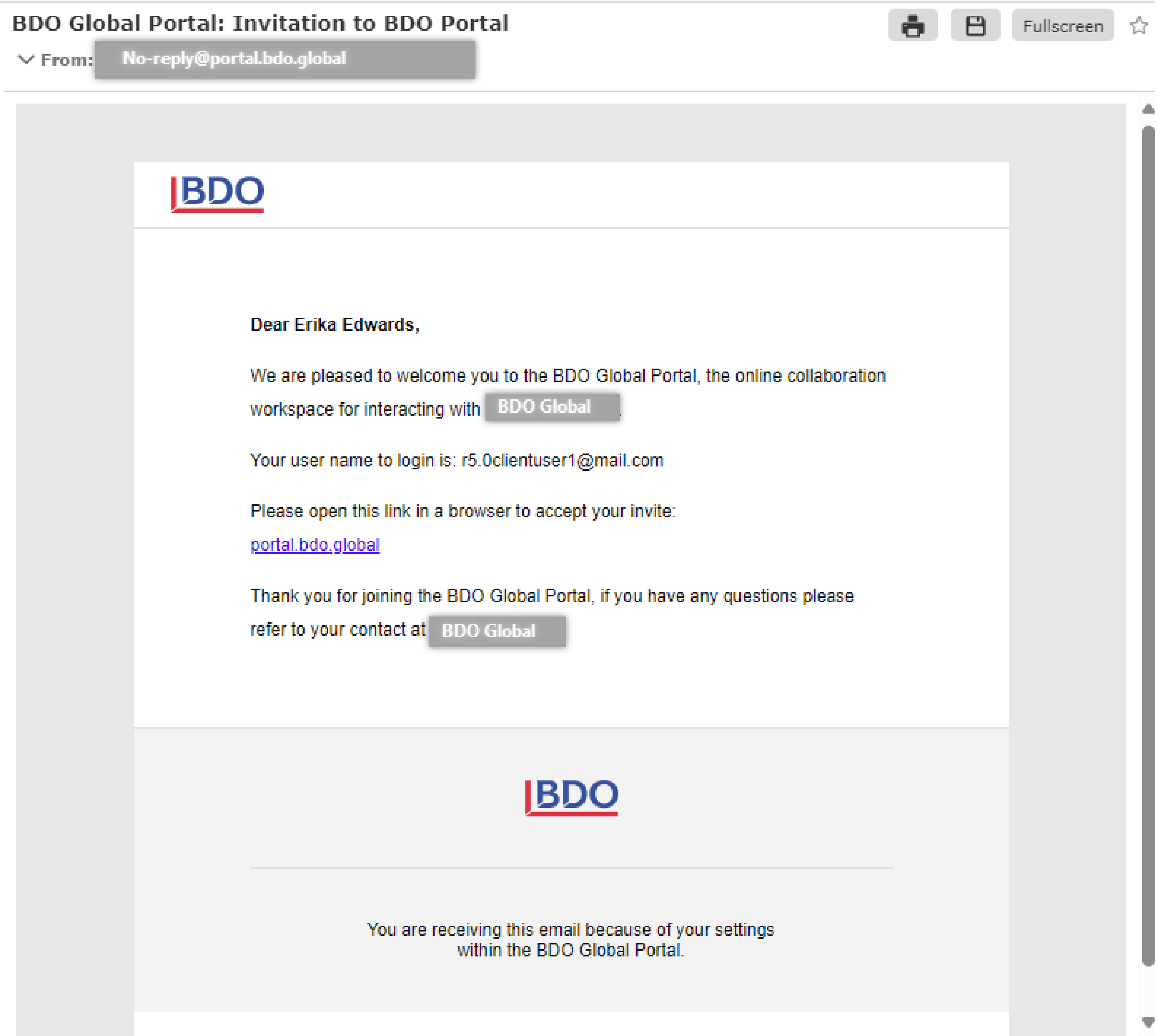
| Target Audience |
|---|
| BDO Clients |

# 1. PORTAL LOGIN

## 1.1 Login via an email invitation

If you are a new user, you can access Global Portal only after you have been invited to it by your BDO contact. You will receive an email invitation which you need to accept to be able to log in to Global Portal. A sample email is provided in the below screenshot.

**Please note**: Global Portal sends emails for notifications on projects where you are added. The email address these notifications are coming from is: **No-reply@portal.bdo.global**. Please add this email address to your safe recipients list.



BDO Global Portal: Invitation to BDO Portal

From: No-reply@portal.bdo.global

Fullscreen

BDO

**Dear Erika Edwards,**

We are pleased to welcome you to the BDO Global Portal, the online collaboration workspace for interacting with BDO Global.

Your user name to login is: r5.0clientuser1@mail.com

Please open this link in a browser to accept your invite:

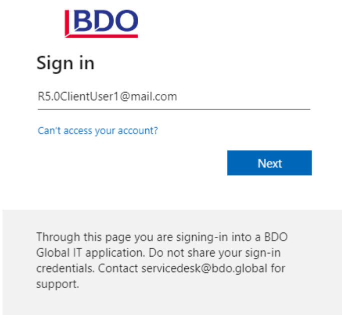
portal.bdo.global

Thank you for joining the BDO Global Portal, if you have any questions please refer to your contact at BDO Global

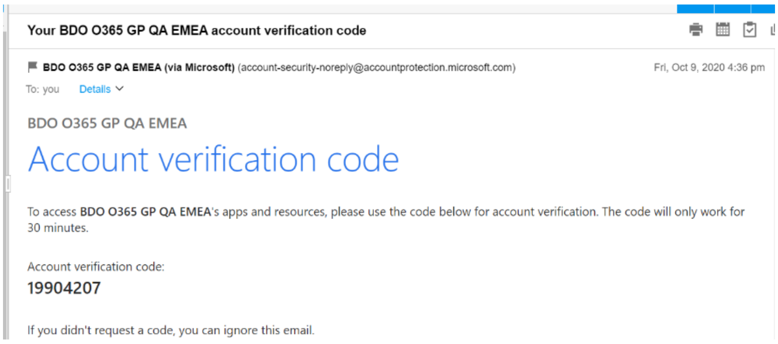
BDO

You are receiving this email because of your settings within the BDO Global Portal.

To accept the invitation, click the **portal.bdo.global** link in the invitation email and type in your email address in the authentication window.



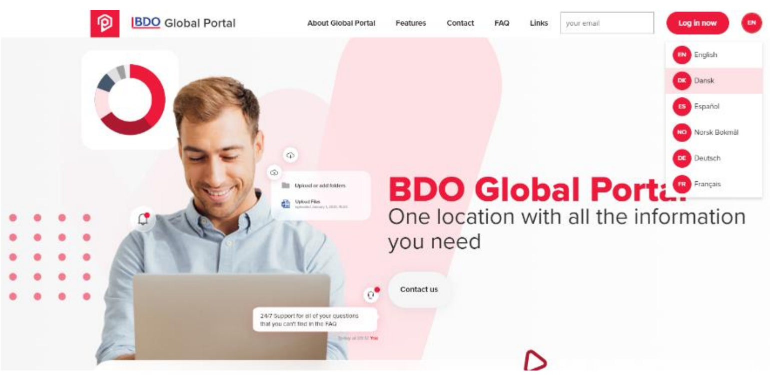

- If you are using a Microsoft account, enter your email and password.
- If you have a non-federated account such as Gmail, Hotmail, etc., the login process requires a one-time password (OTP). This one-time password (or "account verification code") is sent to your email and you need to use it to log in. A new verification code is generated on every visit to Global Portal.




- If Multi-factor authentication (MFA) is enabled for the tenant you are accessing, you need to complete additional authentication steps, such as entering a code from your Authenticator App (Microsoft Authenticator recommended) or receive a text message or a phone call.

**Note:** Multi Factor Authentication (MFA) is a digital security method enabled in some locations: you will be prompted during login to authenticate using your registered device. In some cases, a user is requested to complete MFA twice, this occurs when your account has its own MFA setting activated. This is the expected behaviour so please continue to log in as usual. If you want to review or change your account's MFA settings, visit Microsoft's secure page https://aka.ms/mysecurityinfo. Please reach out to your BDO contact, if you need further assistance with MFA.

## 1.2 Login via the landing page




Visit [https://portal.bdo.global](https://portal.bdo.global). Enter your email address and click the **Log in now** button. You will be redirected to the BDO login and authentication page where you need to log in with your email and password (see above). Refer to the **FAQ** section for troubleshooting login issues or guidance on getting started.

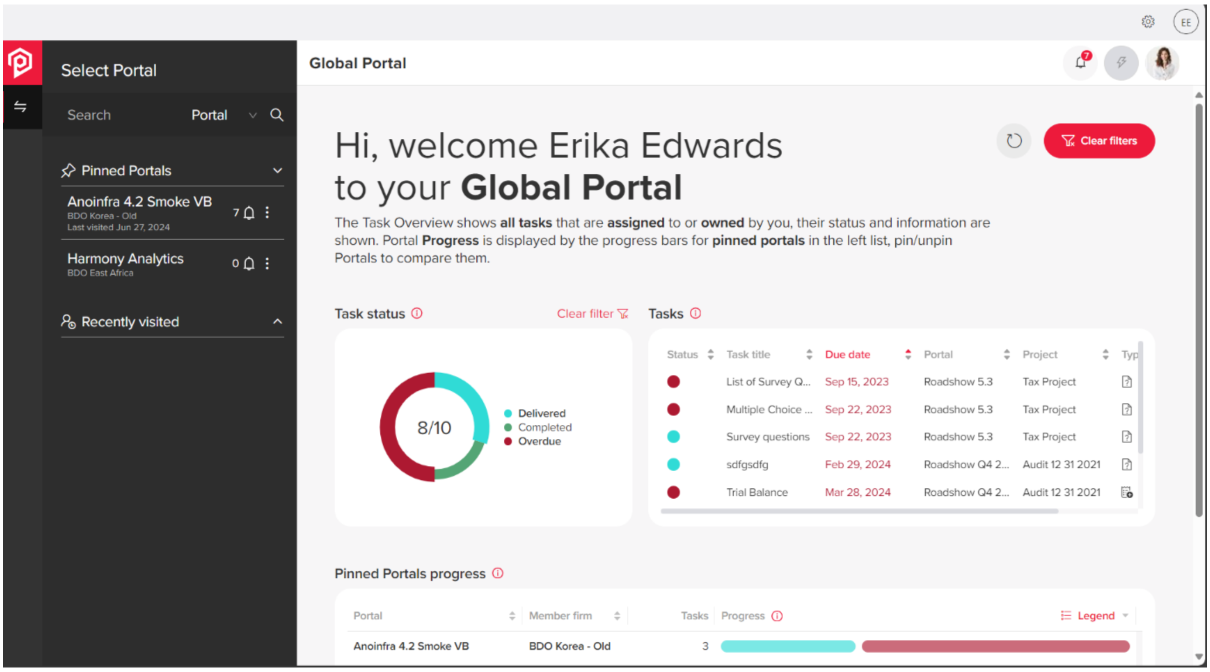
**Tip:** Add https://portal.bdo.global to your bookmarks for quicker access.

Please reach out to your BDO contact, if you experience any login difficulties. Alternatively, you can submit the **Contact Us** form on the page to contact the BDO Global IT Service Desk.

# 2. WELCOME PAGE

You have logged in from the Global Portal Landing page, so what's next?

If you are assigned to more than one Portal, the **Welcome page** appears. It lists the Portals you have access to in the left-hand black sidebar. See a summary of your tasks in the **Task status** and **Tasks** dashboards.



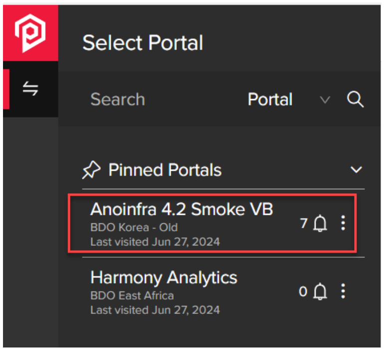

If you have **access to only one Portal**, you will be directed to the Portal's **Home page** (see below).

You can navigate back to the Welcome page by clicking the red Global Portal logo in the left upper corner of your screen.

Click on a Task name in the **Tasks** area to open the task and deliver the requested information.

Use the doughnut diagram in the **Task status** area to filter tasks by their status.

If you are assigned to more than one portal and you wish to open a specific portal, click the Portal name in the black sidebar on the left.



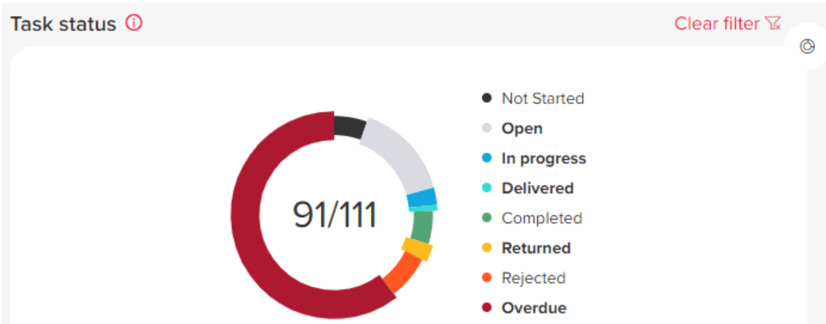

You can refine the list of Portals using the search field. Please note that the single quote (') character in the search keyword is not supported.

*Note: On the right side of each Client Portal there is a notification bell indicating the unread notifications count for that Portal.*

You can pin up to 5 Portals in the black sidebar that will then show in the Pinned Portals section. Pin and unpin portals via the three dots menu next to each portal name.

## 2.1 Tasks status dashboard

The **Task status** dashboard shows only the statuses that are assigned to you. If you have tasks labelled as "Open" and "Overdue," you'll see only these two statuses. If you have a task that's marked as "Completed," then the dashboard displays just that one status.




| ***TASK STATUS NAME*** | ***TASK ACTION*** |
|---|---|
| ***Not Started*** | *The task Start Date is in the future* |
| ***Open*** | *The task Start Date is in the past* |
| ***In progress*** | *When 1 or more file or comment is added (Request Task) OR not all assignees have completed their actions (Signing, Approval, Action Tasks)* |
| ***Delivered*** | *All information has been provided and the **Deliver** button was selected.* |
| ***Completed*** | *The information provided in the task satisfies the Request Task and the **Complete** button has been selected OR when all assignees have completed their actions (Signing, Approval, Action Tasks)* |
| ***Returned*** | *When the information provided does not satisfy the Request Task* |
| ***Rejected*** | *When any of assignees rejected the task (Signing, Approval, Action Tasks)* |
| ***Overdue*** | *When a task is not completed, and the due date is in the past* |

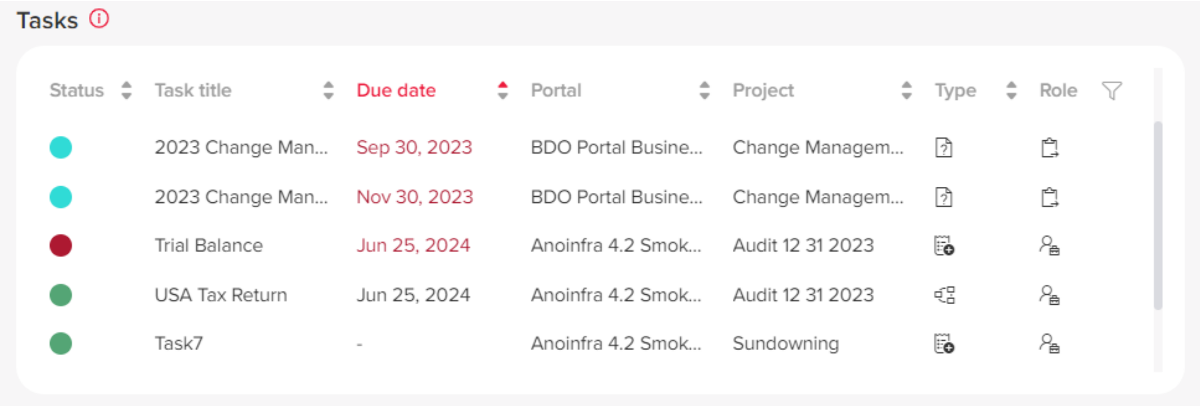
The **Clear filter** button clears all selections in the **Task status** and **Task** dashboards – all tasks are shown.

