BDO GLOBAL PORTAL

Client User Functional Overview

V 5.0
Date: 11 September 2022

CONTENTS

DOCUMENT DETAILS

VERSION MANAGEMENT

Version	Date	Author	Nature of amendment
3.1	Nov 2018	Steven Castillo	Initial version for GP release 3.1 (SUI)
3.1.1	Feb 2019	Julia Volhina	Standardized visuals, updated info.
3.2	Apr 2019	Julia Volhina	Added info about placeholder variables in emails
	Apr 26 2019	Julia Volhina	Added info about single quote search not supported in Client search
3.1.2	Jun 2019	Julia Volhina	Updated screenshots for the 3.1.2
3.3	Aug 2019	Julia Volhina	Added updates
3.4	Jan 2020	Bhavna\Kiran	Added refactor updates
3.5	April 2020	Veslava	Added updates
3.5	April 2020	Karolina Mala	Created Client User Functional Guide
4.0	June 2020	Kritika Goel	Added updates
4.1	September 2020	Žilvinas Katinas	Added updates
4.1	September 2020	Dovydas Dainys	Reworked Point 3.5 for Documents Page
4.2	November 2020	Dovydas Dainys	Added updates
4.3	March 2021	Dovydas Dainys	Updated points 3.4 and 3.7
4.3	April 2021	Dovydas Dainys	Updated document for 4.3
4.4	August 2021	Dovydas Dainys	Updated document for 4.4
4.5	October 2021	Žilvinas Katinas	Updated document for 4.5
4.6	December 2021	Dovydas Dainys	Updated document for 4.6
4.6	March 2022	Vita Lukoseviciute	Updated document for 4.6
4.6	March 2022	Inga Plankienė	Updated document for 4.6
4.6	March 2022	Inga Plankienė	Updated document for 4.6
4.6	March 2022	Justas Leščinskas	Updated document for 4.6
5.0	September 2022	Karolina Mala	Updated document

Reviewer

Name	Version	Date
George Marriott	3.5	3 April 2020
Karolina Mala	3.5	14 April 2020
Karolina Mala	4.0	4 June 2020
Karolina Mala	4.1	30 September 2020
George Marriott	4.1	10 October 2020

Karolina Mala	4.2	12 November 2020
Karolina Mala	4.3	7 April 2021
Karolina Mala	4.4	10 August 2021
Karolina Mala	4.5	15 October 2021
Karolina Mala	4.6	7 March 2022
Karolina Mala	5.0	7 March 2022

Intended audience

Target Audience
BDO Global Portal project team
BDO Client user
Vendors for further development of the BDO Global Portal
Servicedesk
Support team

1. HOW TO USE THIS GUIDE AND RELEASE UPDATE

This document gives an overview of the functionality of the BDO Global Portal from the Client User perspective.

BDO Global Portal is changing significantly in Q3 2022. While we're witnessing the merge between Exchange and Organise resulting in Exchange Next Generation (Exchange Next Gen), the Global Portal 5.0 release is bringing exciting improvements for an enhanced user experience.

As of Release 4.1, we will highlight updates relevant to the particular release. Each topic will include a page number and a bookmark, leading to the detailed information. To be able to use the button link please **download** the Functional Guide document to your drive and display in the "Read mode" or use "CTRL" and click to open the link. If you display the document online, the links will not work.

2. BDO GLOBAL PORTAL LANDING PAGE USER GUIDE

Go back to the Release list

2.1 GLOBAL PORTAL LANDING PAGE

The landing page was redesigned to greet the user, display important and relevant information and to simplify getting familiar with the BDO Global Portal.

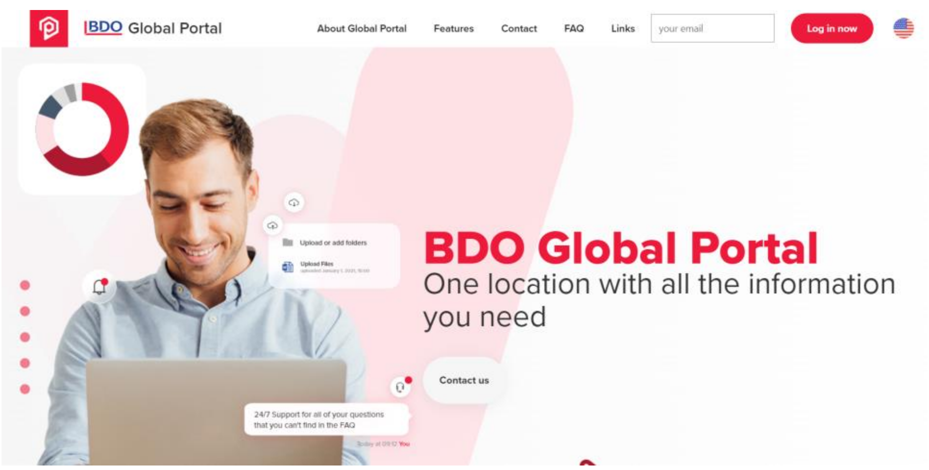
The pages' URL is: https://globalportal.powerappsportals.com/

At the top of the page is a navigation ribbon with BDO Global Portal logo, titles and buttons to redirect to other Portal sections.
At the right side of the navigation ribbon is a language selector and a Log in button together with email input field.

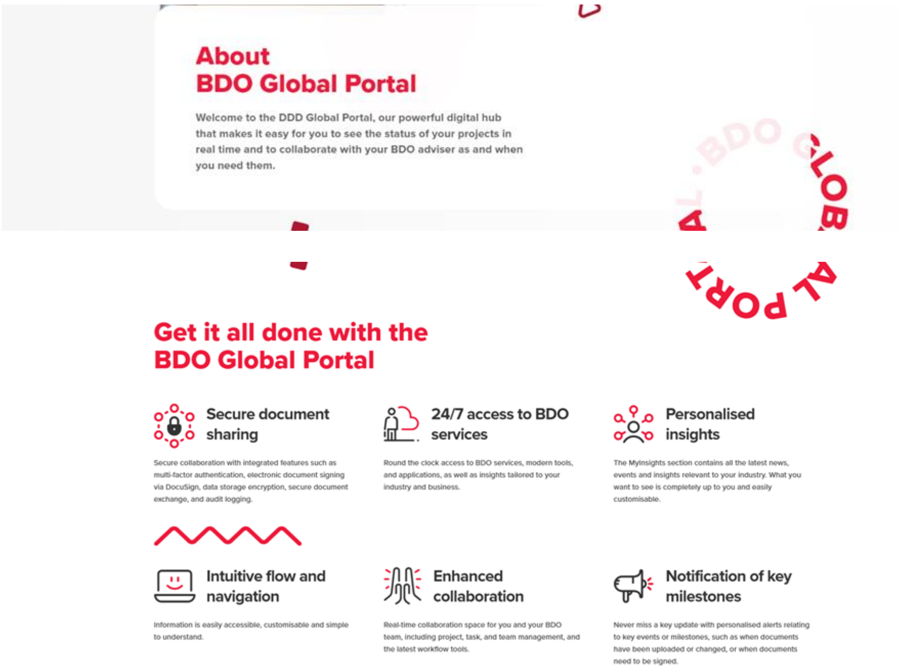
Languages available:English (Default, US Flag)

- French
- Spanish
- German
- Norwegian

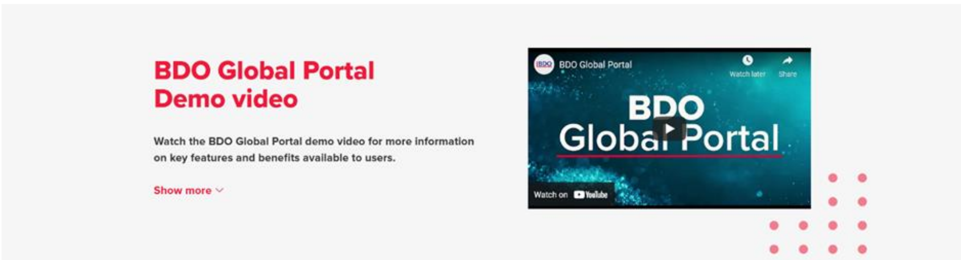
Primary part of the page shows introductory text, images and a "Contact Us" button redirecting the user to the "Contacts Us" section.

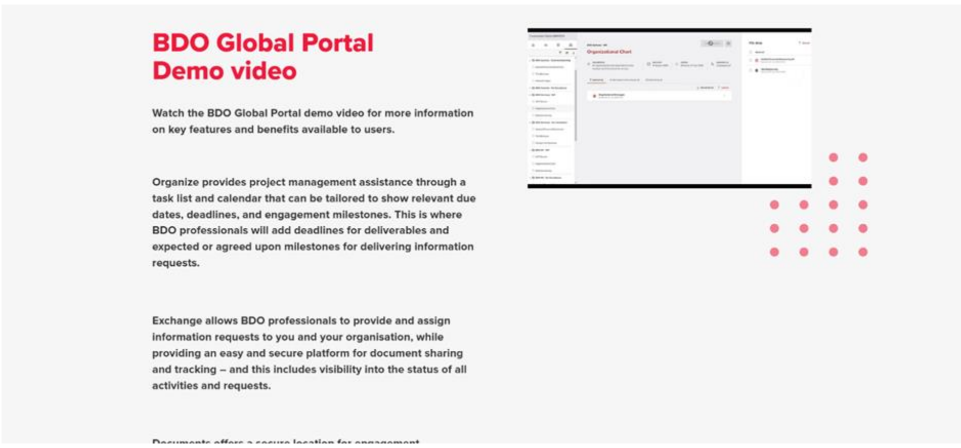


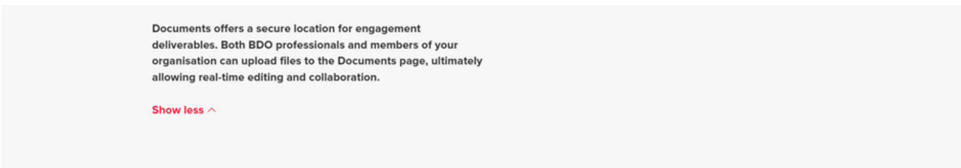
„About BDO Global Portal" section provides a quick summary about Portal, followed by the "Get it all done with the BDO Global Portal", describing key advantages of using the BDO Global Portal.