## 2.2 Tasks dashboard

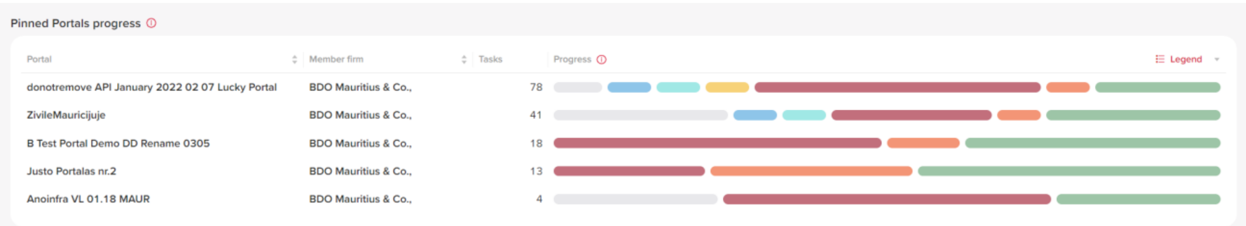
The **Tasks** dashboard shows a task list with the following columns: Status - a coloured bubble (hovering on the bubble shows the status name), Task, Due date, Portal, Project, Type, Role - as icon Owned or Assigned .

Click a Task name to open the task.




## 2.3 Pinned Portals dashboard

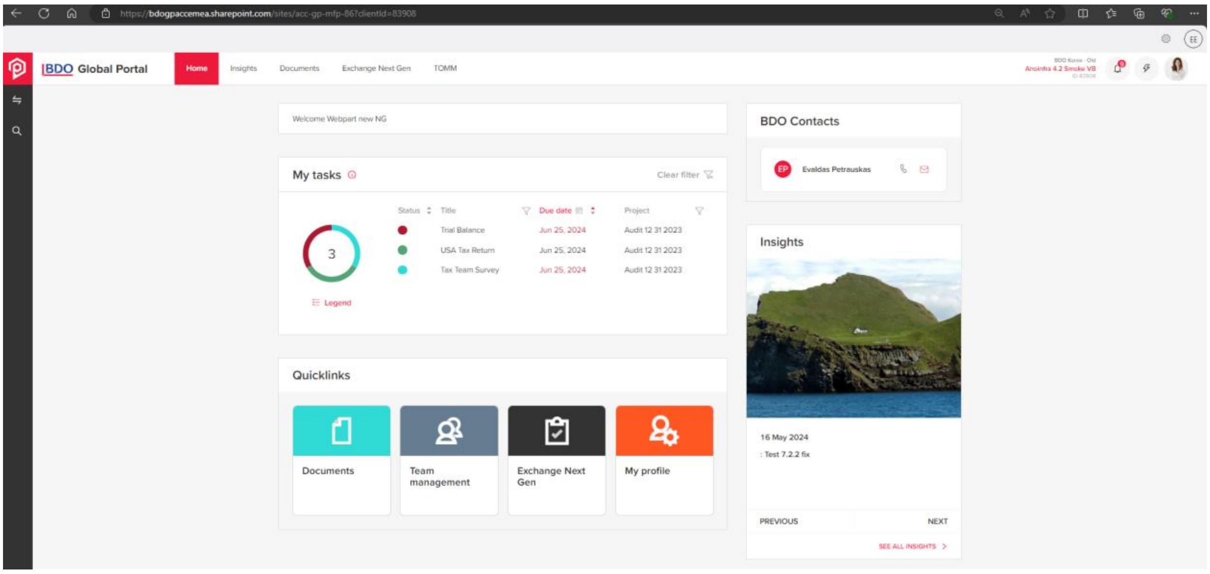
The Pinned Portal dashboard shows data for portals you pinned for quick access via the black sidebar.




The coloured pills are ordered left to right depending on the status of tasks. The size of the pill corresponds to the number of tasks with this status.

Click on a pill to view the tasks with this status within the portal.

# 3. PORTAL HOME PAGE

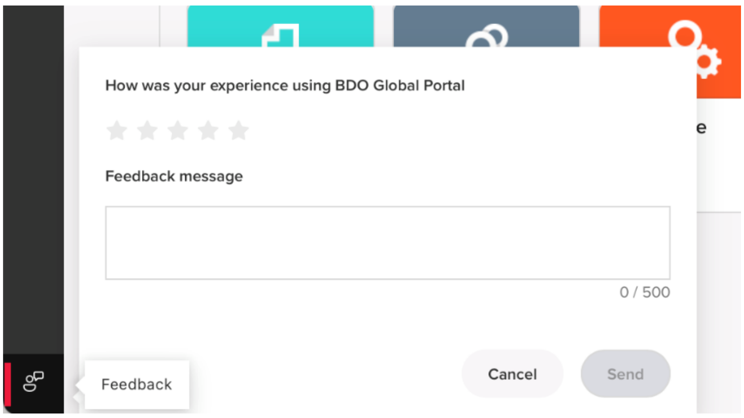



## 3.1 Black sidebar icons

Under the red Global Portal logo in the upper left corner of the screen you can find the search button . Pressing the magnifying glass icon opens the black sidebar where you can search for *Files in Documents* and *Tasks in Exchange Next Gen*.

Click the sidebar toggle button  to expand the black side bar and navigate to other portals.

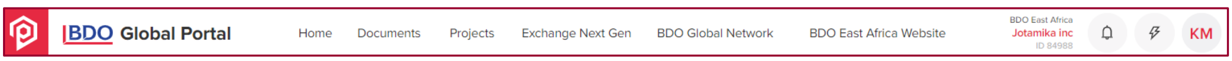
Click the feedback button  on the bottom right corner to submit your feedback and recommendations for improving Global Portal.




## 3.2 Main Navigation menu

The main navigation menu on the top part of your screen is customizable and contains:

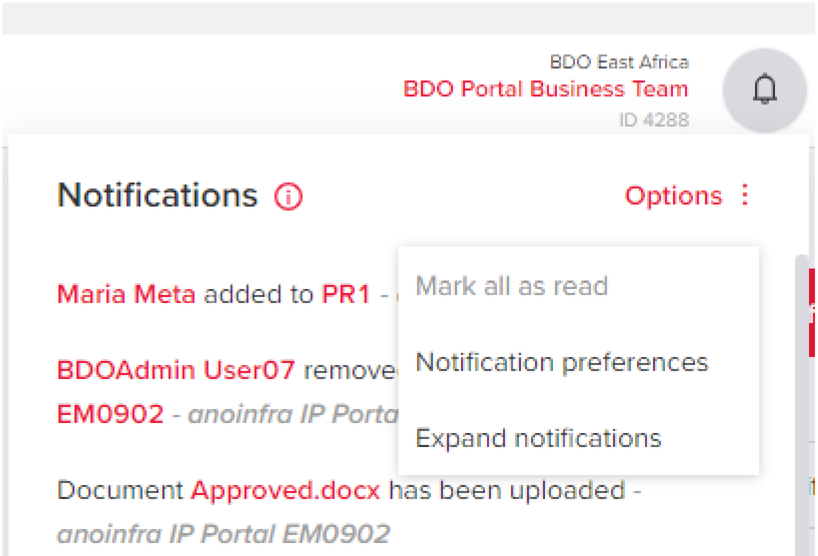
1. **Links**: Home, Documents, Projects, Exchange Next Gen, custom links



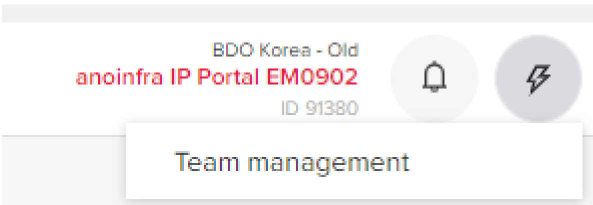
2. **Text block with navigation information**: Firm name, Portal name, Project ID


3. **Icon menus**: Notifications **Bell** icon, **Lightning Bolt** icon and **Profile photo circle** icon. The menus under these icons contain key options for managing your personal settings, notifications and team.


   a. Click the Notifications **Bell** icon to review all changes made to your projects and tasks, such as new users added, files uploaded etc. Under the **Options** menu, you can select **Mark all as read**, set your **Notifications preferences** or **Expand notifications** and open a page to sort and filter by notification type.




   b. Click the **Lightning Bolt** icon to access the **Team management** page. If you have been added as a Client Admin user, you can manage your team's access to specific portals and projects.



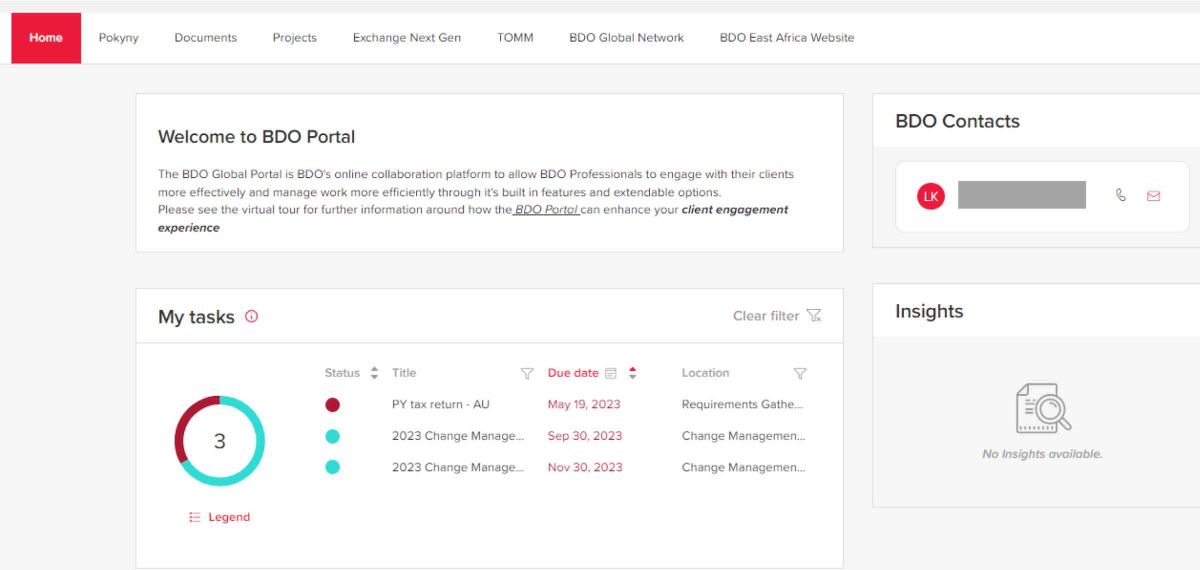

   c. Click the **Profile photo circle** icon to access your **Personal settings**, revisit **Virtual tour**, **Coaching**, **Terms and Conditions** or **Log out**. Please note that this menu is customizable and options may be different.

## 3.3 Welcome block and BDO Contacts

If the Welcome block is set up on the page, it appears on the left side of the home page. Information about your BDO contact(s) is displayed in the right top corner. Select the icons to the right of the person's name to view phone numbers and email addresses.

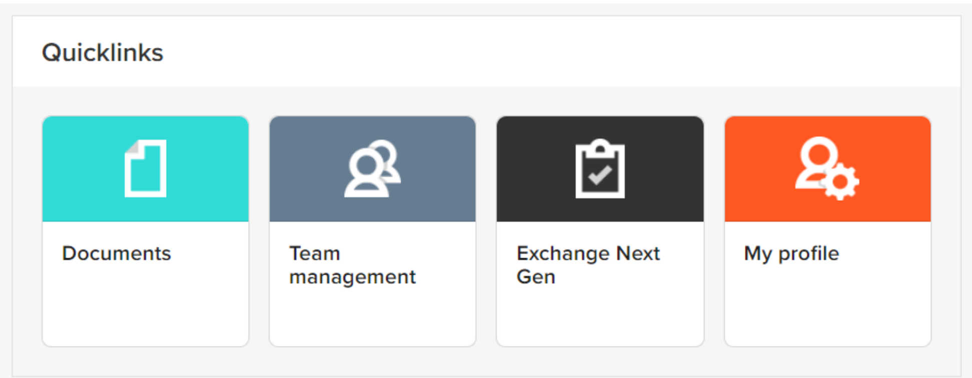
## 3.4 Home page dashboard

Each Portal Home page shows a **My tasks** dashboard. The dashboard lists the tasks to which you are assigned. Use the sort and filter buttons on each column to find a specific task.



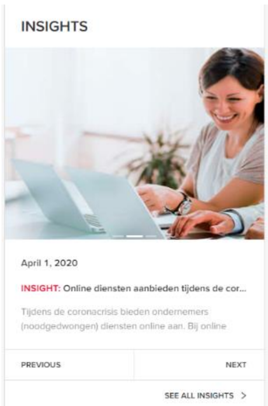

## 3.5 Quicklinks

The **Quicklinks** block appears under the dashboard and can vary per portal. Links in this block can direct you to apps within Global Portal or to external tools or pages.




## 3.6 Insights

Information appearing in **Insights** is extracted from the BDO Firm website. Click the **See all insights** link to display a page with more articles and options to set your preferences.



# 4. GETTING STARTED WITH DOCUMENTS

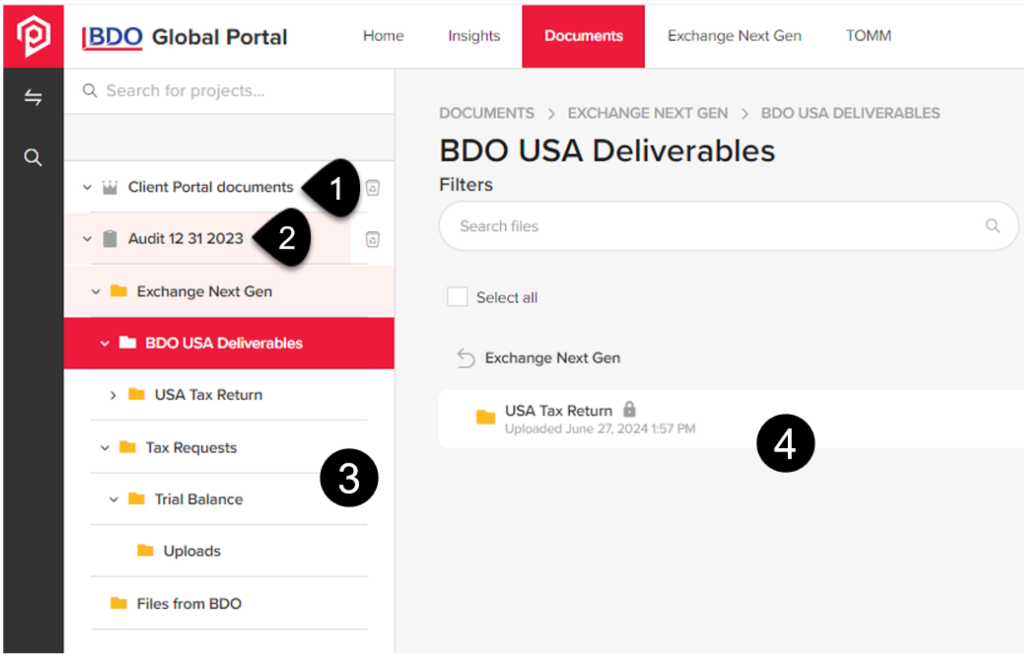
To access documents such as your financial statements, tax returns, letters, or other deliverables from BDO, select the **Documents** menu and see a list of projects and folders. Navigate to a particular project using the navigation on the left-hand side.

**Note:** The **Documents** library maybe turned off, if your BDO contacts are sending you task requests in **Exchange Next Gen** (see below). Use the library to download files or to collaborate on files with your BDO contacts. If you need to fulfil a specific task, navigate to Exchange Next Gen where a similar document tree is presented

## 4.1 Documents structure

On the **Documents** page you can view files on a portal or project level.