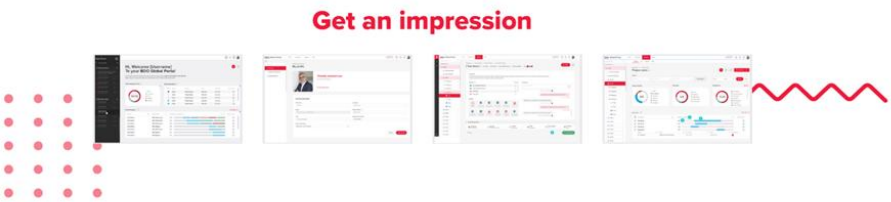
Portal demo video is available in the “BDO Global Portal Demo Video” section together with option to “Show more” about the Portal displaying comprehensive Portal description.







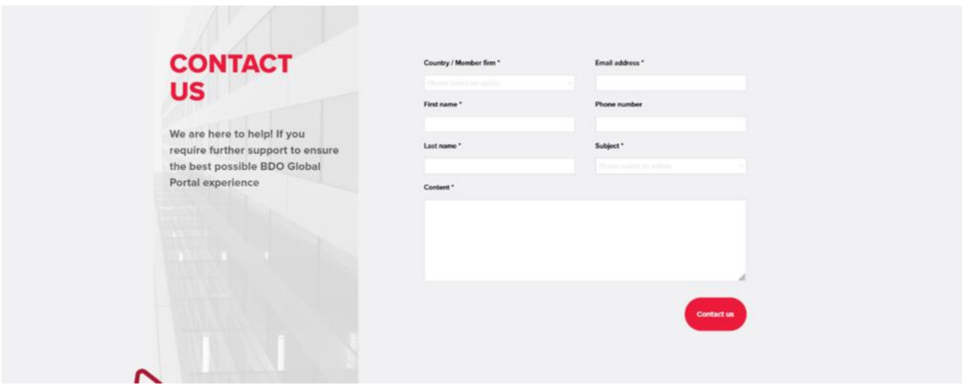
The “Get an impression” shows screenshots for a quick Portal preview.



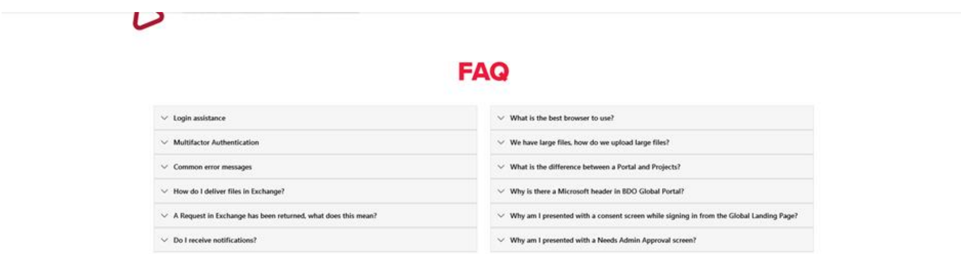
In “Contact Us” users will be able to send inquiries to BDO through seven editable fields:

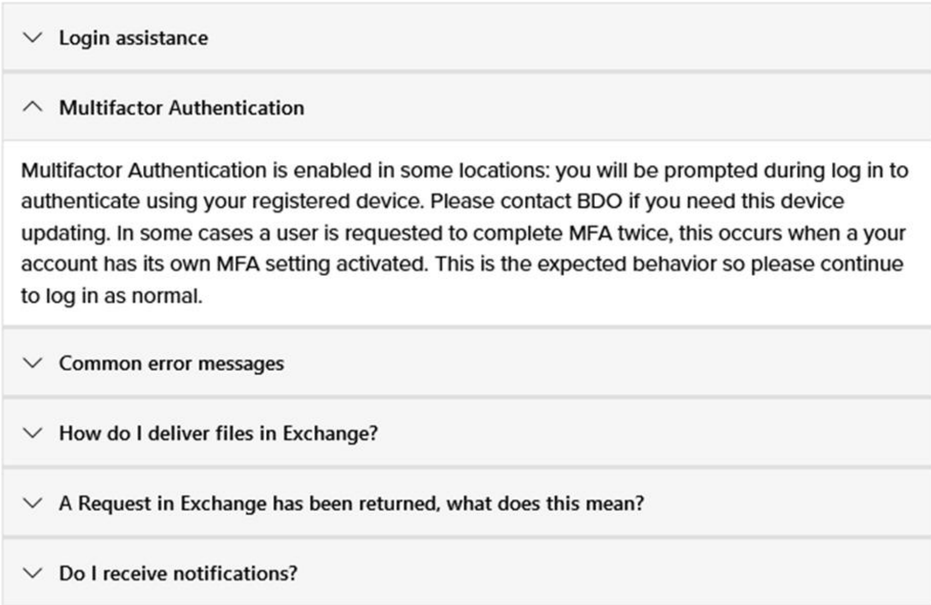
- First Name (Mandatory, free text field)
- Last Name (Mandatory, free text field)
- Email Address (Mandatory, free text field)
- Phone Number (Optional, free text field)
- BDO Firm (Mandatory, drop-down)
- Subject (Optional, drop-down):
    - I have issues with log in
    - I want more information about the Portal/BDO
    - Other topic
- Question or Comment (Mandatory, free text field)

- Clicking the “Contact Us” button will send the inquiry (this feature will be developed in a future US)



The FAQs collect most common questions. Only one can be opened at a time. Useful Links section store most important links.





Links:

- BDO Canada, Support page - https://www.bdo.ca/en-ca/special-pages/global-portal/
- BDO USA, Support page - https://www.bdo.com/client-center/bdo-global-portal-resources
- Emma, Global Portal Chat bot - https://emma.bdo.com/

The Contact Information section provides Social Networks links.

Socials:

- Twitter: https://twitter.com/BDOglobal
- YouTube: https://www.youtube.com/user/BDOInternational
- Linked: https://www.linkedin.com/company/bdo-international/?trk=biz-companies-cym
- Web icon should navigate to: https://www.bdo.global/en-gb/home.

The Tech Admin can edit all content inside the page if they have a power apps subscription for the appropriate environments. Visit make.powerapps.com

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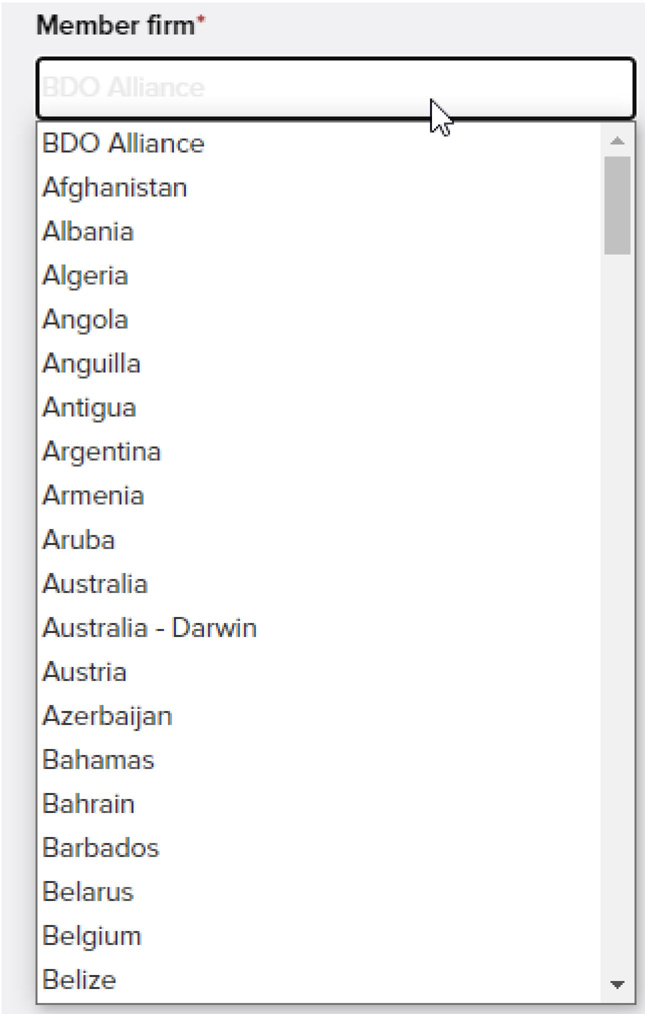
2.2 "CONTACT US" SECTION

In case of any question or issue, the Service Desk can be contacted through the "Contact Us" form on the Global Landing Page by filling and sending the request

The form has mandatory and optional fields:

1. Member Firm – a list of all Member Firms that can be selected (Including Alliance and 'Other' options) (Mandatory)



1. Email Address -user contact email (Mandatory)
2. First and Last Name – two fields (Mandatory)
3. Phone Number -preferred contact number (Optional)

4. Subject – a list of possible issue subject (Mandatory)
   Options:

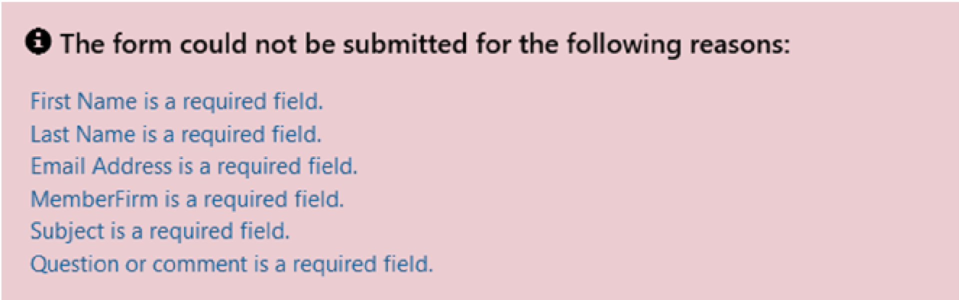
   a. “I have issues with log in;”

   b. “I want more information about the Portal/BDO;”

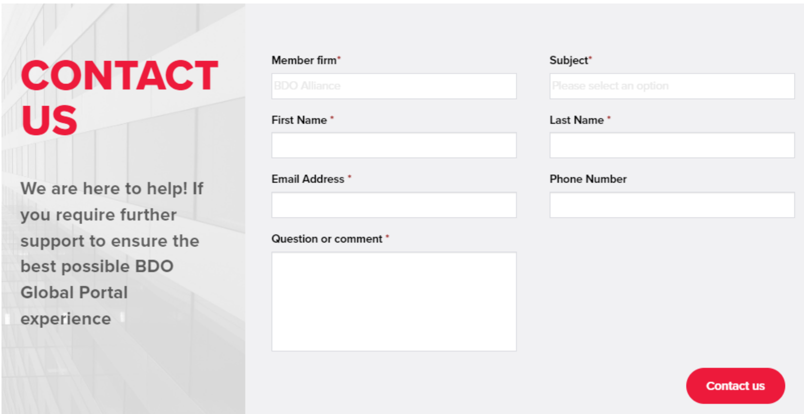
   c. “Other topic.”

5. Content – a free text entry field to describe the issue details (Mandatory)

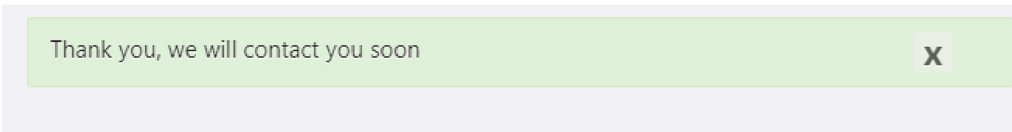
   Mandatory fields must be populated before sending.



Note: The Content field can be expanded by dragging the bottom right corner as desired.



Pressing the “Contact Us” button will send the request and the user will be receive a “Thank you, we will contact you soon” success message.



After that the Service desk will receive an automatised email template filled with the input information:

Email Address - *servicedesk@bdo.global*.

Hello Service Desk,

A user has contacted us through the GP Landing page. Please help them to solve their problem.

Here is the information that user provided in the Contact Us form:

Member Firm: {MemberFirmName}

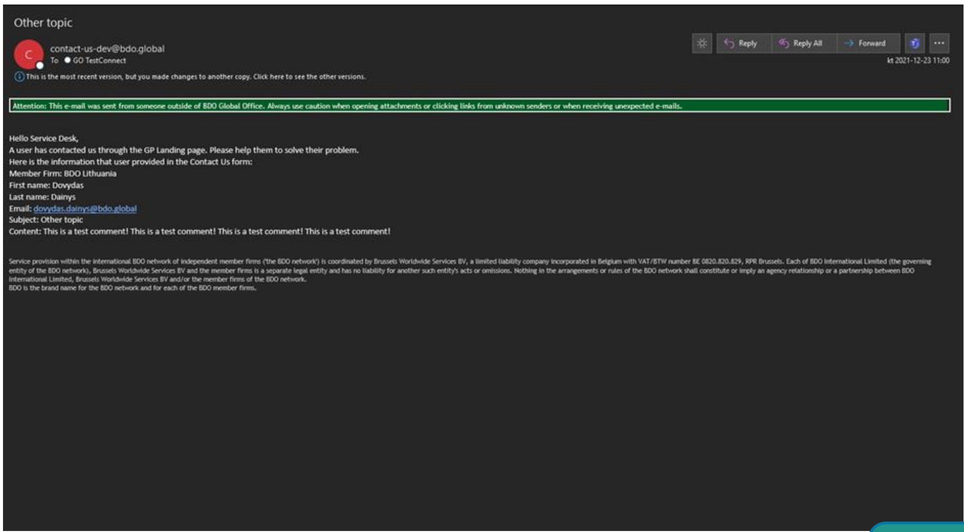
First name: {FirstName }

Last name: {LastName}

Email: {email}

Subject: {subject}

Content: {content}



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2.3 GLOBAL PORTAL LANDING PAGE LOGIN

A new Login page encompasses all tenants, simplifying the access to all Portals through the Landing Page assigned to the user.

This option can be used by Global Portal Users.

In the Global Landing Page, the user enters his email address, clicks on the "Log in now" button and is redirected to the BDO login and authentication page. Once the user is successfully logged into the system, depending on the scenarios the right tenants Welcome Page is displayed:

If the user does not exist in Cosmos DB or does not have any Client Portals – they get informed by an error message during login.

- If the user does exist in Cosmos DB or already has Client Portals:
  - If no Client Portals have been visited previously a randomly selected Portal, the user has access to, will be used to allocate the correct tenant

- If a Client Portal has been visited previously – The last used Portal, the user still has access to, will be used to allocated the correct tenant

After the first sign-in, the user would see a one-time consent dialog that requires them to consent to basic profile information (e.g., email address) being shared with BDO. The user will be redirected to Client select screen only after consenting.

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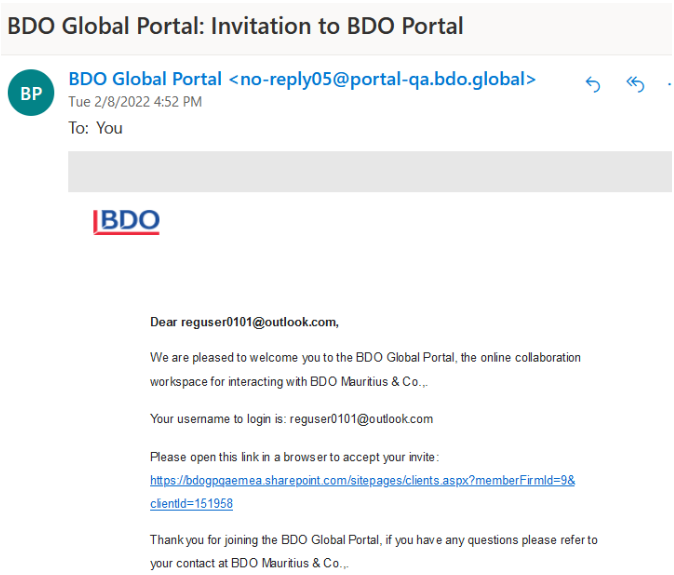
3. BDO GLOBAL PORTAL CLIENT USER GUIDE

3.1 INVITATION AND LOGGING INTO BDO GLOBAL PORTAL

New Client users can access BDO Portal only after they have been invited to it by a BDO employee. Client users who are new to the BDO Global Portal environment will receive an email invitation which they need to accept to be able to log into the BDO Global Portal.


BDO Global Portal: Invitation to BDO Portal

BP BDO Global Portal <no-reply05@portal-qa.bdo.global>
Tue 2/8/2022 4:52 PM
To: You

BDO

Dear reguser0101@outlook.com,

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

Your username to login is: reguser0101@outlook.com

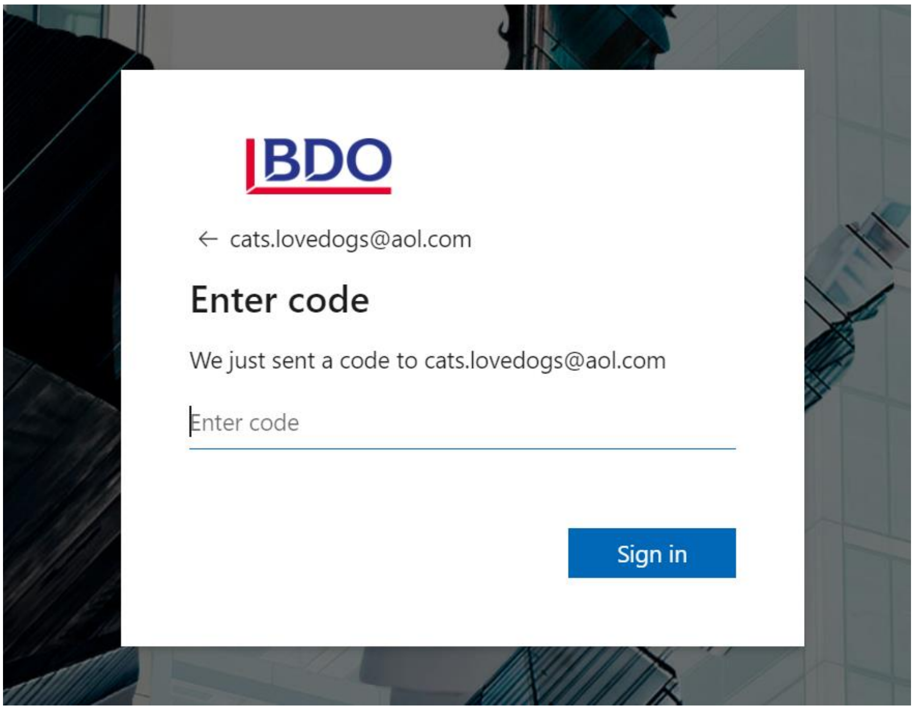
Please open this link in a browser to accept your invite: https://bdogpqaemea.sharepoint.com/sitepages/clients.aspx?memberFirmId=9&clientId=151958

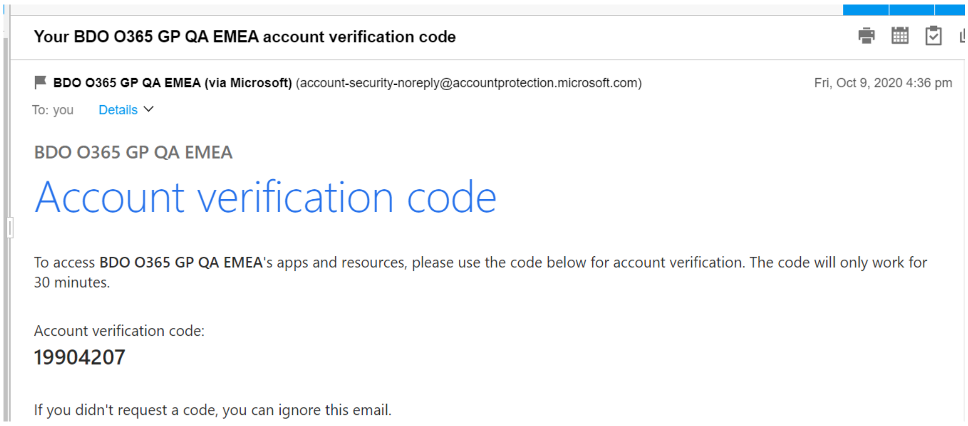
Thank you for joining the BDO Global Portal, if you have any questions please refer to your contact at BDO Mauritius & Co.,.