Project folders that were created in Exchange Next Gen are read-only (marked by the lock icon) and no upload is possible via the library. If you need to upload files and your permissions allow it, use the portal or the project level folder.




1 Portal level folder (crown icon)

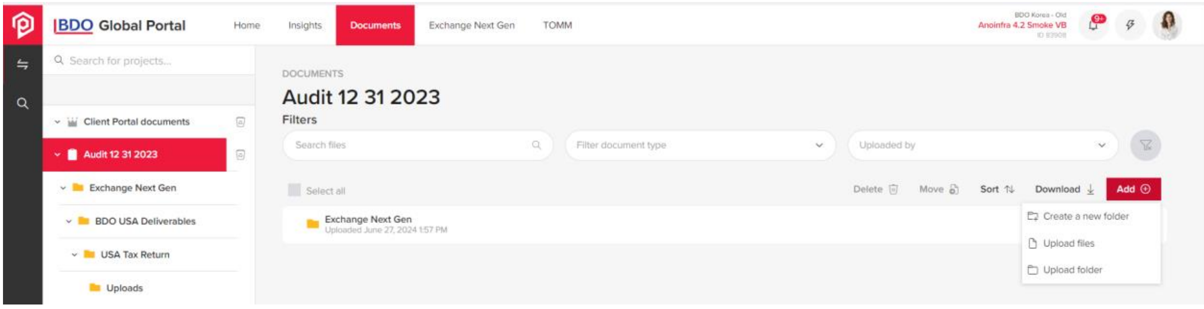
2 Project level folder (pad icon)

3 Subfolders under a project

4 File area where you can drag and drop new files or folders.

## 4.2 Upload a document

If upload is allowed, the red **Add** button appears in the top right corner of the file area. Select an option from the **Add** button menu or drag and drop documents in the file area.




You can upload single or multiple documents and folders. Only one document with the same name can exist in a folder. A document which is being uploaded cannot be selected, edited, renamed or deleted. The options to perform document action appear only after the upload is complete.

### 4.2.1 File upload limits

- 30 files are the total amount of files which can be uploaded via File Select or Drag & Drop function at once.
- 2GB is total size of files which can be uploaded at once.
- 2GB is maximum allowed size of a single file for upload.

It is not recommended to upload more than 5000 files or folders into a single folder.
Currently supported file types:
.pdf,.jpg,.png,.gif,.zip,.rar,.txt,.doc,.xls,.ppt,.docx,.xlsx,.pptx,.gme,.eml,.msg,.vsd,.vsdx,.html,.xsl,.xml,.preview,.xslt,.jpeg,.xlsm,.htm,.docm,.xps, .mp4,.7z,.log,.xlm,.pptm,.zipx,.csv, .qbw, .qgw, .qba, .qbb, .qbm, .qbx, .sdb, .sdw, .sai, .saj, .abk, .aga, .agacc, .agaccbackup, .agacctransfer, .agex, .agexbackup, .agextransfer, .qdf, .sie, .se
While uploading a document, you can continue working with other files.

### 4.2.2 Characters support in file names

- English alphabet is supported
- Norwegian alphabet is supported
- Hebrew alphabet is supported
- File names cannot contain any of the special characters: " * : < > ? / \ ~ |. If the upload contains the characters, an error message is displayed and it is not possible to proceed.
- Each document name must be unique per the parent folder. A validation message is displayed if a duplicate named file is uploaded.
- A Document name must be between 1 and 100 characters.

## 4.3 Manage access to a document

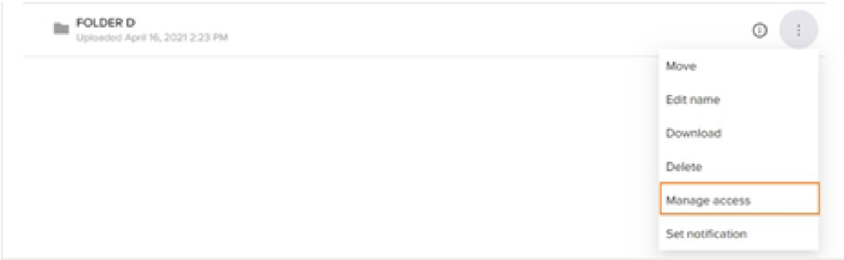
### 4.3.1 Read-only

Setting a document to **Read-only** mode means that all users can only view the file, without the ability to edit it. This ensures that the document remains unchanged and accessible for viewing by everyone.


### 4.3.2 Manage Access

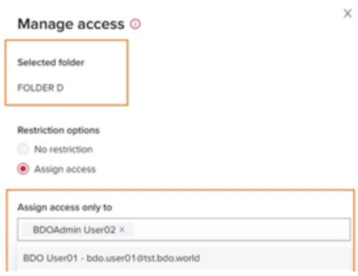
The access to a document or a folder can be restricted by managing its access to a select amount of people. Only the users with access can see, view, edit, receive notifications and remove the managed access. An Access restricted icon (lock) appears next to restricted files.

Two types of restricted files and folders can be applied: restricted access applied directly to the file/folder and access inherited from the folder or folders this file/folder is located in.

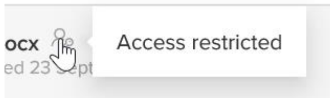



Click the **Manage access** button to open a new modal window to set accesses. Two toggles appear:

- No restrictions: removing access restriction, any user who has access to the Portal/Project can see/edit the files.
- Assign access: assigning access restrictions, and any users who have access to the Portal/Project can be set to receive managed access to the folder.




The user who is managing the restricted accesses for the folder, cannot remove themselves from the list. When a folder gets its access restricted, it is marked with a lock icon.



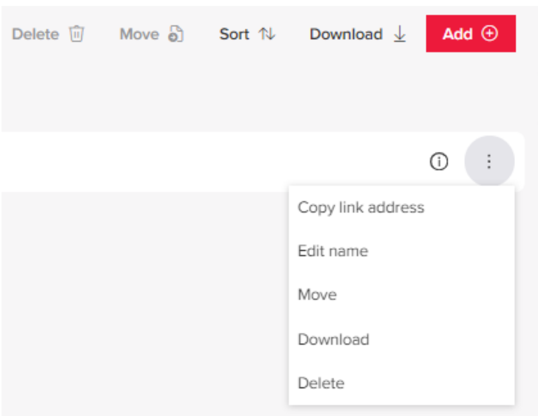

Any files and folders inside this restricted folder inherit the parents' restrictions and can only be reached by the user with explicit access. Unlike the folders with restricted access, the inherited access folder and files do not display a restricted access icon.

## 4.4 Edit a document

Documents that were uploaded directly to the **Documents** library, can be edited if this is allowed in your project settings. If you can open the documents in your browser via the online M365 apps, you can edit, and your changes are automatically saved.

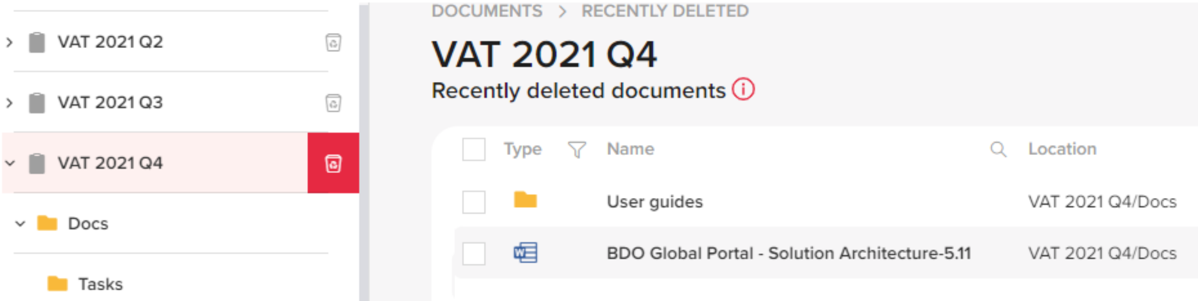
If viewing files online is not supported, an option to download the file appears.

Manage documents and properties via the options next to the **Add** button or under the **Ellipsis** button .



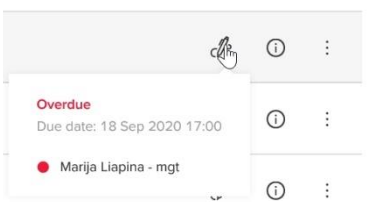
### 4.4.1 Delete files and folders

Files and folders can be deleted, if they are not read-only. Deleted files and folders are moved to the recycle bin where they stay for 90 days. Files and Folders can be restored to the original directory or permanently deleted.

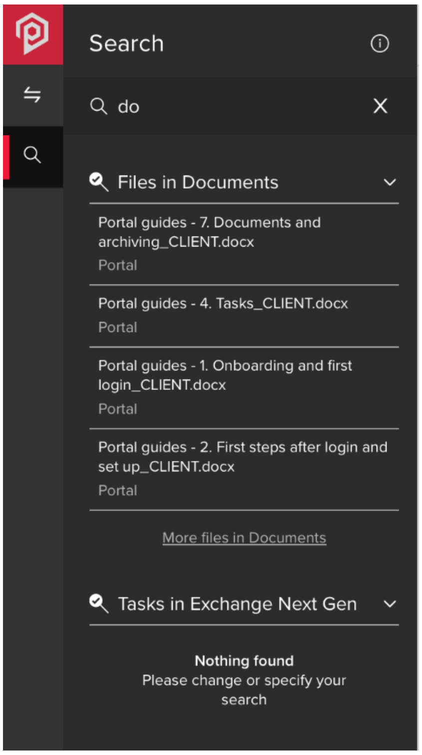



## 4.5 Documents & Tasks

If a document in the list is linked to an open task, such as a Signature or Approval request, you'll see a task icon next to it. To view the task details, hover over the icon. Clicking the icon will take you to the task on the **Exchange Next Gen** page, where you can complete it if it's assigned to you. Documents associated with completed tasks will display a green bar next to them, indicating their completion status.




## 4.6 Search documents

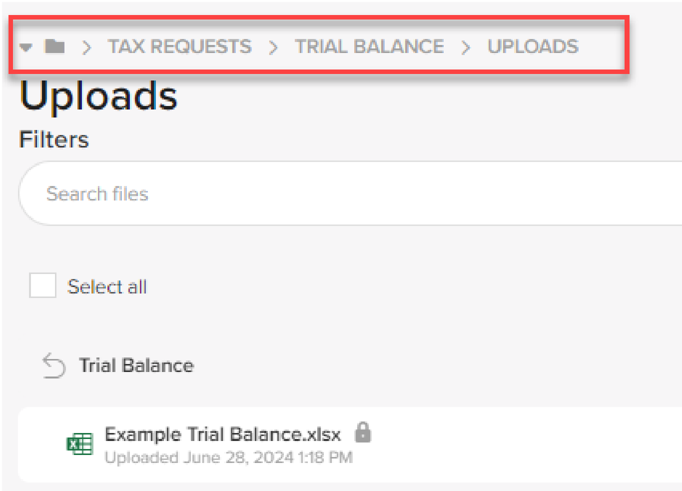



You can search for specific files from any location on Global Portal. Insert the search term next to the Search icon. Folder names do not appear in search results.

***NOTE:*** *New Files and Tasks need to be indexed by the system after each change. This may take between a few minutes and 24 hours.*

## 4.7 Breadcrumbs (file paths)

A breadcrumb is a graphical control element used as a navigational aid in user interfaces. It allows users to keep track and maintain awareness of their location in the directory.



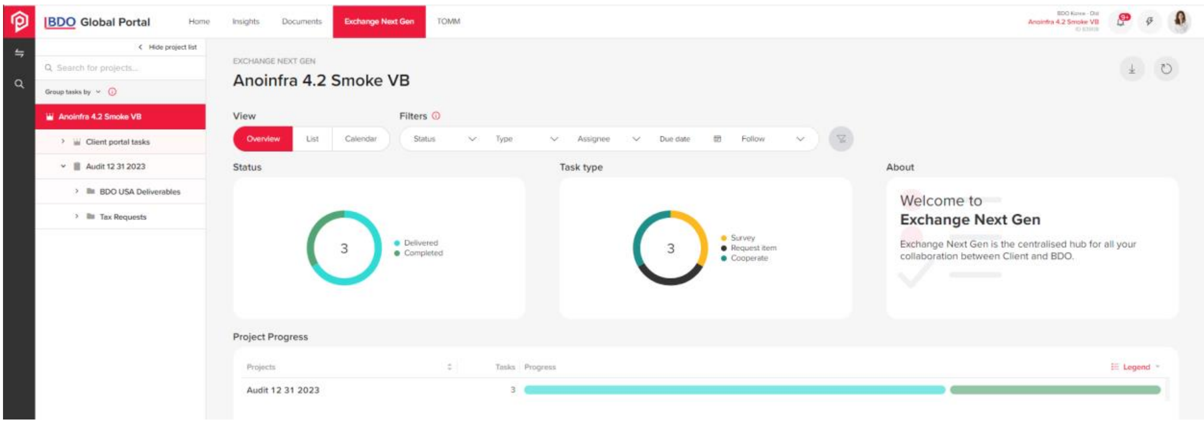

Only the last three folders are displayed (closest to the current directory). The rest are in a list under the drop-down.

# 5. TASKS AND EXCHANGE NEXT GEN

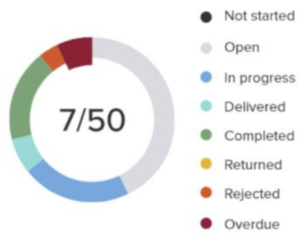
Click the **Exchange Next Gen** option on the main navigation menu to manage and deliver tasks in your portal.

The **Exchange Next Gen** app provides a secure site to upload your documents combined with interactive dashboards to monitor any deliverables you and your team still need to provide.

You can view dashboards to see which tasks are overdue or outstanding. Each project has a view allowing you to monitor tasks and document requests by type, including filters by due date or assigned to.




## 5.1 Status dashboard

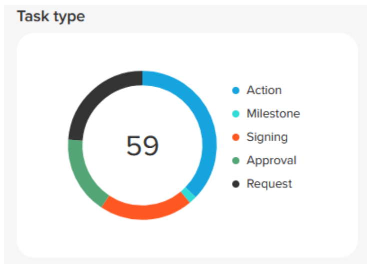



This dashboard has two elements – a "doughnut" diagram and a list of statuses.

The size of each piece represents the proportion of each status by tasks count.

To the right of the doughnut you can see the list of available statuses. Select each status name to filter the tasks in the **Task type** dashboard.