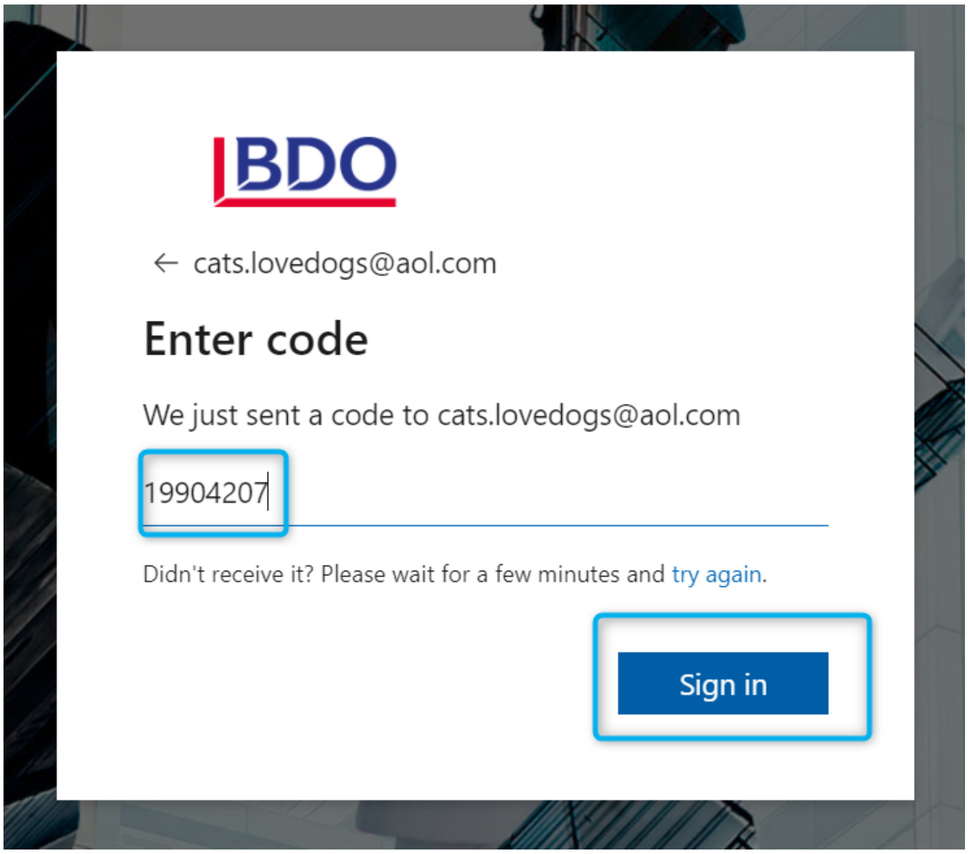
To accept the invitation, the Client user needs to open the invite link and type in given username to log in to the Portal. If the Client user is using a Microsoft account, they enter given username and password and log into their existing Microsoft Account.

If the Client user has a non-federated account, e.g. Gmail, Hotmail, etc., the log in process requires a one-time password. This one-time password is sent to the Client users' mailbox, they then need to take the code from this email and input it into the login field.


BDO
Sign in
cats.lovedogs@aol.com
Can't access your account?
Sign-in options
Next
Through this page you are signing-in into a BDO Global IT application. Do not share your sign-in credentials. Contact servicedesk@bdo.global for support.


BDO
cats.lovedogs@aol.com
Enter code
We just sent a code to cats.lovedogs@aol.com
Enter code
Sign in





We recommend your Clients bookmark the BDO Global Portal website for ease of future access. If your Client users have issues logging in, please log a ticket with the Global IT Service Desk.

3.2 CLIENT PORTAL DISPLAYED ON FULL WIDTH

3.2.1 Portal pages expanded to full width

All pages are made to the full width of the screen. All changes are visual and pages functionality did not change.

NOTE: *the Home page of the Client portal is not made to the full width of the screen due to the technical limitations.*

3.2.2 Top bar menu expanded to full width

The top bar menu was adjusted to the full width of the screen. All changes are visual, and the functionality of the pages did not change.

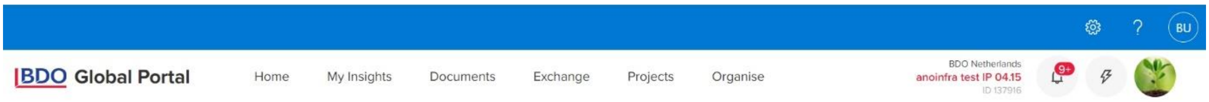
The SharePoint line where BDO logo and Member Firm name were displayed was removed from the main pages.

The Notification bell icon and Profile settings icon is available all the time, the Lightning icon appears when the Client Portal is selected. All icons expand the same menu as before.

There were no changes made for the user groups and how they can reach and manage the pages.

Instead of the BDO Member Firm name, currently the BDO Global Portal is displayed and was moved from the SharePoint line to the left side of the top bar menu.

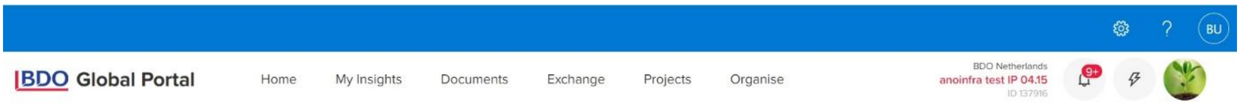
The Member Firm name, Portal name, and Portal ID stays on the right side of the page. The Portal name is marked in red.



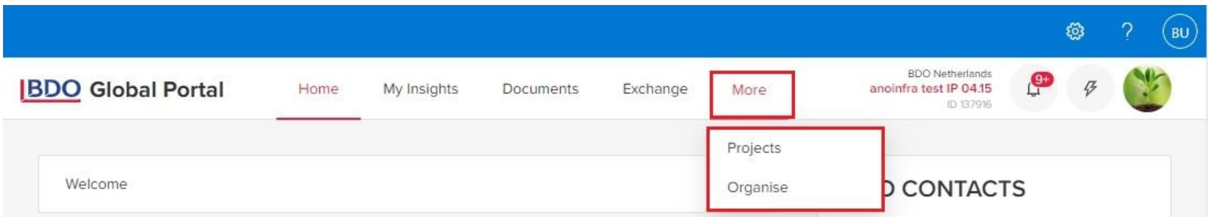
The User navigates to the Client Portal -> Personal settings -> My Profile and upload a picture. When a picture is uploaded, the Profile settings icon bubble on the right side of the top bar menu shows the uploaded picture. Otherwise, the user initials are shown as an avatar.

The top bar menu is responsive to a large monitor screen, laptop screen and mobile screen.

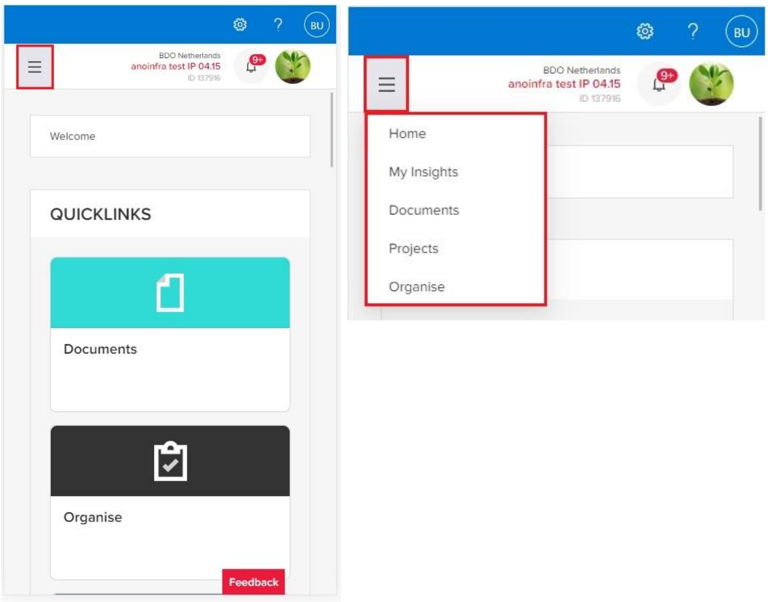
On the large screen (more than 992 x 970px), the top menu is expanded and all menu items are visible. If some items do not fit in the menu they are hidden behind the button "More".



On the laptop screen (992 x 970px) if the items do not fit in the menu, they are hidden behind the button "More".



On the mobile screen (576 x 970px) menu items are hidden behind the hamburger icon.



All other pages work as usual and have the same functionality as before.

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3.3 AT FIRST LOGIN

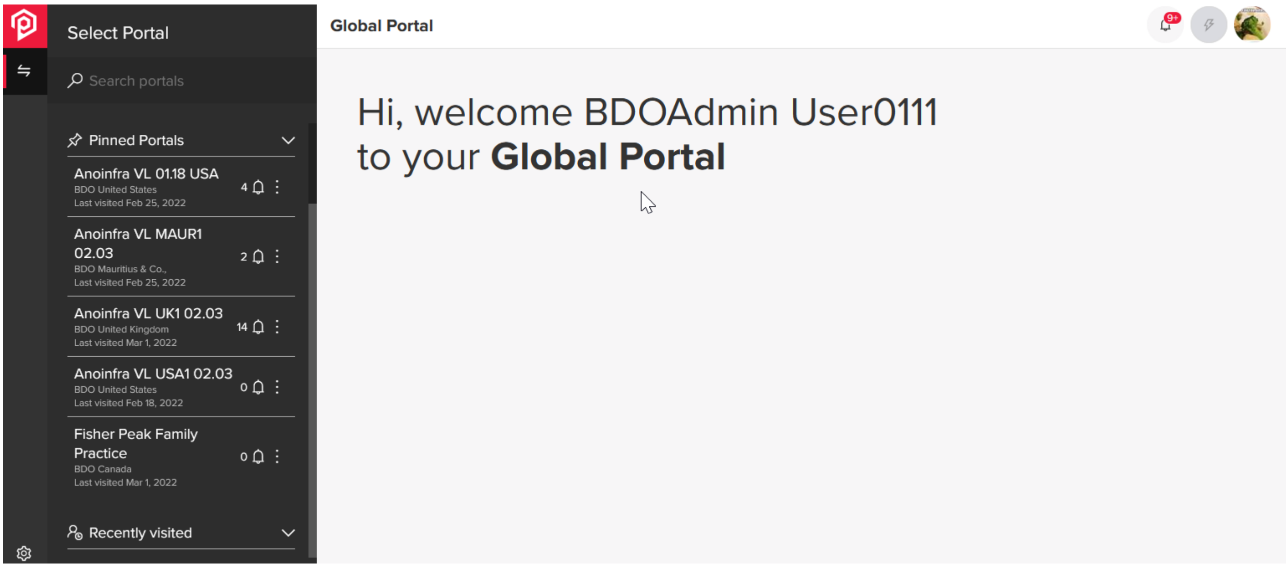
3.3.1 Select a Client Portal

Client users, who have access to multiple Client Portals and/or tenants, will be able to select which Client Portal they want to work in, from all Portals from all tenants in one place.