## 5.2 Task type dashboard



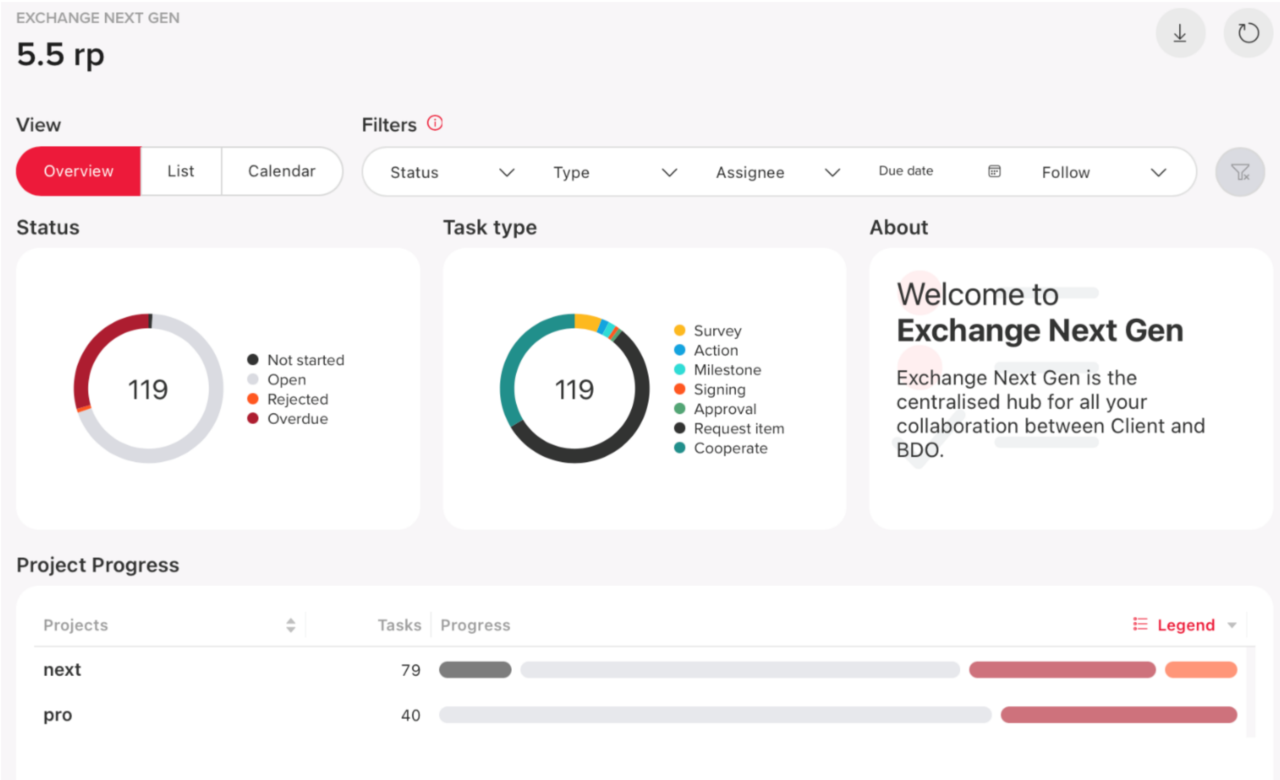

It works in the same way as the **Status** dashboard. Exceptions are listed below:

1. List of task types with the final order and colours:
2. Hovering on a piece shows the name of type in a tool tip
3. The right side is filled with names of the task types

Dashboards are interactive to each other in reverse order as well.

## 5.3 Project progress dashboard

This dashboard is linked with "Status" dashboard directly, showing statistics on a Project level and has 3 columns: "Projects", "Tasks" and "Progress".




In the **Projects** column you can see all Projects to which you are added to and will be listed out under “Client portal tasks”. If a project does not have tasks, it will not appear in the **Projects** column.

Numbers in the **Tasks** column show total (one number) or selected count of tasks (2 numbers divided with "/") in the same logic as per numbers inside status doughnut.

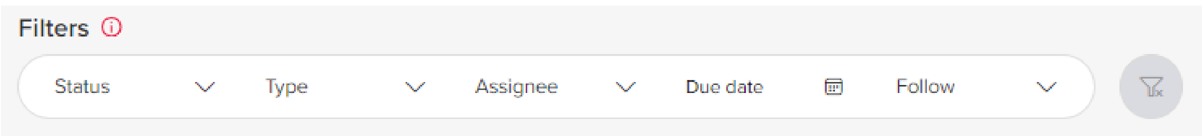
The **Progress** column displays a pills chart. The Pill is not shown, if there are zero tasks in the particular status and the Project line is not shown if no tasks in the project or no tasks left to show after filters applied.

It is possible to use pills dashboard grouping functionality by Meta data for Project/Client portal tasks level by choosing either a project or Client portal tasks, opening Overview view and hovering above the pills dashboard. The default grouping by "Task group" is displayed. According to the chosen grouping option, table title & first column will be the same as chosen grouping option.

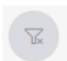
- on the left side of the pills are showing count of total tasks within selected type
- hovering shows only that type of status statistics

5. Sorting is not affected
6. User can sort filtered results

## 5.4 Dashboard Filters




Select a status by clicking on the **Filters** area. Choose the needed status by clicking on it. Multiple selection is available.

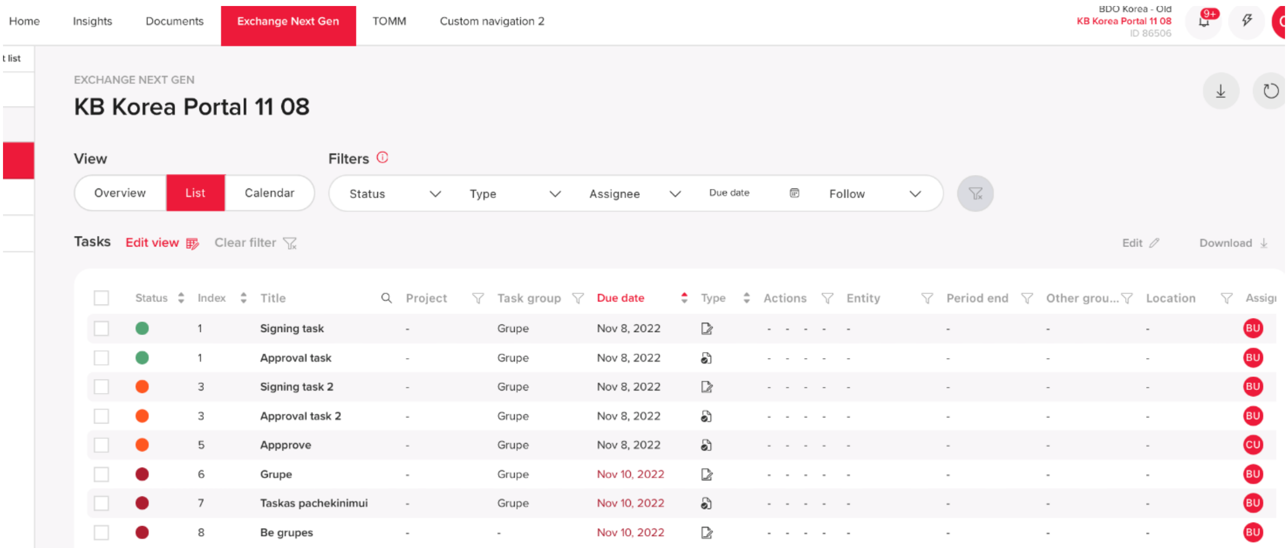
The Clear button  resets all selected statuses. The button is greyed out if no filters are applied.

Please note that the filters are kept while changing dashboards between projects, portal level and Client Portal tasks.

*Note: After filtering data by any master filter described above, the master filters are kept while changing the dashboards' view (to Overview, List or Calendar).*

## 5.5 List view

Click the **List** button to display Tasks in a table.

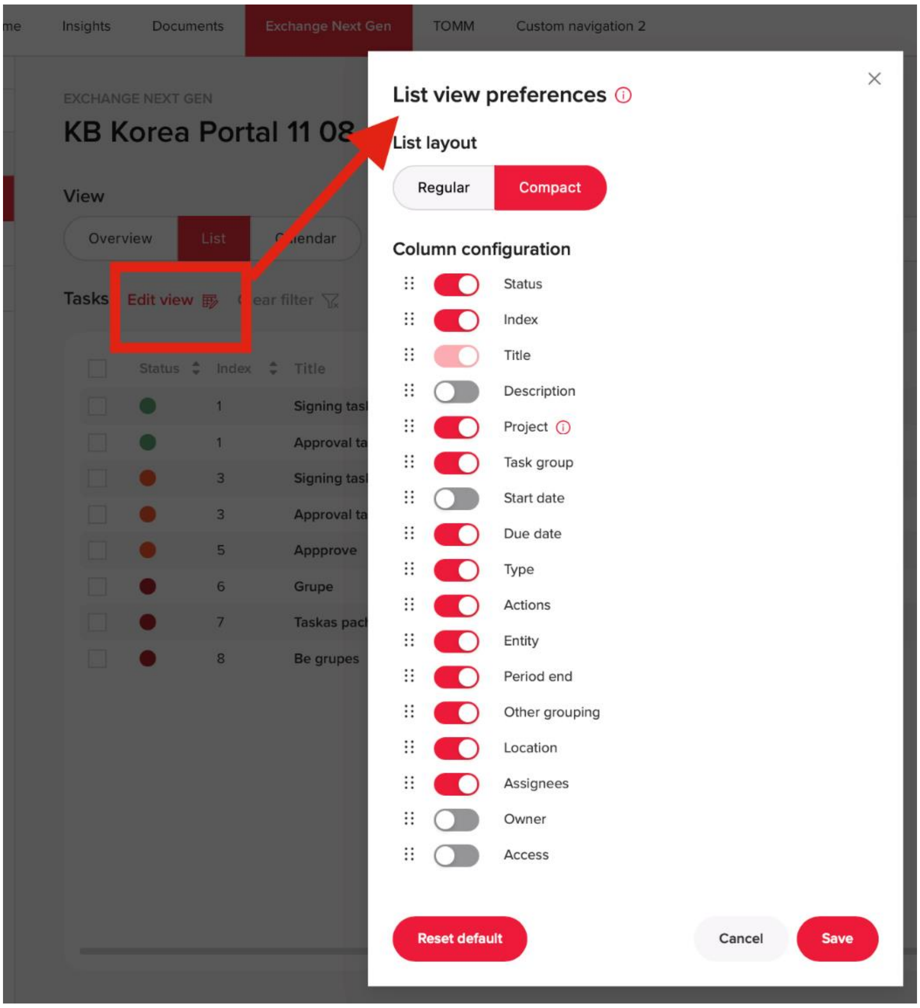



The columns within the table are:

- Status – status of the task displayed as a bubble with a status colour and status name
- Index
- Title – title of the task
- Due date – due date or extended due date (if the is one) value
- Project – project name to which task is assigned to
- Task group – task group to which task belongs to (if a task does not belong to a task group, the "-" symbol is displayed)
- Task type (Request; Action; Approval; Signing; Milestone)
- Actions if a task is:
    a) Restricted/unrestricted: restricted tasks are displayed with the eye icon
    b) Flagged/Not flagged: flagged tasks are displayed with the flag icon
    c) Exported/Not exported: exported tasks are displayed with arrow icon.

By default, all tasks in the table are sorted by Due date from older to newer.

Click the Edit view button to change the appearance of the table. 

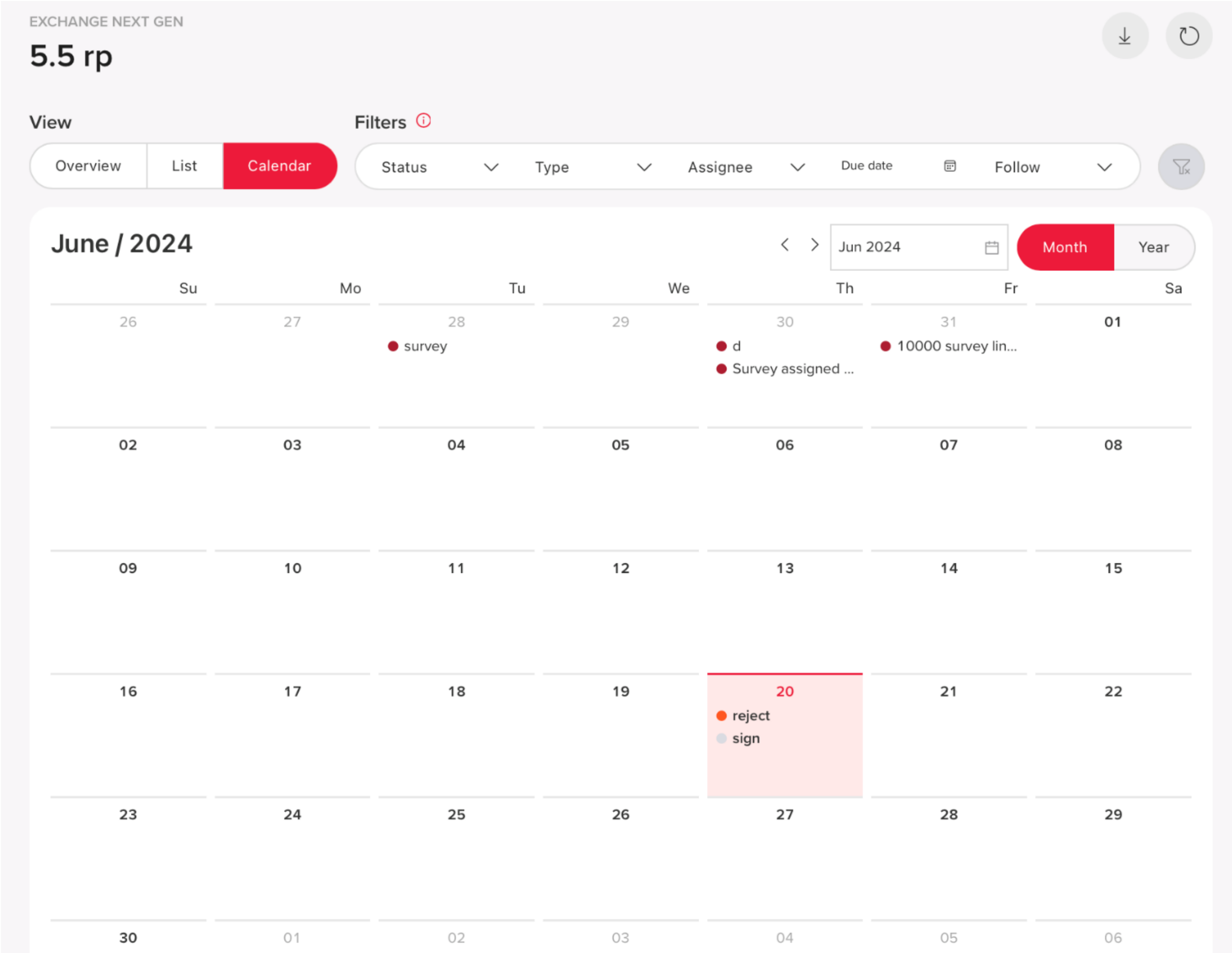



Change the order of the columns by dragging each column title up or down and click **Save**.

You can always switch the view back to **Regular** by using the toggle or clicking on the **Reset default** button.

## 5.6 Calendar view

If you choose the **Calendar View**, a default monthly view appears. Switch from monthly to annual view by using the radio button on the top left corner.




**Note:** The Calendar view depends on the date filter applied, i.e. if the filtered period is within a single month, the month is shown. If the filtered period is between a few months in the same year, the year is shown, which includes the filtered period. If the filtered period includes 2 or more years, the first year of the period is shown.

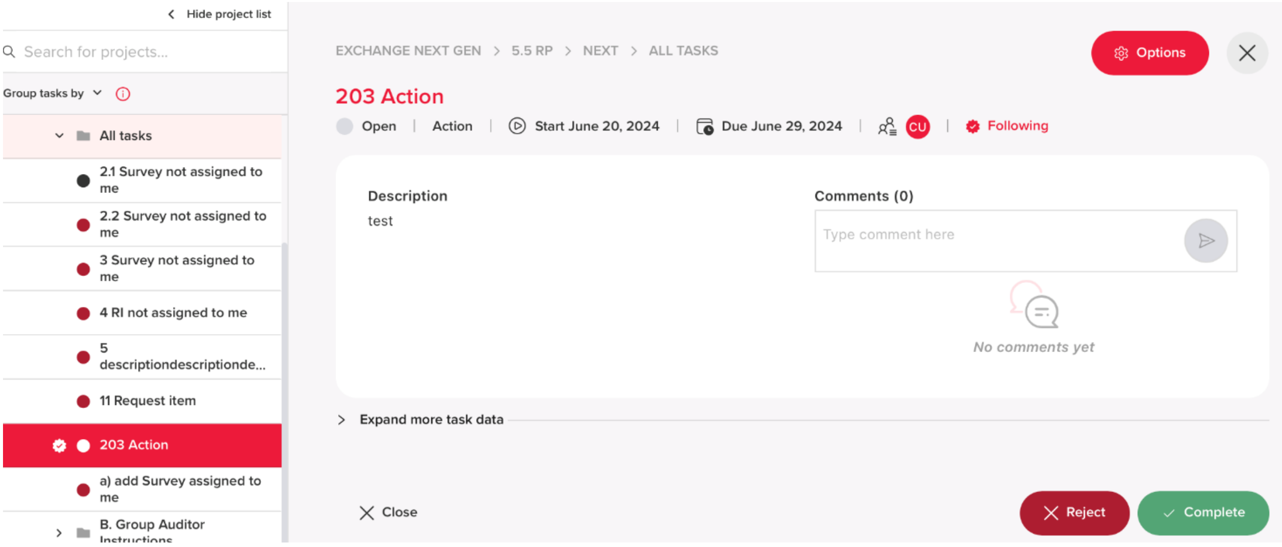
If a task does not have a due date, it is not displayed in the Calendar view. In cases where multiple tasks fall on the same day or month, a full task list can be accessed using a scrollbar.