The select Client screen is displayed and has a welcome message "Hi, welcome [username], to your Global Portal".

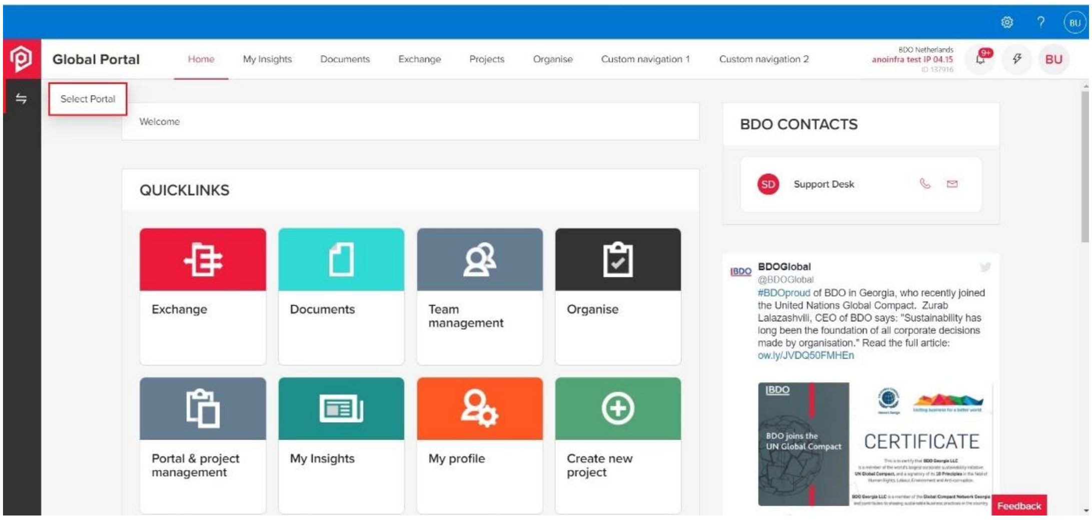
On the right side of the top bar menu "Lightning" icon is disabled. The icon has a tooltip hover, which says "Portal must be selected". Other icons: "Notification bell" and "Personal settings" are enabled. They show Global settings of notifications and personal settings.

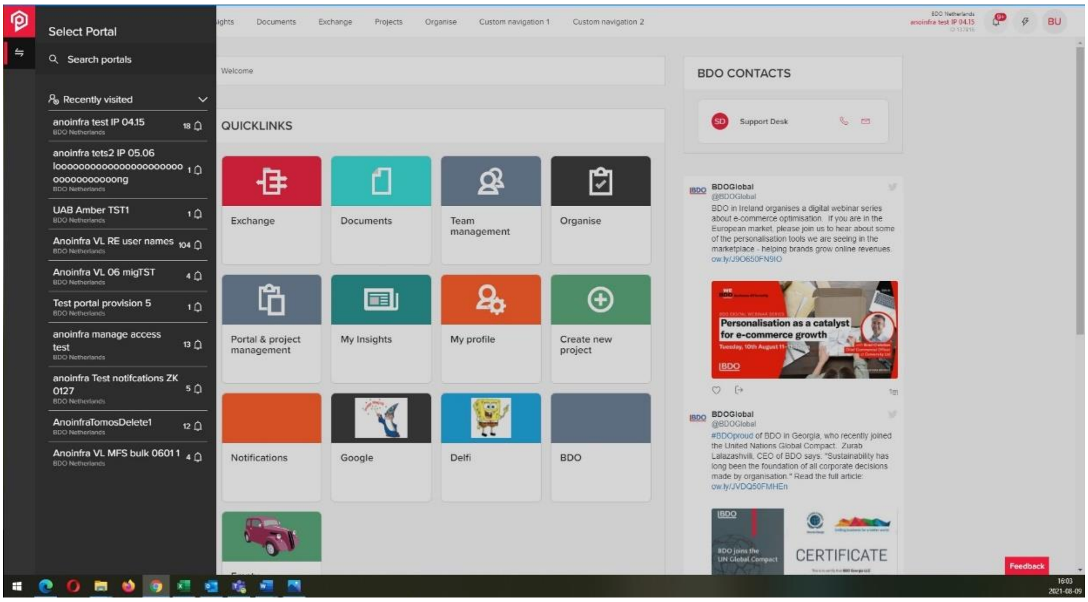
The Select Portal menu on the left side of the black sidebar is expanded by default e on the Client select page and not possible to be closed.

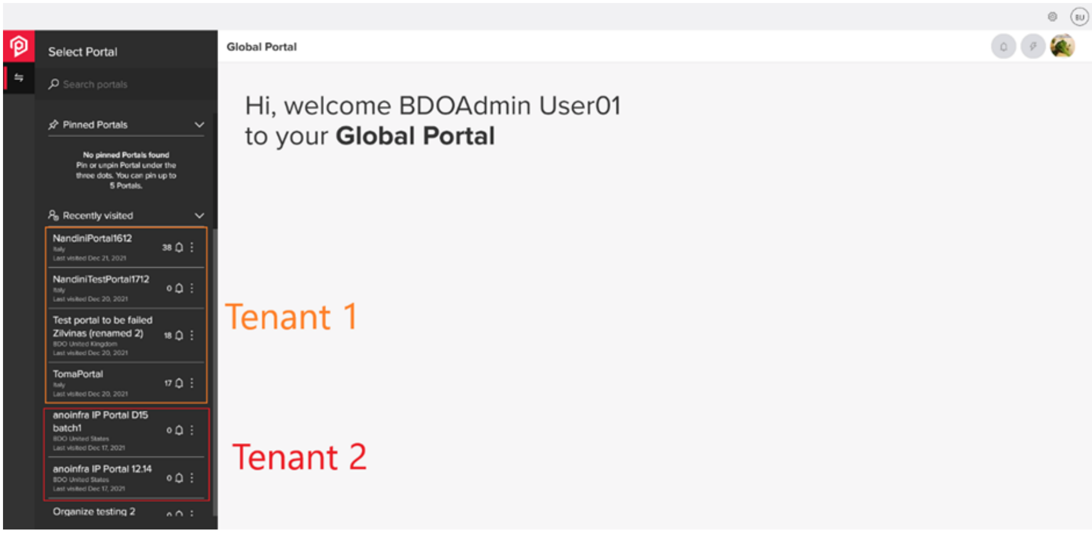


If the Client has only one Portal available, this particular Portal will automatically be selected for them.

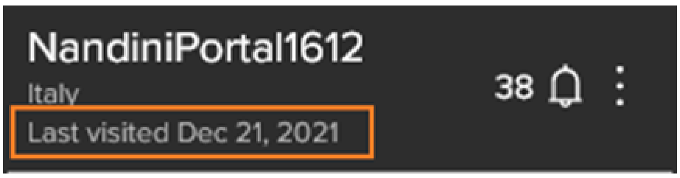
Client users, who are working with more than one Portal can switch to another Client Portal by using the black side bar on the left:



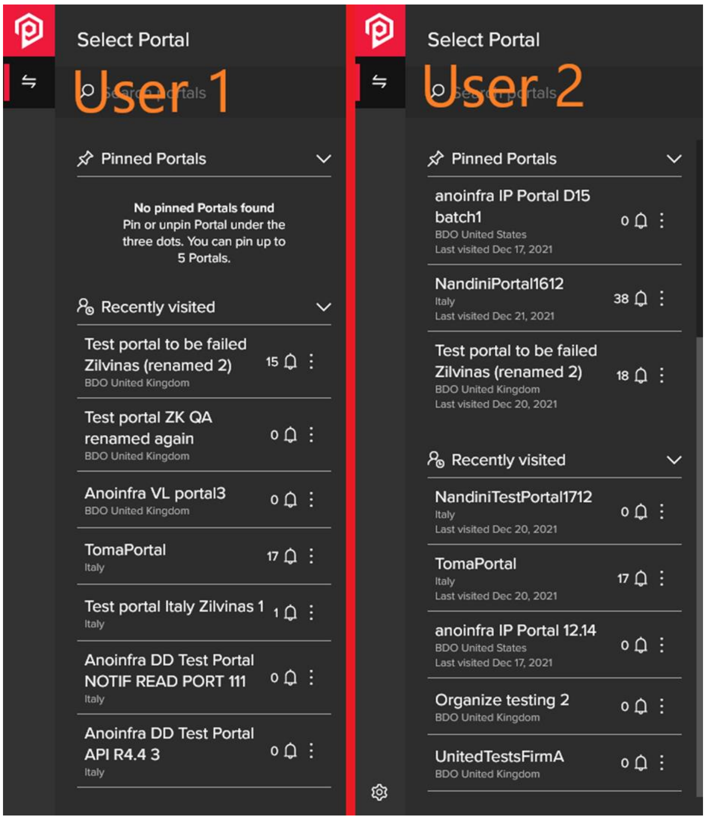




Portals will be sorted by a new value, the Last Visit Date, displayed right next to each Portal in the side bar. This feature is user specific, therefore a unique Portal selection list will be sorted by Portals visited the most and updated during Portal opening.



Portals are sorted by Last Visit Date - Descending *(Newest one at the top)*



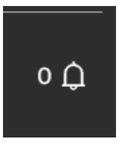
It is possible to look up for Portals within the „Select Portal“ menu through the search field with "Search portals" text. Recently visited Client Portals list is provided and visible during all sessions in the black sidebar.

On the right side of the top bar menu, next to the Client Portal name is displayed a Notification bell icon showing number of actual notifications.

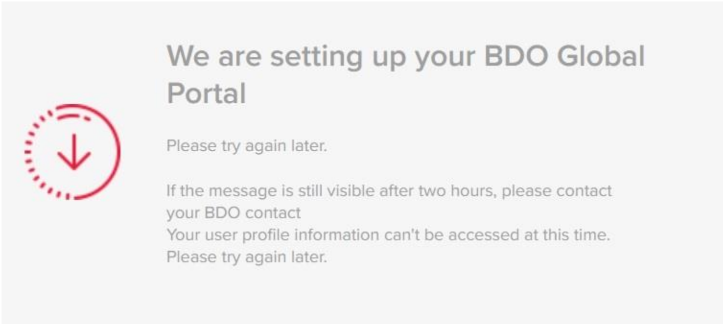
When a user selects the Client Portal, spinner shows while the selected Client Portal is being loaded. The user is redirected to the "Home" page of the selected Client Portal and the Select Portal menu closes.

The search is automatically triggered when the user starts typing in the search field. If the search field is empty „Recently visited“ Client Portal list is visible. The search results appear instead of the „Recently visited“ Client Portal list. If there is no data according to search text, there is a text „Nothing found. Please change or specify your search“.

User logs into the Global Portal and notices that on the right side of each Client Portal there is a new icon, just like the notification bell, indicating the unread notification count for that Portal and the Projects the specific user has access to. If there are no unread notifications:



NOTE: When a new Client user is being onboarded, a warning message is displayed „We are setting up your BDO Global Portal. Please try again later“ while the account is being set up. All other pages work as usual and have the same functionality as before.



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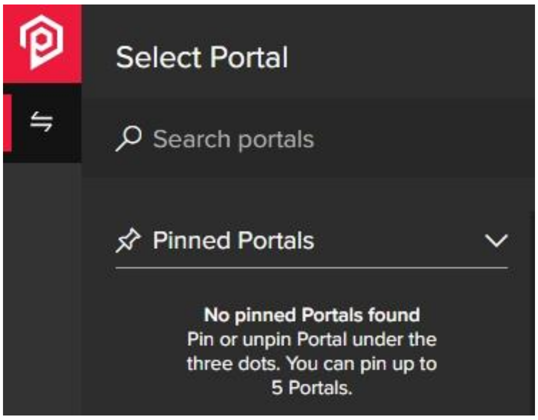
3.3.2 Possibility to Pin/Unpin Client portals

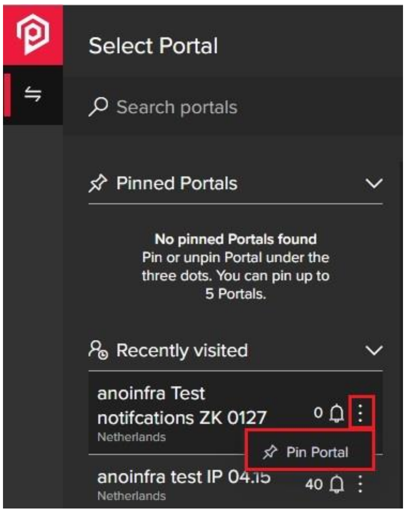
The User can pin up to 5 Client Portals in the black sidebar. The pinned Portals will be at the top of the Select Portal menu in the Pinned Portals section.

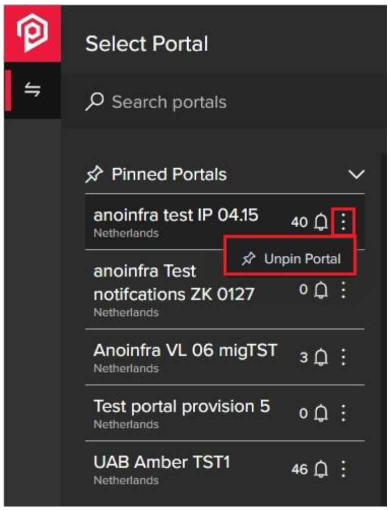
Until there are no pinned Client Portals, the message is displayed: "No Pinned Portals found \n Pin or Unpin Portal under the three dots. You can pin up to 5 Portals".



Pinning a Portal is possible through the three dots menu next to the Client Portal name in the Recently visited section. The Pin Portal tooltip is displayed and the pinned Portal is moved to the Pinned Portals section.

The user also can unpin the Client Portal in the Pinned Portals section, in the same way, clicking three dots and choosing Unpin Portal. Unpinned Portals are moved back to the Recently visited section.



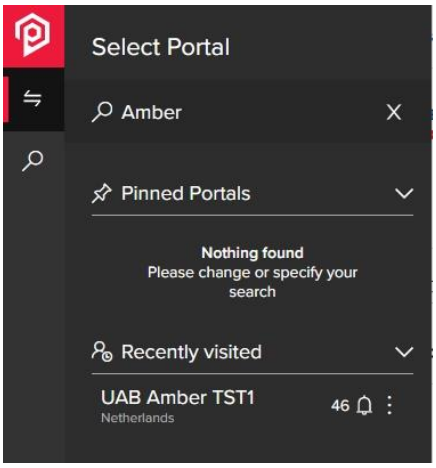


User can pin up to 5 Client Portals. If the user will try to pin one more Client Portal, the option is disabled and has a hover: "You can pin up to 5 Portals".

Pinned Client Portals are listed in alphabetical order. Pinned Client Portals list holds Client Portal name and the Member Firm name is displayed under. The bell icon with the notifications number is displayed next to the Client Portal name.

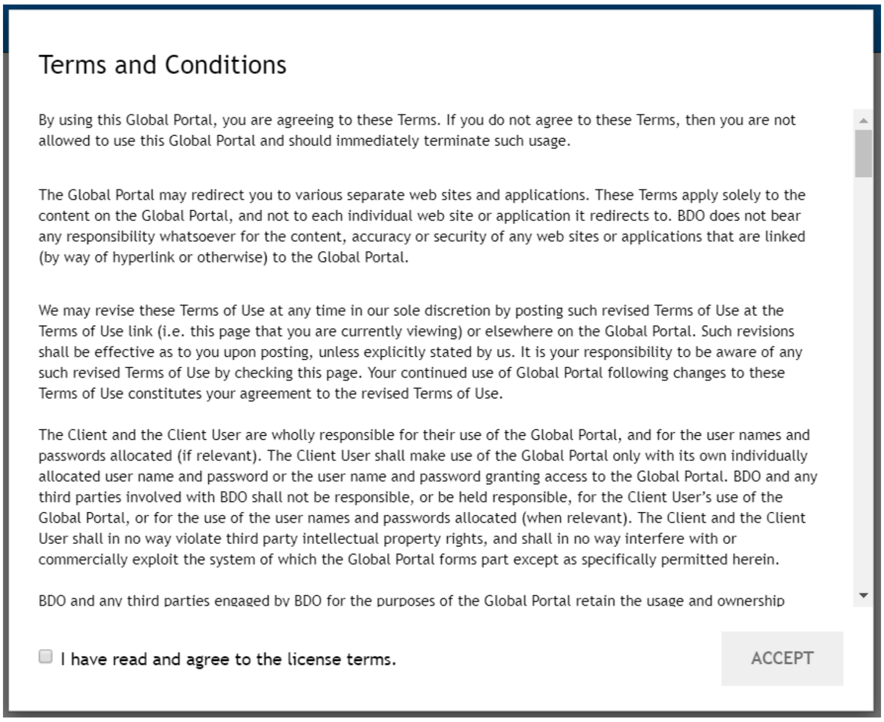
Clicking the pinned Client Portal, the user is redirected to the selected Portal Home page.

The Portal search triggers both sections: Pinned Portals and Recently visited. If the search does not find the searched Portal in Pinned Portals, a message is displayed "Nothing found Please change or specify your search".

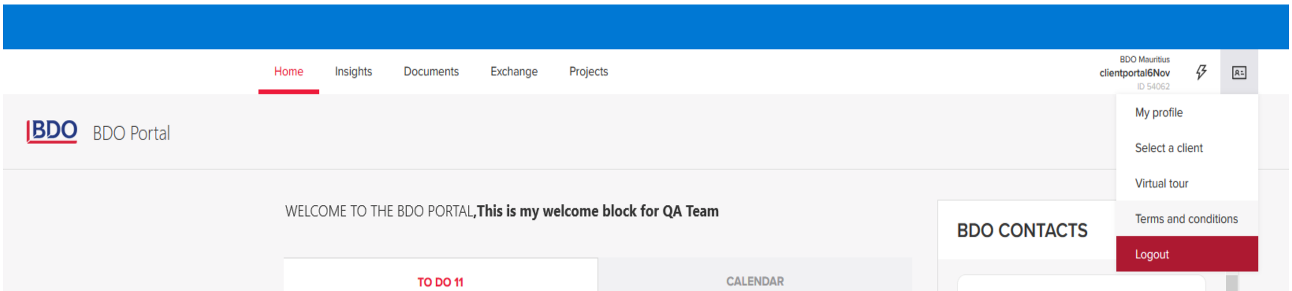


3.3.3 Terms and Conditions

All Client Users must accept the Terms and Conditions upon first login to the BDO Global Portal. If the Terms and Conditions are updated, then the user will be prompted to reaccept them.



The Terms and Conditions can be reviewed at any time under the 'Portal Menu'.



3.3.4 Welcome pop up for new Client users

The Client users can now be added without first and last names.