# 6. TASK TYPES

There are the following types of Tasks:

- Request Items
- Actions/Milestones
- Survey
- Cooperate
- Signing
- Approval

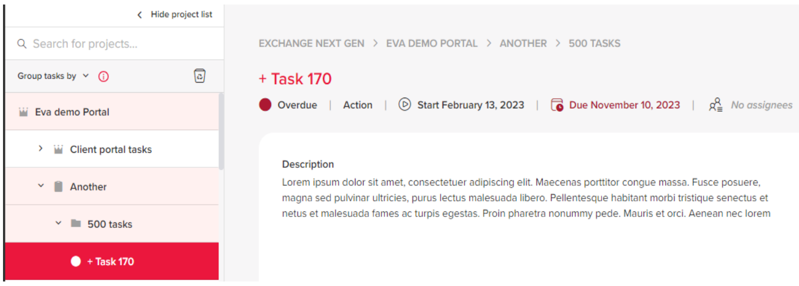
When tasks are grouped by projects, which is the default setting, they are sorted in ascending order by index. Tasks that have an index appear at the top of the list, while tasks without an index are placed below the indexed tasks for easy reference. This sorting method ensures a structured and organized view of tasks.




The colors next each task’s name have the following meanings:

- Grey - No action done by user
- Blue/Green - Delivered
- Orange - Rejected
- Green – Completed
- Red - Overdue

Tasks can be organized in Task groups. These appear as folders under each project. When a task is selected, the task group name is displayed in breadcrumbs.




# 7. TASK ACTIONS

## 7.1 Provide an attachment to a Request Item

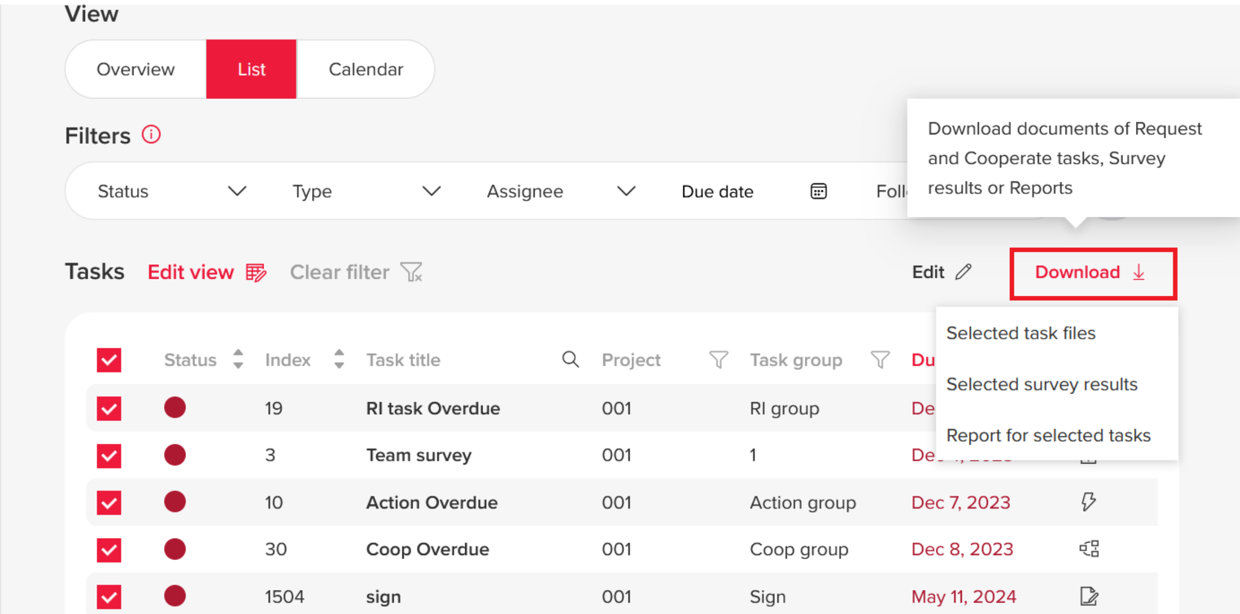
You can upload files or folders to the Request Items task. Rules for adding folder/folders with files to the Uploads section are:

1. Only one-level folders can be added;
2. If a nested folder is added, the system displays a warning: "The uploaded folder contains sub folder(s), this is not permitted. A folder only containing files can be uploaded here."
3. Files cannot be added to the already uploaded folder;
4. Folders and files are displayed in a file tree.
5. Allowed file extensions depend on each Tenant setting. Reach out to your BDO contact if you need to upload a file that has a different extension than the ones listed in **4.2.1File upload limits**
6. File size restriction applies the same as files in Documents (2GB).
7. If more than 8 files are uploaded, a scroll bar appears.
8. All files can be downloaded at once on **Download all** button. Files are zipped.

When a BDO or a Client user adds at least 1 file or comment, the task status changes from *Open/Not started* to *In progress*. Change of status activates the action buttons at the bottom of the Overview page: and the **Deliver request** button is visible as active.

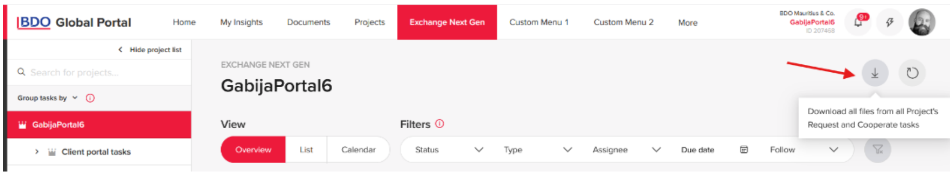
## 7.2 Download Request Item files

You can download files from ONE project's /Portal Request task. Only Request task documents can be downloaded. The **Download** button is displayed at the right top of the list view and is active, if the Project has at least one Request task.




Download starts in the same tab and navigation to other places will not cancel the download process. Files are downloaded in a zipped folder following the structure like in Documents page.

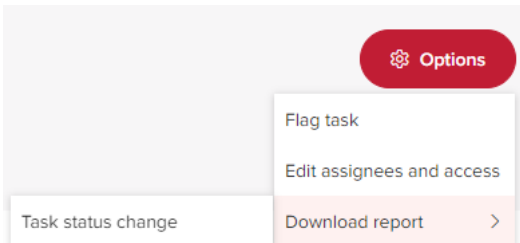
Users can also download all Request and Cooperate task documents on Portal level:




## 7.3 Actionspl

You can perform the following actions with all tasks:

- Flag a task
- Edit assignees and access
- Download the Task status change report




### 7.3.1 Flag a task

You can flag or unflag all types of tasks (Action, Milestone, Request, Signing, Approval) on both Portal level, and Project level. Once you flags/unflags the task, this change will be done on a task level, and same marking will be displayed for all other users.

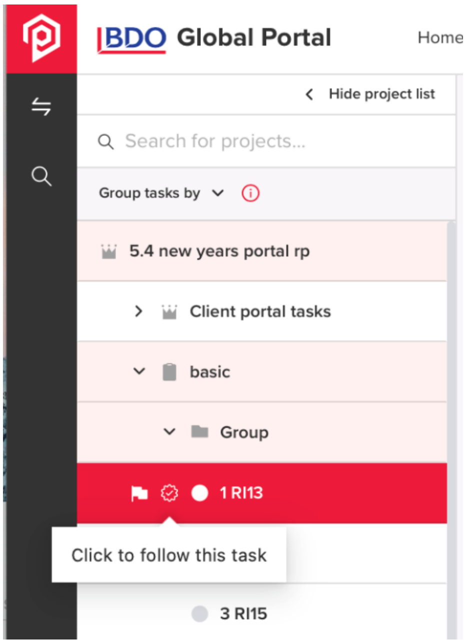
**Group Tasks by flag**:

1. Flagged option should be available in Group Tasks by dropdown;
2. If you select Flagged option, menu will show 2 folders with flagged and unflagged tasks:
    a. flagged folder shows task list of flagged tasks listed by due date, with earliest due date on top.
    b. not flagged folder shows tasks list of not flagged tasks listed by due date, with earliest due date on top
    c. if there are no flagged tasks, folder is not displayed;
    d. folders will be displayed within project.

### 7.3.2 Follow a task

The task-following feature enables direct access to tasks that are relevant to you, eliminating the need to navigate through unrelated tasks.

In Exchange Next Gen, go to an assigned task or a task that you have access to. Follow a task by either using the Options function, task bar in the task window or under the project list's navigation by clicking the tick icon next to the flag icon.

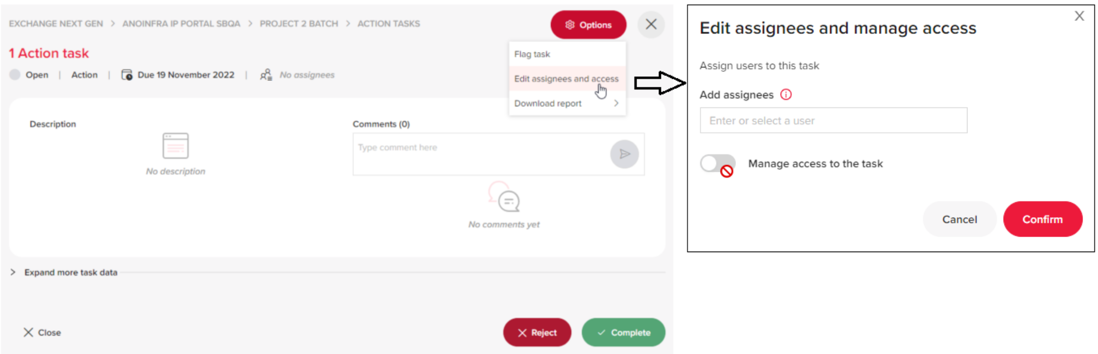



### 7.3.3 Edit assignees and access

You can edit Client assignees and manage access for Request Item and Action tasks, that are not in *Completed* or *Rejected* status. Client user roles that can edit assignees and manage access are:

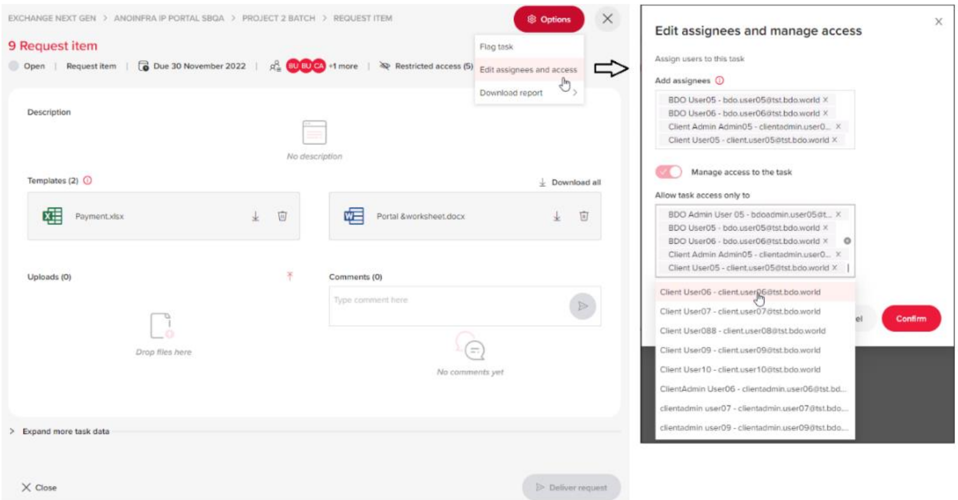
- Client Portal Admin
- Client Project Admin
- Client Project User

Select a project within Exchange Next Gen, open created Action task without assignees. In the overview page click Options -> Edit assignees and access. Pop up window „Edit assignees and manage access“ opens.



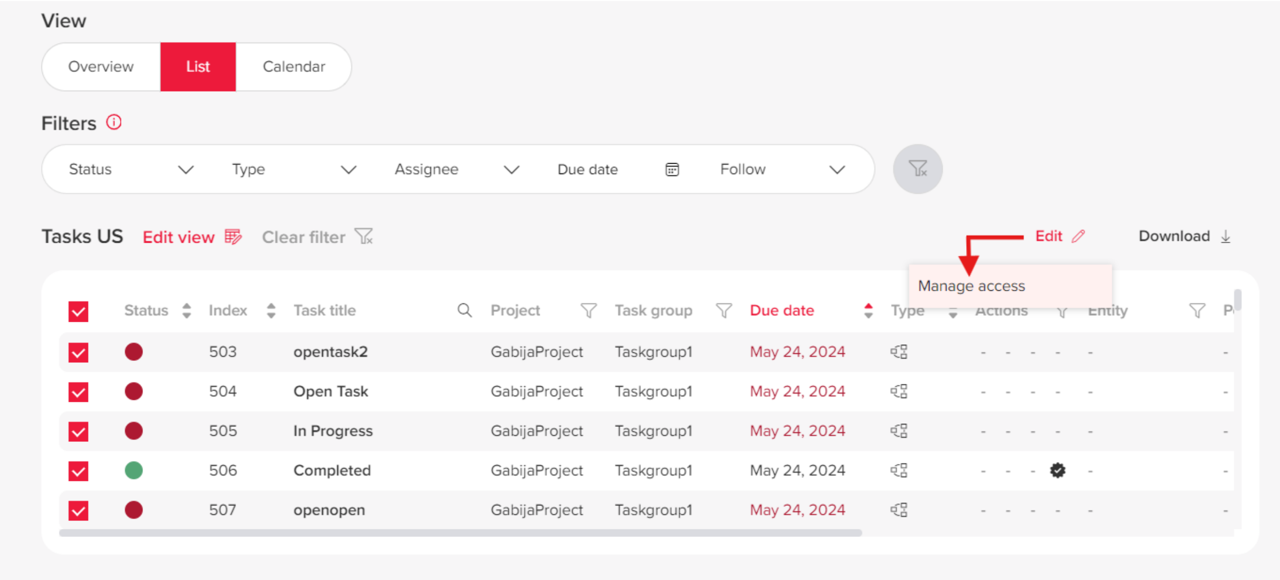

You can add/delete yourself and only Client-side users to the Assignees. Also, you can edit only Client-side assignees and manage access for restricted Action and Request item tasks that are not in *Completed* or *Rejected* status. Client admins do not have the ability to manage BDO users.

Assignees are added by default to the Manage access and can't be removed. If a Client User wants to remove Client-side users' access, they should make changes in Assignees fields beforehand.



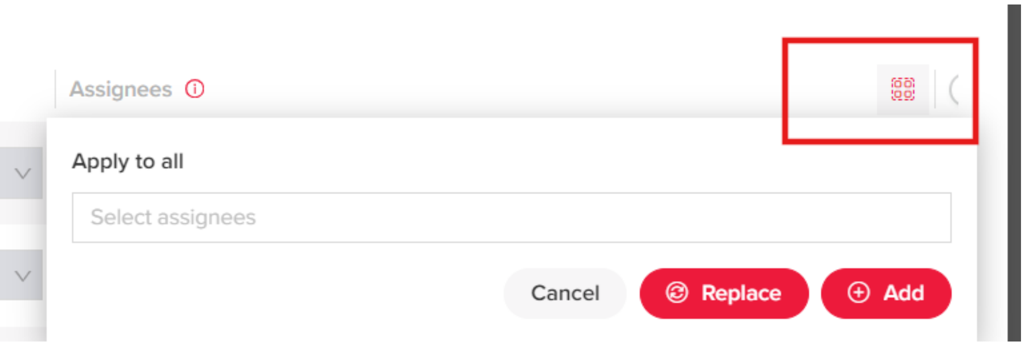

You can also manage access to multiple tasks in Exchange Next Gen Portal level:

1. In Exchange Next Gen, click on List view, select all the tasks from various projects and click on "Manage access"




You can also set access of all tasks in Exchange Next Gen Portal level

- In "Manage access", **Assignees column** click on red square icon "Apply for all' and verify only users, who have access to all Portal projects, are shown in the drop down list

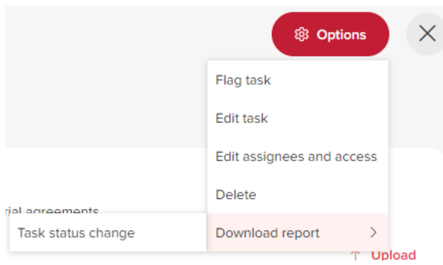



- Choose any client-side users from the list and click 'Set for all' button

### 7.3.4 Download Task status change report

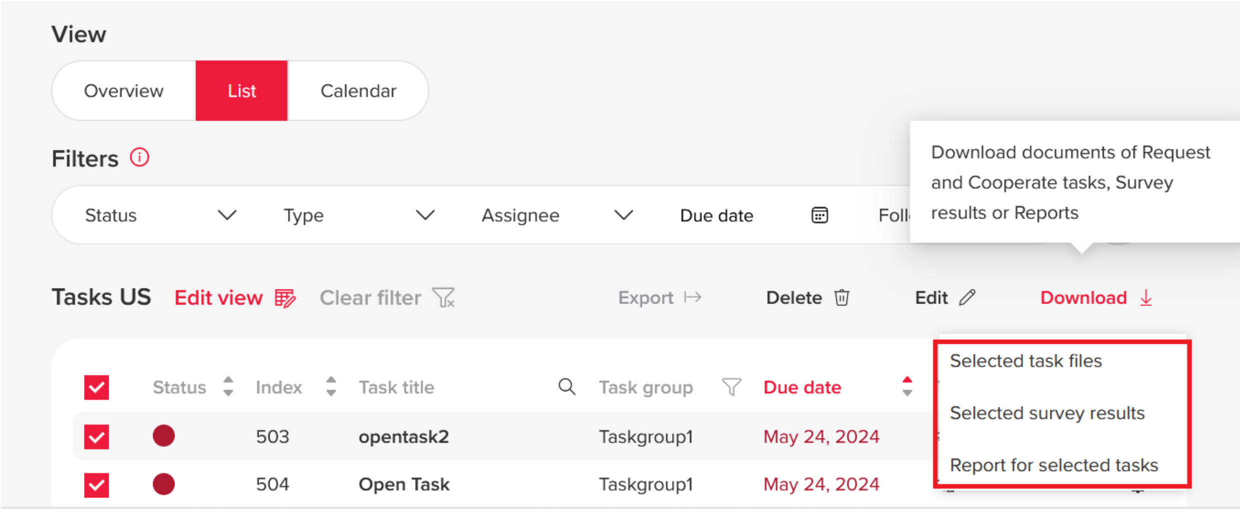
The **Task status change report** allows to track what and when happened with the task and who and when changed the task status.

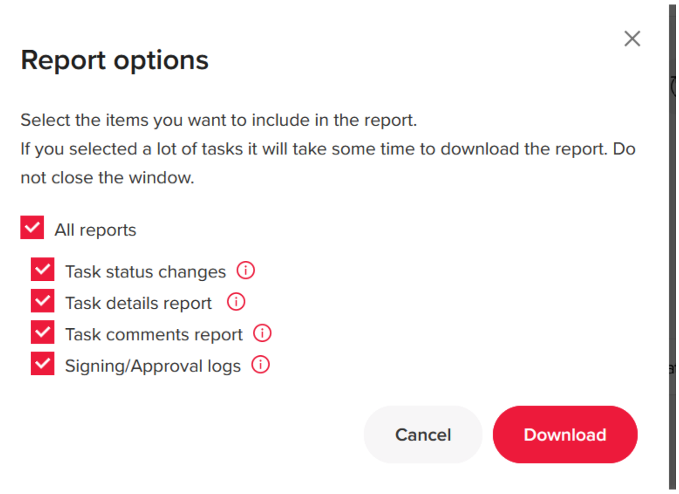
Any user that has access to the task is able to download the **Task status change** report via **Options** -> **Download report** -> **Task status change**.




The **Task status change report** is available for download as an Excel file containing all history logs for the particular task.

The project reports **Task status changes**, **Task details**, **Task comments and Signing/Approval logs** are available for both BDO users and Client users.



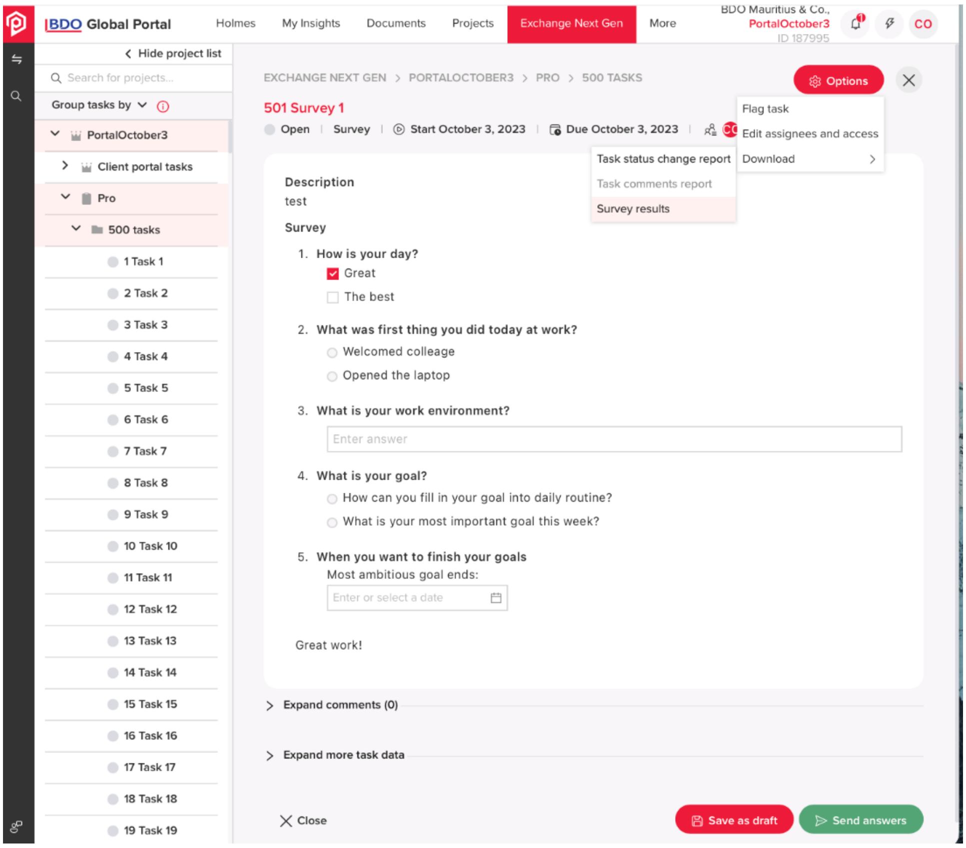




#### 7.3.4.1 Download survey results

All users can download an Excel file with Single Survey results and analyse the results. Results file content reflects the same information as it is in UI (Portal, project, status, subtype, index, title, task owner, group, description, assignees, manage access, start date, due date, extended due date, location, entity, other grouping, period end and all the questions, section breaks and answers if there are any)

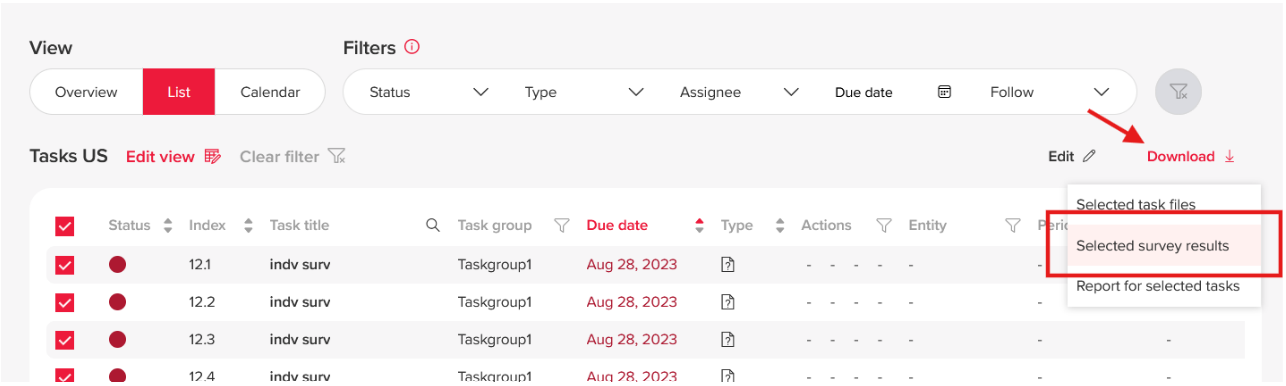
**Note:** Mandatory questions are marked with asterisk. If the answer is not provided, the field under the question is empty.

- All questions have number, section breaks don't. If more than 1 answer for multiple choice or date question are selected or if the answer with explanation is selected, answers are separated by "|".
- The structure of file name is "Survey task_[Task title]_[date and time when it was generated]. Date format depends on MF language settings.




### 7.3.4.2 Download selected survey results

Any user (both BDO and Client, including Readers) in Exchange Next Gen can download Survey results from all Portal projects:




## 7.4 Answer a Survey task with branching

- If branching is added to any choice question in the survey, then assignee or any Client admin/user is provided with as many questions as there are until first branching starts.
- If the question is mandatory but it is skipped because of branching, user can send answers or save survey as draft.

## 7.5 Related Team Survey tasks

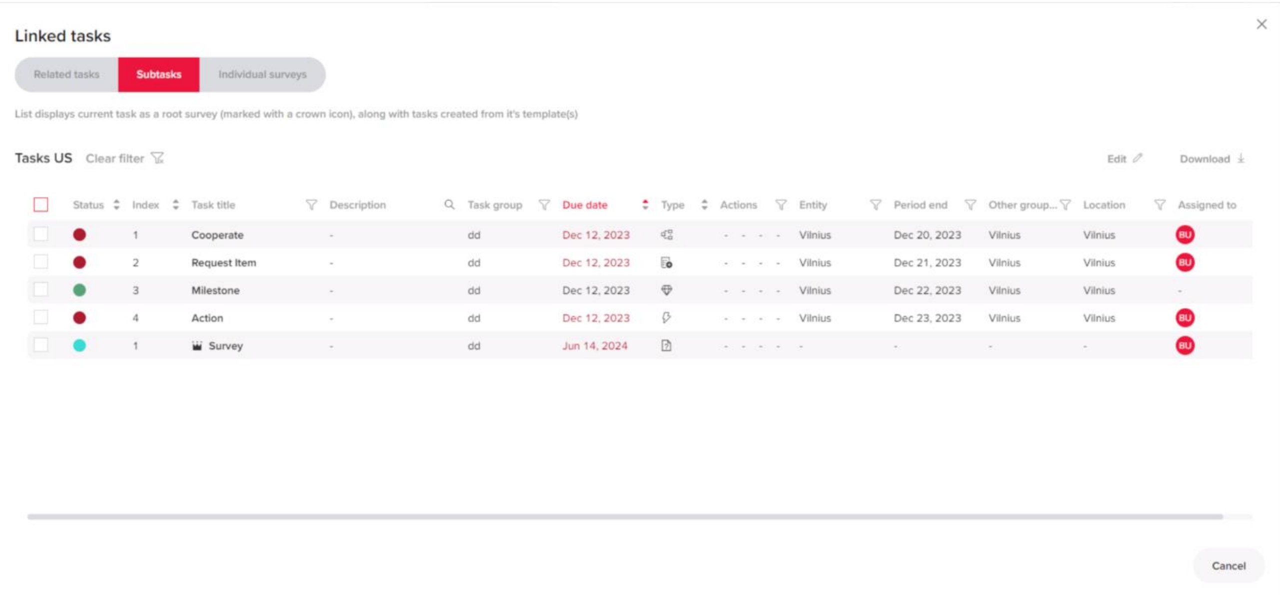
When Team Survey is delivered and tasks from linked template are created, users can overview all the related tasks: individual surveys, siblings and children tasks in the same modal but different tabs, so that they can understand relations.

Users can overview 3 sets of tasks:

- **Related tasks** tab in the modal is opened when the link "Set of tasks" is clicked from any task that was created from linked template of delivered Team Survey.
- **Subtasks** tab in the modal is opened when the link "Set of tasks" is clicked from initial (root) Team Survey overview page.
- **Individual surveys** tab in the modal is opened when the link "Set of tasks" is clicked from any Individual survey overview page, if more than 1 assignee is added during task creation.

**Note:** The same task can be displayed in 2 lists, e.g. Related tasks and Individual surveys or Related tasks and Subtasks.

If only one task is left from the set and other tasks are deleted, the link "Set of tasks" is not displayed.



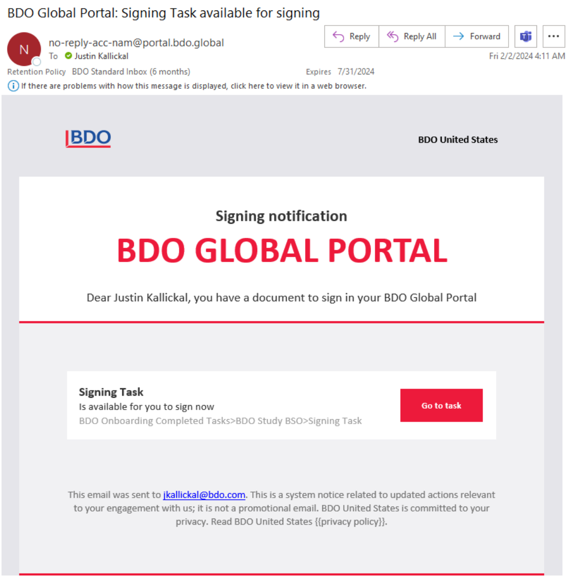

Client admin/user can manage access and download files, survey results and reports; Client reader can download files, survey results and reports).

# 8. DOCUMENTS ACTIONS

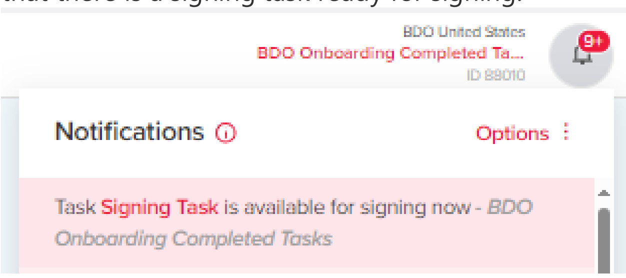
## 8.1 Signing and Approval tasks

When a BDO user needs to request a signature, they will add you as an assignee to a signing task in Global Portal. Signing tasks have integration with DocuSign while Approval tasks have similar functionality for approving documents without DocuSign integration.

As an assignee you will start following the task and will get notifications based on your notification preference (status changes, comments, etc.). If you are the first assignee of the task, you will receive an email notification indicating that this task is open. When the signing order is set, additional assignees receive an email notification when it is their turn to sign the document. They can simply click on **Go to task** in the email, which will redirect them to the task in Global Portal.