When the Client name, surname and language culture is missing, a pop up during login is displayed in the window to:

a. Enter the First name and Last Name values
   i. These fields are prefilled if details were provided when the Client user was added
   ii. Both fields are mandatory

iii. Text fields that cannot be longer than 50 characters

b. Email address is greyed out and cannot be edited

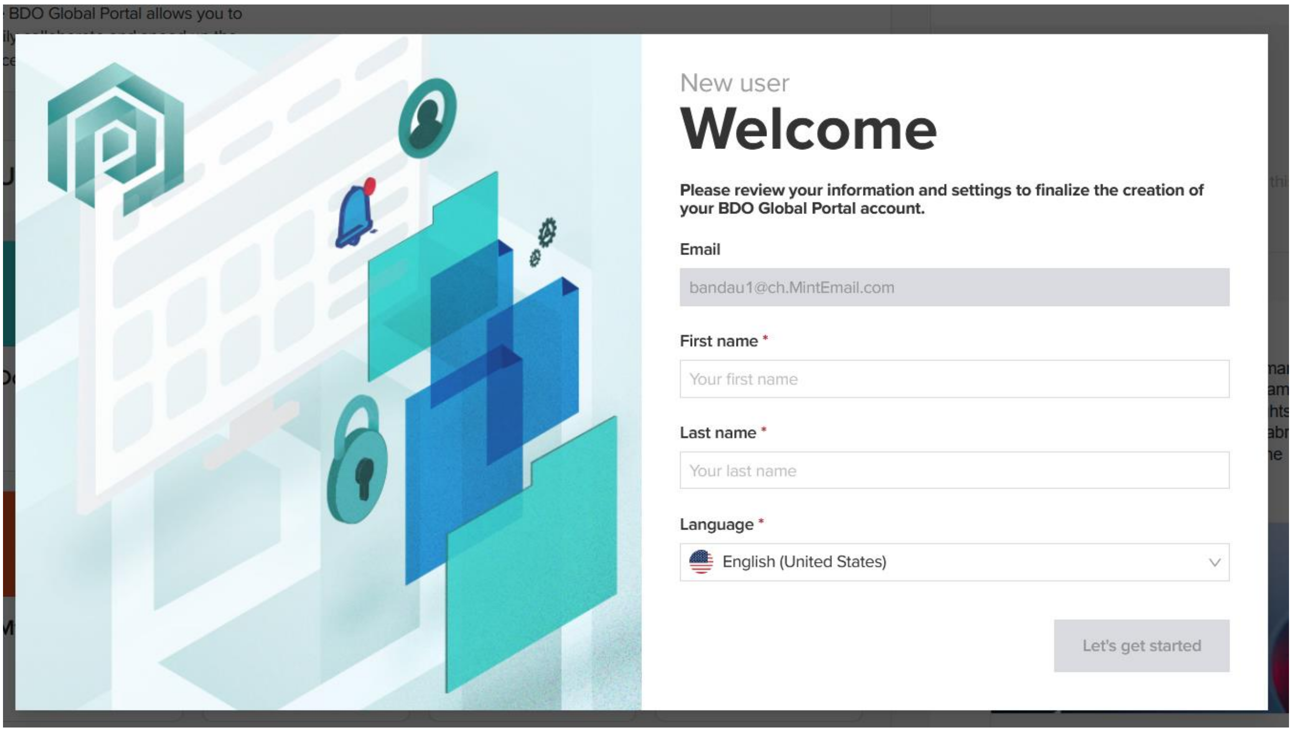
c. Select the language

i. Language list is the same as in My Profile

ii. Language is set to default language for the Member Firm but can be changed as per user preference

The user cannot close the window leaving the First Name and Last Name fields empty. Upon such an attempt the error message is displayed.

After filling the mandatory fields and submitting the data entered/selected, First Name, Last Name, preferred language values are updated in My profile.



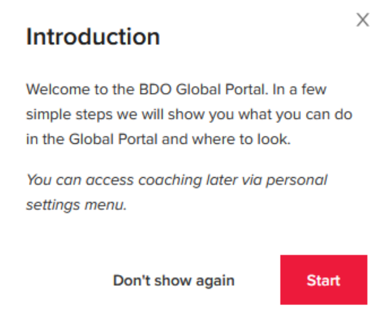
3.3.5 Coaching sessions

The BDO Global Portal has new functionality: Coaching session. The coaching session provides all users an introduction to the Portal pages and its functionalities.

If the Coaching session is enabled for the Member Firm, all new users (BDO and Client) in that Member Firm will receive the Coaching session on their first login to the BDO Global Portal (first login after the Coaching session is enabled). This session will appear as a pop up.

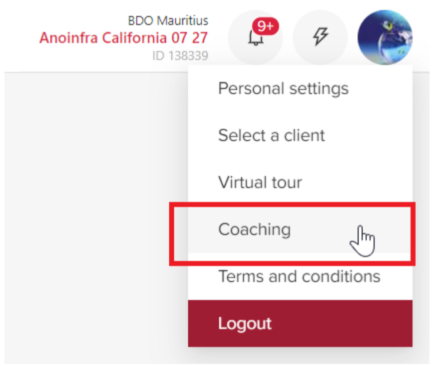
New users to the BDO Global Portal will receive more pop ups, appearing in this order: Terms/conditions -> Welcome page for new users -> Coaching session -> Virtual tour -> Business message (if all these features are activated; not activated features will be skipped).

Coaching session starts with first pop up window – “Introduction”. “Introduction” has two options: “Don’t show again” and “Start”.

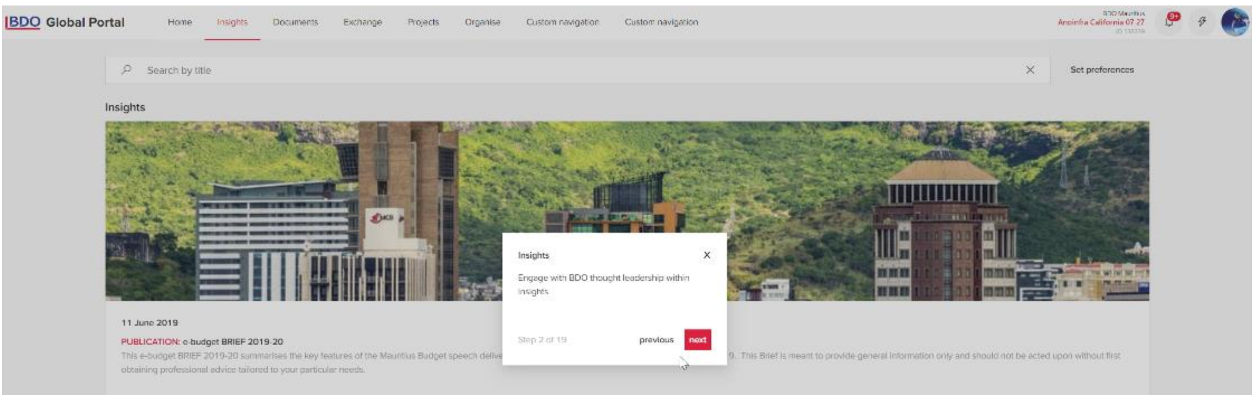


If a user presses “Start”, Coaching session begins. If a user presses “Don’t show again”, the session will be closed.

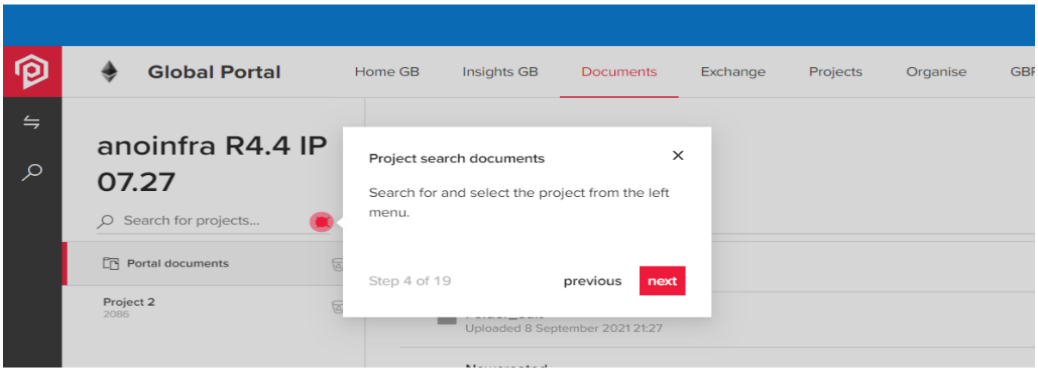
If the user wants to access the Coaching session again, he can find it on Top menu below user’s avatar icon (i.e. user’s initials or profile image if it was uploaded) as long as the Coaching is enabled for the Member Firm:

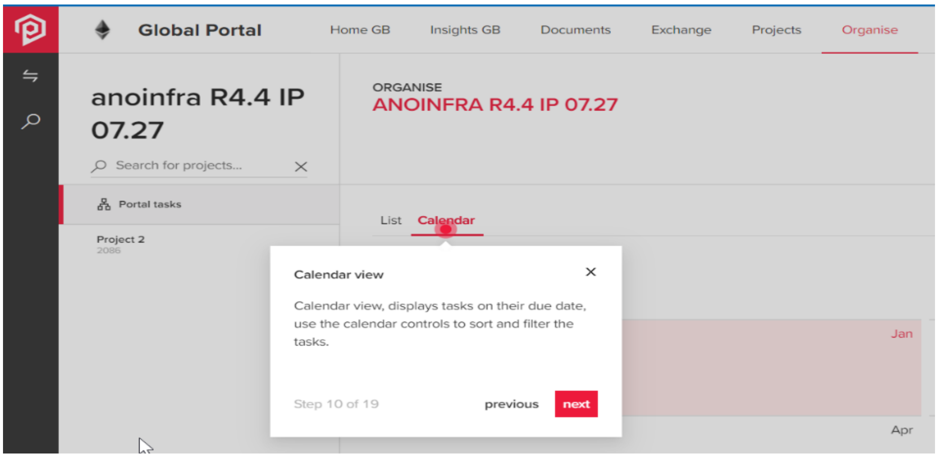


Users will see each coaching step with the title and the text, buttons “next” or “previous” for going forward or returning 1 step back:



Users are navigated to the different pages of the Client Portal according to the Coaching steps: Home, Insights, Documents, Exchange Next Gen, etc.





While the Coaching session is opened, none of the Client Portal's functionality is working – the user must finish the session by completing all Coaching steps or close session by pressing "X". The session can be finished at any step of the Coaching.

When the user finishes the Coaching session by completing all Coaching steps, the user is navigated back to the Home page of the Client Portal. If Coaching is closed by pressing "X", the user stays in the Portal's page on which he closed the Coaching session. The coaching can be turned on and off as many times as needed. If previously completed or closed pressing "X", the Coaching will then start from the first step which is turned on in the list of the Coaching steps.

If some part of the Client Portal functionality is disabled or not applicable for a Member Firm or for a Client Portal - related Coaching steps are not displayed in the Coaching session for the user, e.g., Insights, Exchange Next Gen.

The Coaching session can be re-initiated for all users (even for those who already have finished the Coaching session). This might happen if there were changes made to any of the Client Portal's pages or features. All or some of the Coaching steps can be enabled for the re-initiated session. There are 20 Coaching steps.