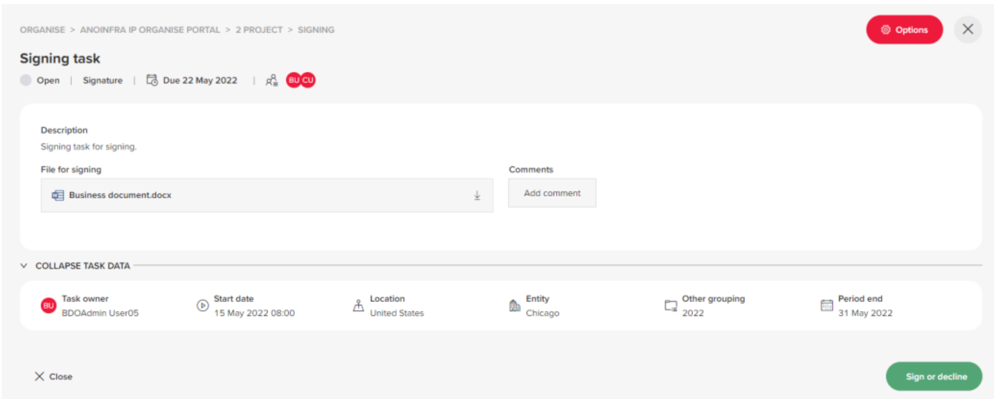


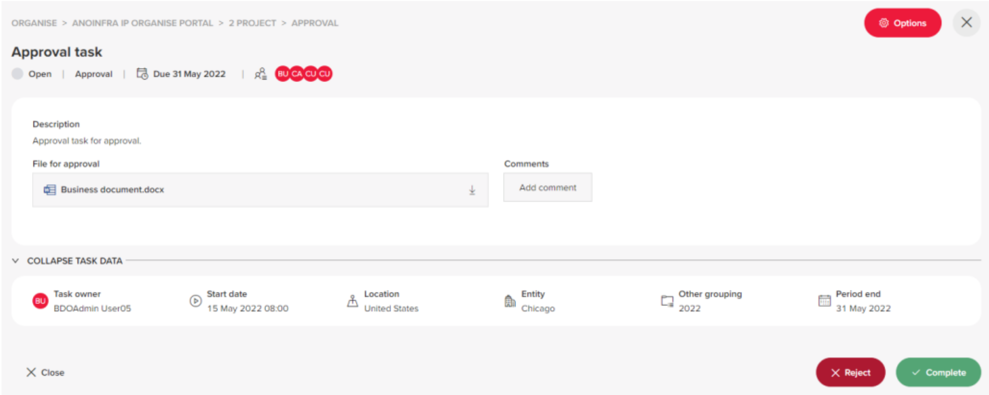

In addition to the email notification, you will also get a bell icon notification on Global Portal indicating that there is a signing task ready for signing.



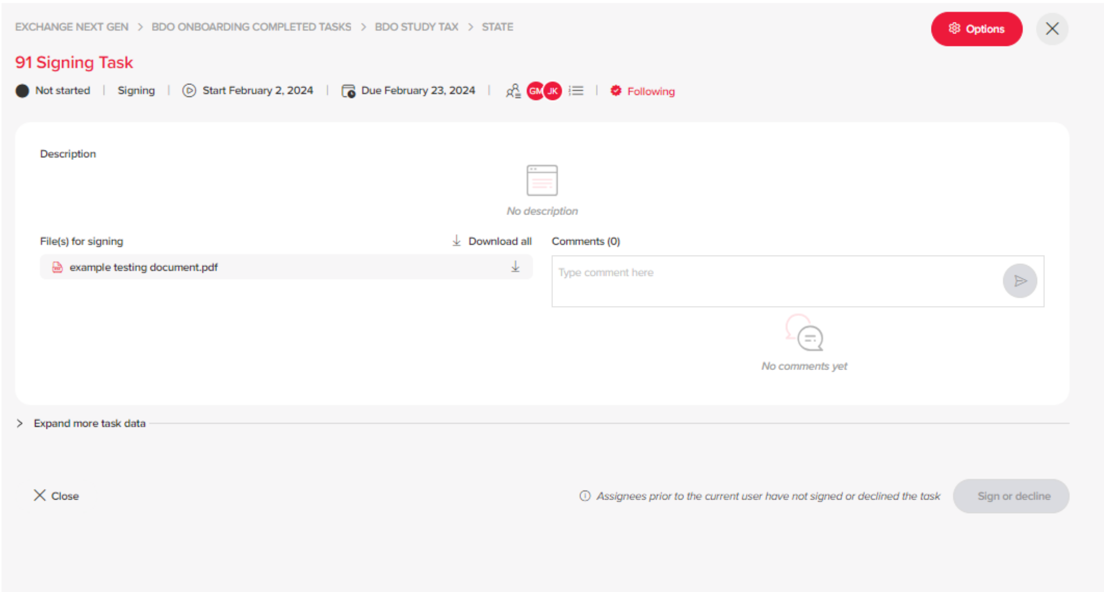

When you go to the task, you will see the task overview page that gives you additional information on the signing task. You can hover over the people icon to see the ordered list. The Green Icon next to the name indicates, that assignees already signed the documents. You have the option to download the PDF file so you can review the document before signing the document in DocuSign.

To provide a signature or approval go to Exchange Next Gen, choose the project and open the Signing/Approval task you are assigned to. Review the documents and press the **Sign or Decline** button in a Signing task or the **Reject** and **Complete** buttons in an Approval task.

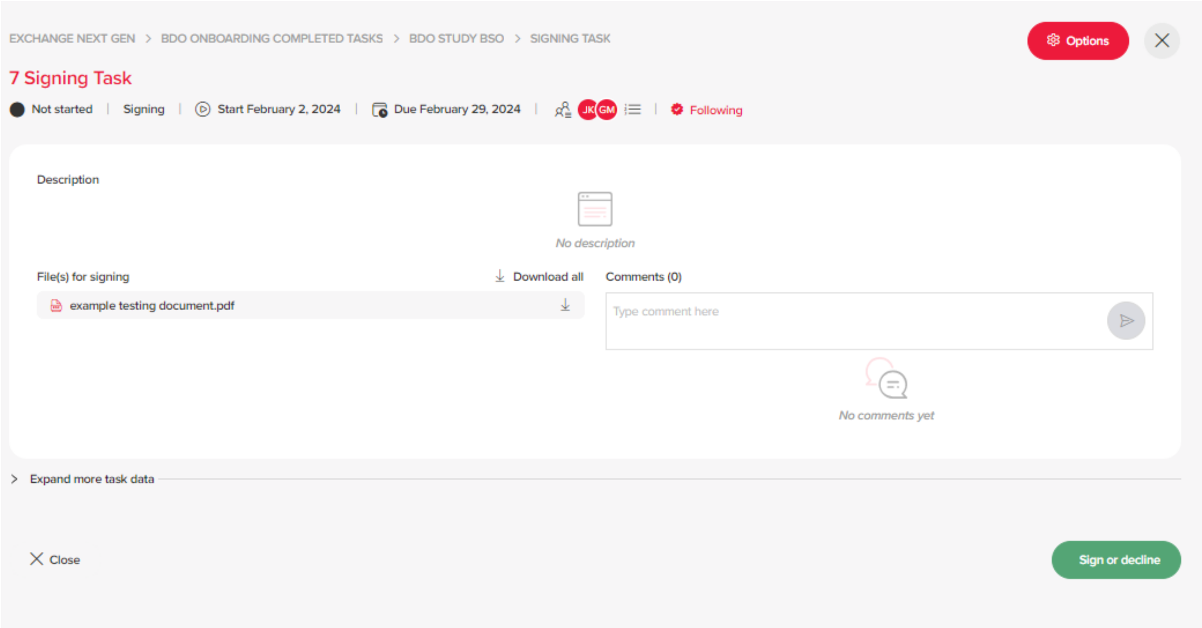




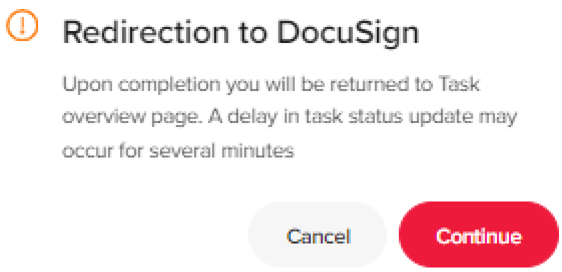

Please note that if you are on the ordered list and there are other assignees above you who have not yet signed the document, the **Sign or Decline** button will be greyed out with the message "Assignees prior to the current user have not signed or declined the task."



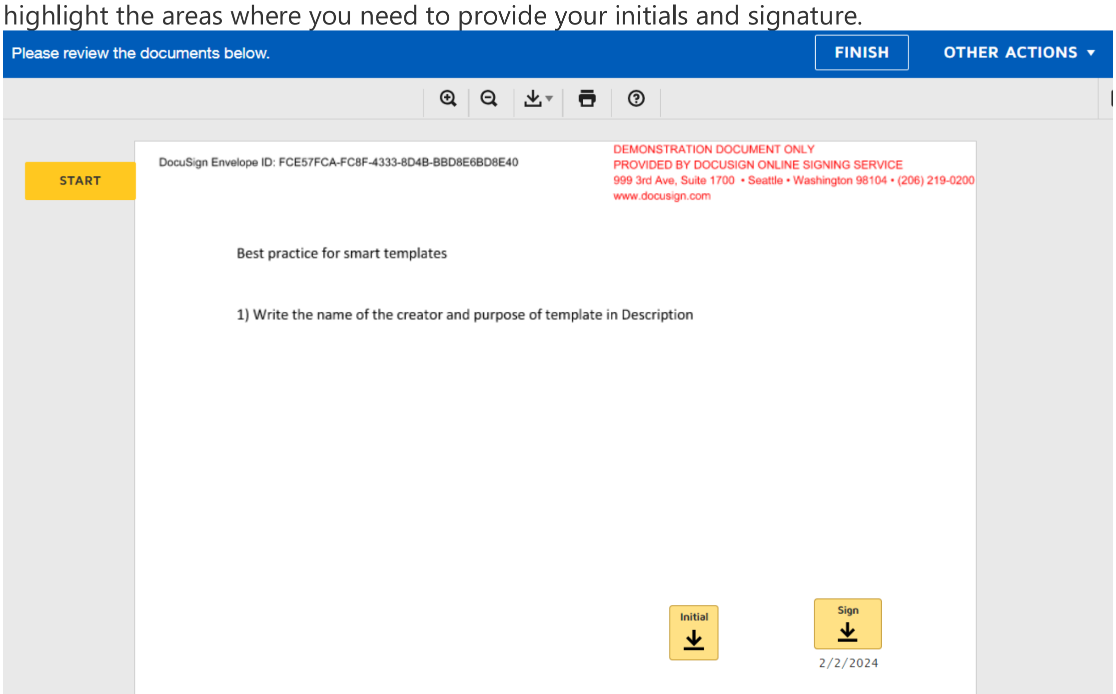

When it is your turn to sign the document, the **Sign or decline** button will become green.



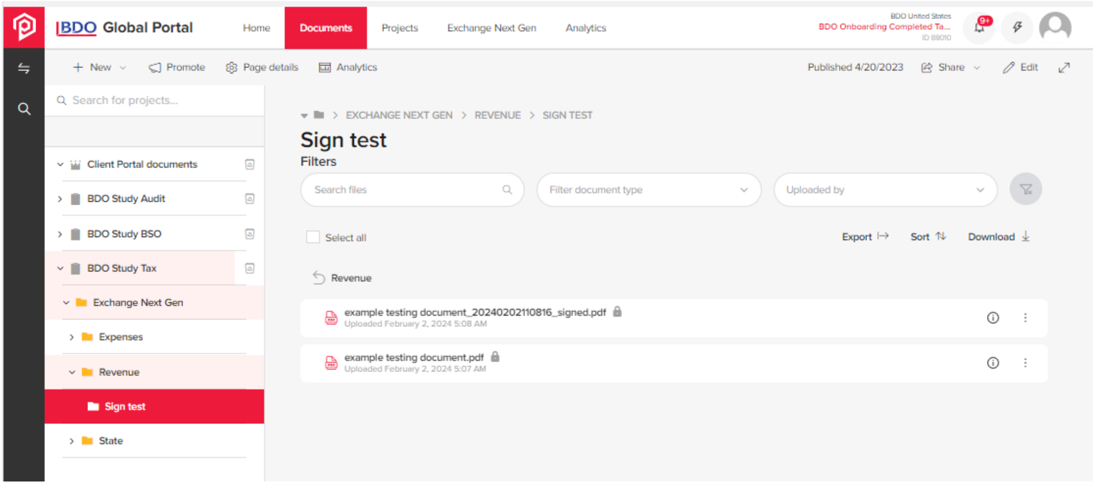

Clicking on the **Sign or decline** button will give you the below notification which indicates that you will be taken into the DocuSign platform so you can sign the document.




Once you are in the DocuSign platform, you have the option to click on **Start** and the system will highlight the areas where you need to provide your initials and signature.




Once everyone who is assigned signs the DocuSign document, the completed document can be found on the **Documents** page. This document cannot be edited.




## 8.2 Read-only/editable Request Item documents

Upload and Template files in Request task should be read-only or editable depending on a Request task status:

| ***TASK STATUS NAME*** | ***DOCUMENT ACTION*** |
|---|---|
| ***In progress*** | *All files in Uploads and Templates in this status are editable;*<br>*If files are deleted afterwards, Task status stays In progress and files are still editable.* |
| ***Delivered*** | *After Client user clicks on Deliver request button and task status becomes Delivered, then all files in Uploads and Templates become read-only both in Exchange Next Gen, and in Documents page.*<br>*If you add additional file to uploads, task status goes back to In progress. All files become editable, until user clicks on Deliver request button again, and make task status Delivered, with all files in read-only mode. (for testing of file adding part)* |
| ***Completed*** | *All files in Uploads and Templates become read-only both in Exchange Next Gen, and in Documents page.* |
| ***Returned*** | *All files in Uploads and Templates in Returned status are editable; Task is also editable.* |
| ***Overdue*** | *Files have same restrictions as in the status prior to Overdue.* |

You can add additional file(s) to the Uploads section, except when task is in status *Completed*.

All files in the Exchange Next Gen folder become read-only when task gets status Delivered or Completed and work the same way as with other read-only files in Documents. Files that have a lock icon next to the title are read-only. Read-only status depends on the status in the Exchange Next Gen task (when it is Complete or Delivered).

## 8.3 Storing Request Item files to Documents

All templates and files uploaded through Exchange Next Gen are saved in the **Documents** page under a particular project. Every Project has a folder named *Exchange Next Gen* by default and you can display Properties, sort, download and search the files.

You can't add additional files or folders from the **Documents** page to any of the Exchange Next Gen folders. Folder names cannot be edited from the **Documents** page. Exchange Next Gen structure folders (Exchange Next Gen, Task group name, Task name, Templates, Uploads) cannot be deleted from **Documents** page.

If a file name or a task name gets changed in Exchange Next Gen, it will be updated in **Documents** as well.

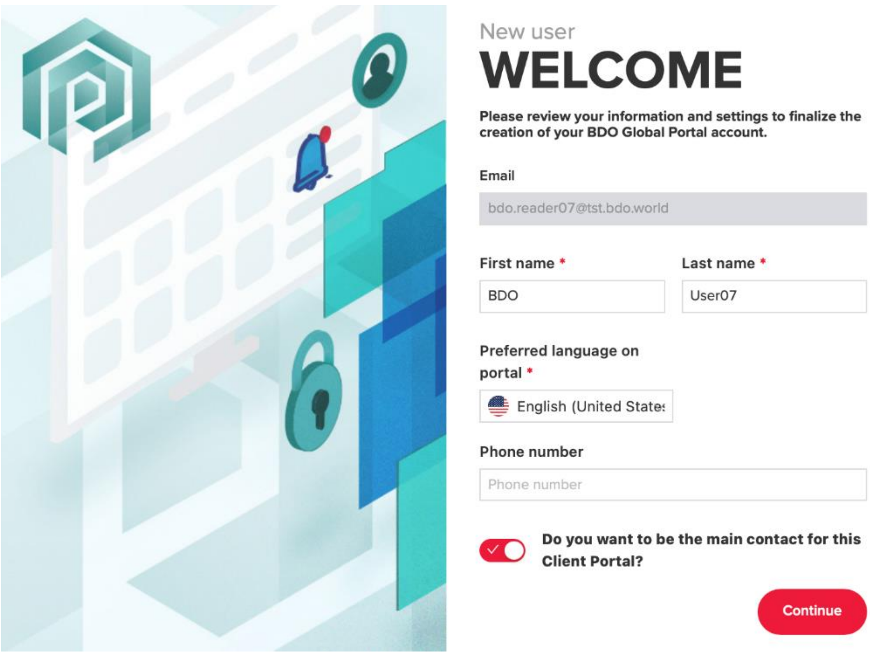
# 9. PERSONAL SETTINGS

When logging in Global Portal for the first time, you see a one-time consent dialog that requires you to consent to basic profile information (e.g., email address) being shared with BDO. After providing consent, you are redirected to Global Portal to continue with setup.

**Tip:** Leave the default selections on your first login. You can always edit these settings via the **Personal setting** menu, under the **Profile photo circle** icon.


## 9.1 Step 1 – Set my contacts

Please fill in your contact details and click **Continue**.

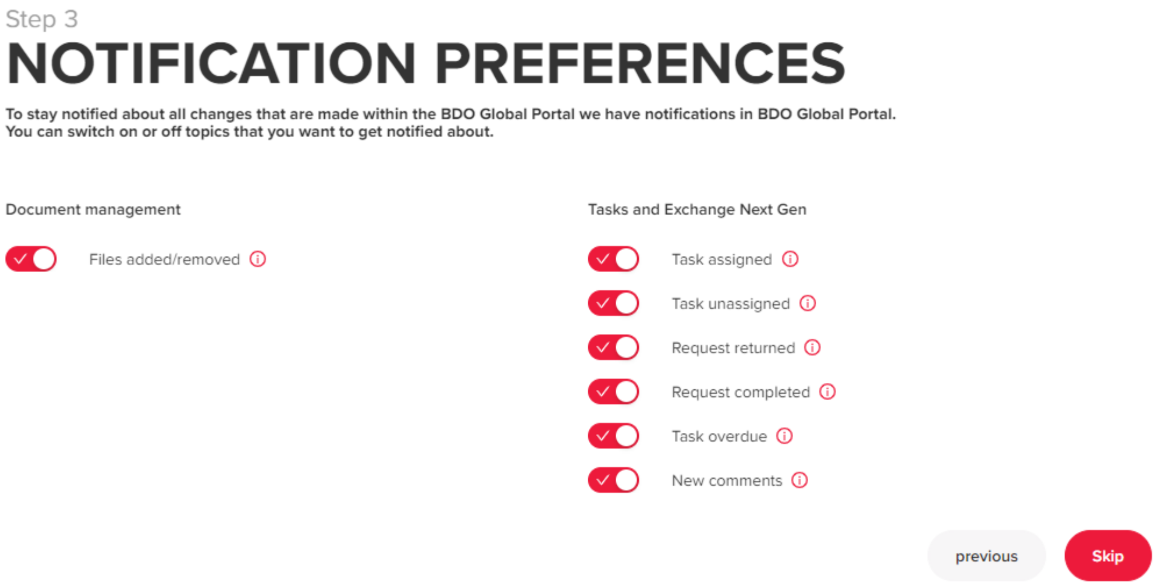


## 9.2 Step 2 – Set my Insight preferences


Set Insight Preferences on the second Welcome window. The default selection is for **All topics**. You can tailor the topics to your interests by toggling the options on the page.

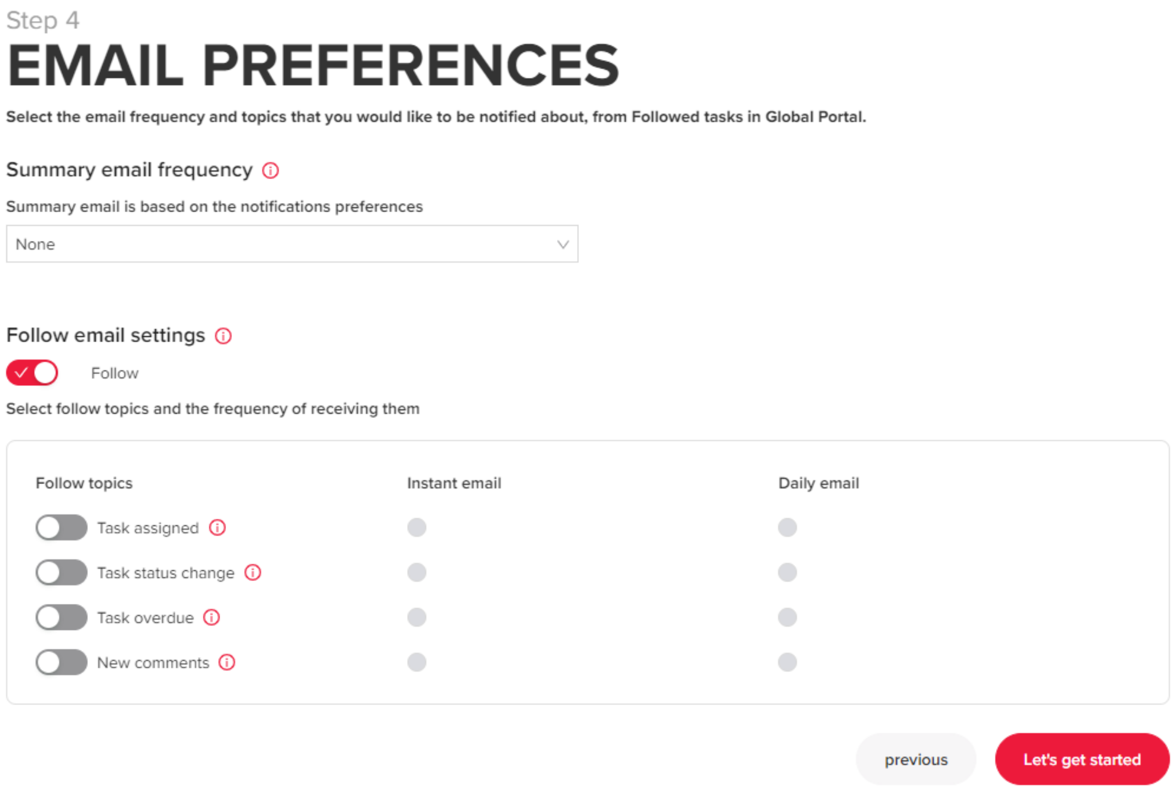
The **Insights preferences** step is not mandatory and you can skip it by clicking the **Skip** button on the bottom right corner.

## 9.3 Step 3 – Set my Notification preferences

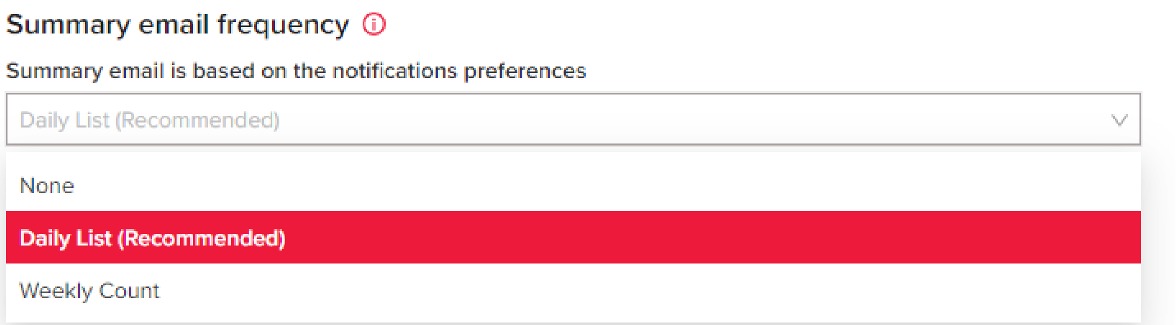



New users can set **Notification preferences** on their first login or later via the **Personal settings** menu under the **Profile photo circle** icon.

## 9.4 Step 4 – Set my Email preferences




Select the frequency of summary emails you receive from Global Portal. We recommend selecting the "Daily List" option to receive a list of all your notifications. This can help you track tasks and activities on your projects.




The **Follow** toggle enables you to receive email notifications (**Instant email**) for every status change on tasks you choose to follow. If you prefer to receive summary emails once daily, select the corresponding radio button under **Daily email**.

If you wish to edit your **Email preferences** later, open the **Personal settings** menu under the **Profile photo circle** icon.

# 10. TEAM MANAGEMENT FOR CLIENT ADMINISTRATORS

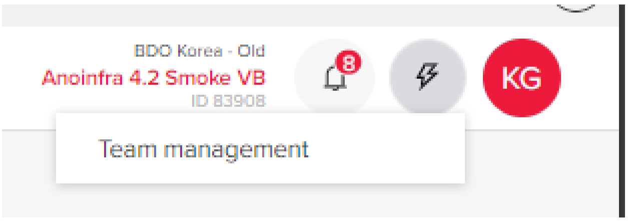
The roles Client users can have in Global Portal and their permissions are as follows:

| Role | Team management | Assign tasks | Level |
|---|---|---|---|
| **Client CP Admin** | ✓ | ✓ | Portal |
| **Client Project Admin** | ✓ | ✓ | Project |
| **Client Project User** | ✗ | ✓ | Project |
| **Client Project Reader** | ✗ | ✗ | Project |

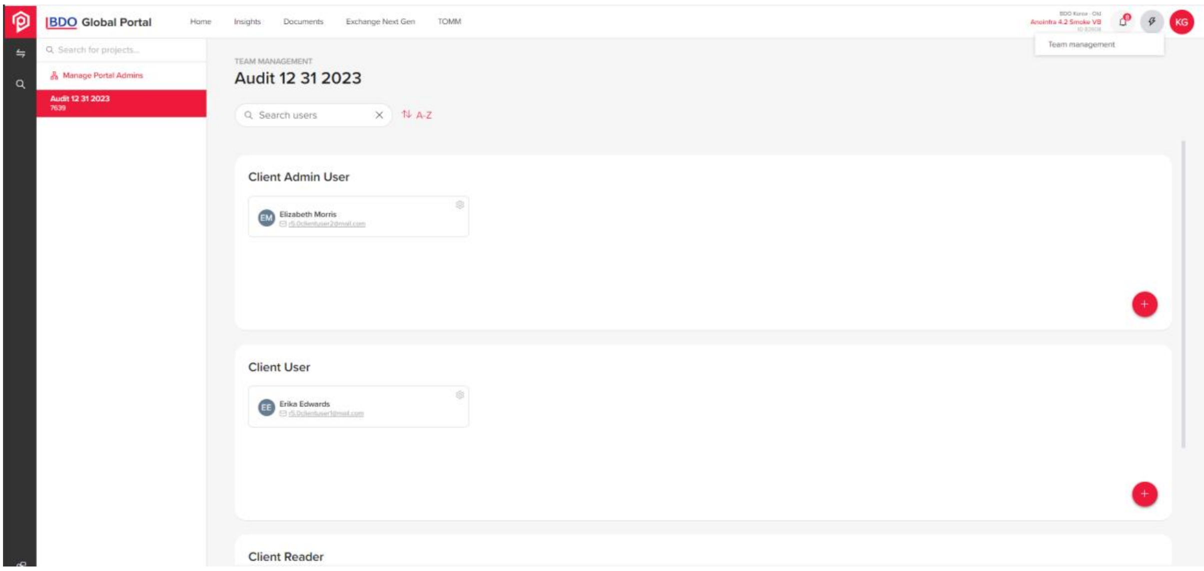
Please note that the **Client CP Admin** role has access to all projects under a portal. They cannot upload deliverables or complete tasks, unless they are assignees, but they can view tasks and files in Exchange Next Gen and edit files in the Documents library.

## 10.1 Team management page

Click the **Team management** option under the lightning bolt icon to load the page for managing access for users from your organization and then navigate to the desired project on the left.



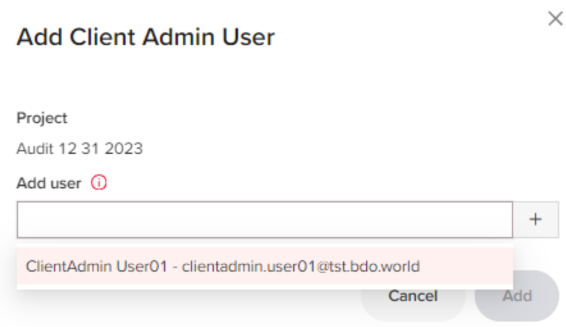

If you act as a Client CP Admin or Client Project Admin on a portal or project level respectively, you can add/remove users to/from the **Client Admin User** and **Client User** groups.

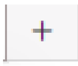


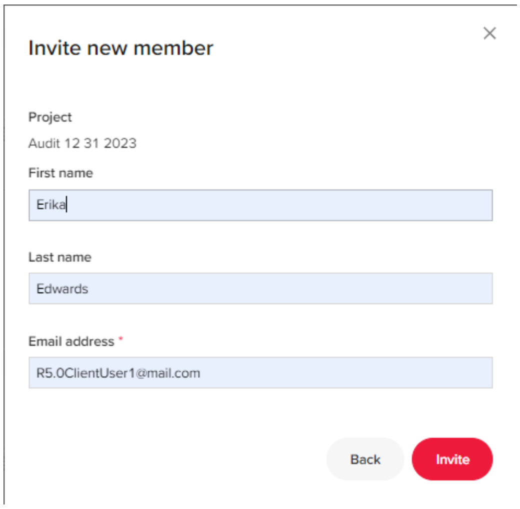

## 10.2 Add users to a project

To add a user to a group, click the red plus button .

- If you wish to add an already existing user to the Client Portal (i.e. a user that has access to one of the projects under the Client Portal or to the portal itself), you can select them from the people picker by typing their email address. Select the email address and click **Add**.

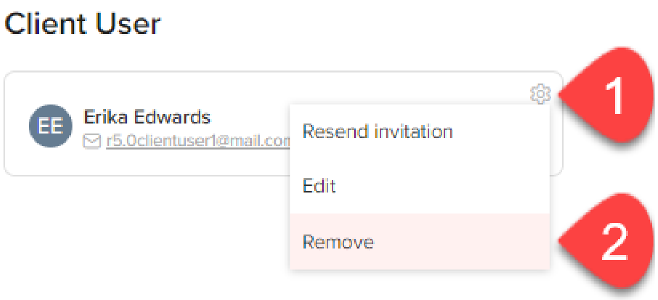



- If you wish to add a new user, click the plus button  and provide their names and email address and click **Invite**.

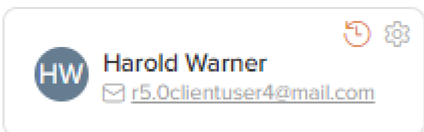



## 10.3 Remove users from a project

To remove a user from a group, click the gear icon next to the user's email and select **Remove**.

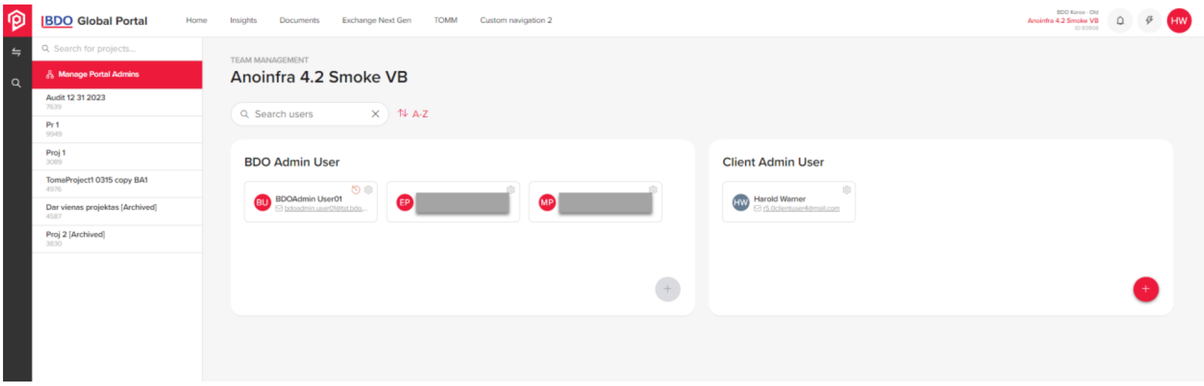



Users that were invited to a BDO Portal environment, but who have not accepted their invitation yet, have an orange watch icon in their name card.



Please note that adjustments to project permissions require time to apply fully and may not be reflected immediately.

## 10.4 Portal team management




If you are added as a **Portal level** Client Admin (Client CP Admin), you have access to the **Manage Portal Admins** menu and to all projects under this portal.

On the same page Client Admin users can also see users from the BDO Admin user group, but they can't make changes to the group.