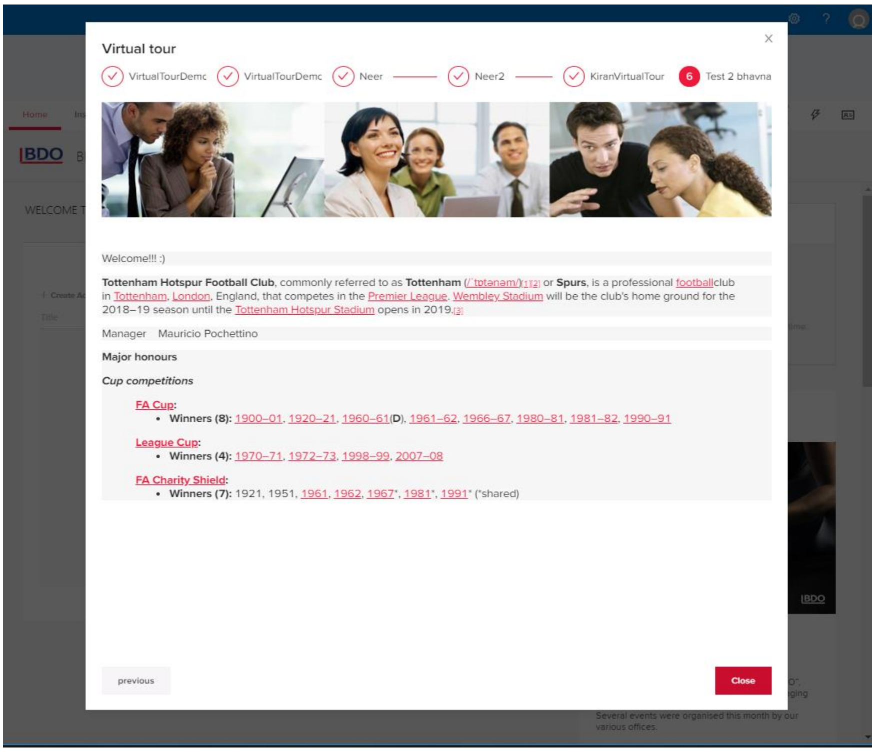
NOTES:

1. *Unless the user presses "Don't show again" or the user finishes all Coaching steps and presses "Complete", the Coaching session will pop up every time the user logs in to the Client Portal or the user refreshes the page in his browser. Pressing "X" button on the right top corner of the Coaching window will close the Coaching session temporarily – until next page reload or next log in.*

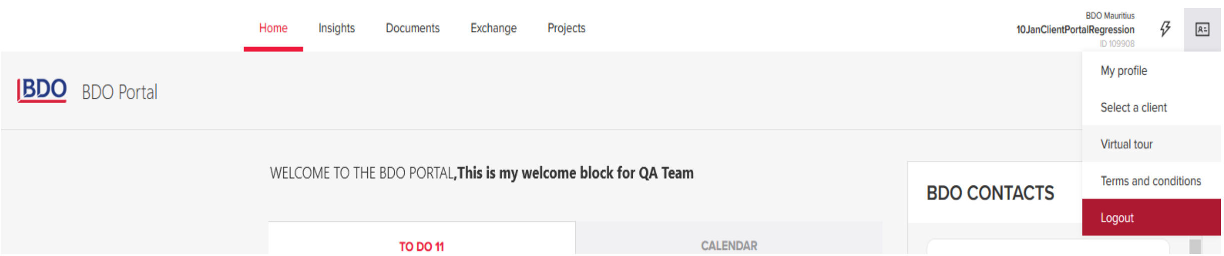
2. *The “Don’t show again” button will be not present in the “introduction” if the Coaching session was completed or closed with the “Don’t show again” button and later the Coaching session is initiated again by the user via top menu.*
3. *If the user is added to only 1 Client portal, first coaching step “Global navigation” will be skipped for this user as he doesn’t have any other Client portal to switch to.*
4. *The Coaching session is disabled for mobile view: coaching is not in the menu, and it is not active. Mobile view starts with 576px and less.*

3.3.6 Virtual tour

The Virtual tour will load upon a user’s initial login to the BDO Global Portal. The Virtual Tour presents information on how to use the BDO Global Portal.



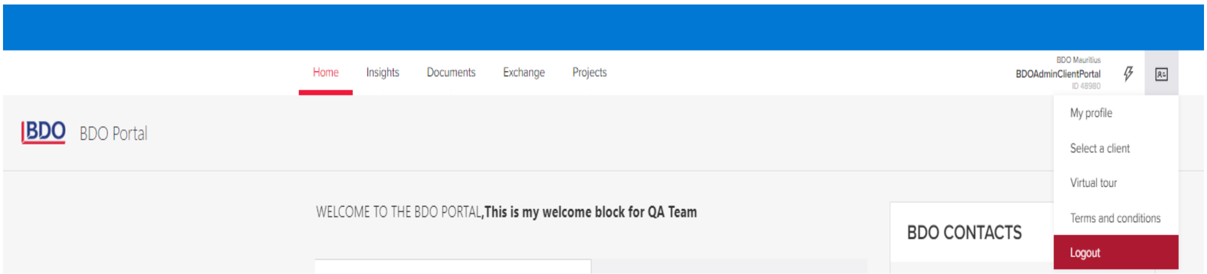
The same Virtual tour can also be accessed later by selecting ‘Virtual tour’ in the ‘Portal Menu’ (located in top-right area of the screen).



3.3.7 General interface elements

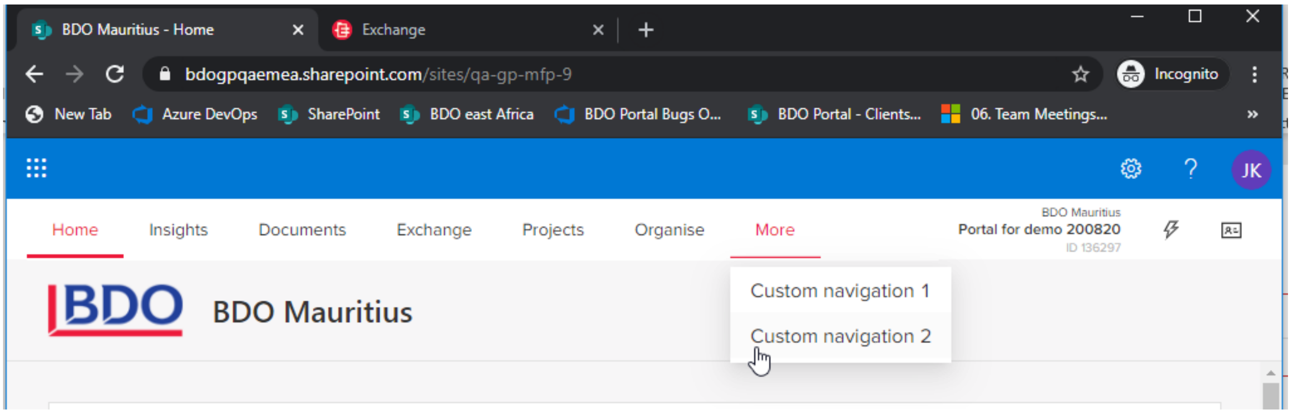
Selected Client Portal information

The BDO Firm name as well as name of currently selected Client Portal are presented in the portal header under the Portal menu in the right area of the header.



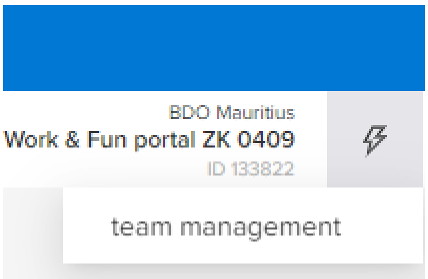
Top navigation menu

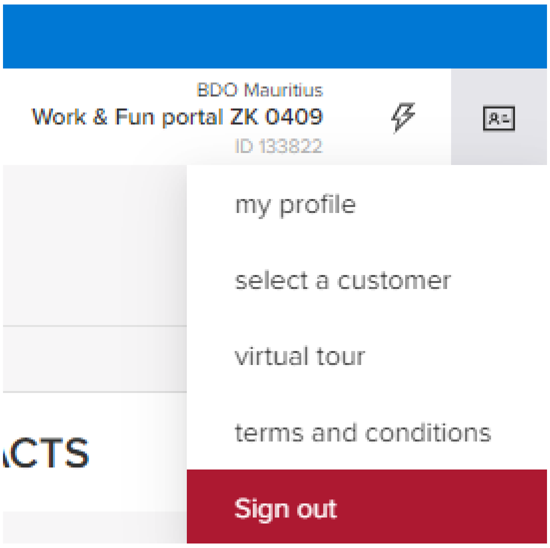
The navigation bar contains links to the various pages and applications present in the BDO Global Portal. Home, Insights, Exchange Next Gen and Documents are a default selection, however additional pages or links may be present.



Portal menus

Two portal menus can be found in the top-right side, the lightning bolt icon, provides team management information. The Contact Card icon provides administrative functions, as described above.

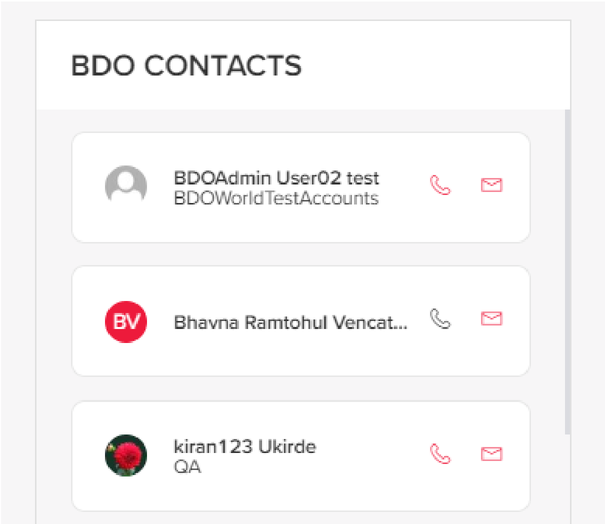




3.4 HOME PAGE

3.4.1 BDO Contacts

Your BDO Professional's contact information is displayed on the Home page. Select the icon to the right of the name to view your BDO Professional contact information, such as a phone number and email address.

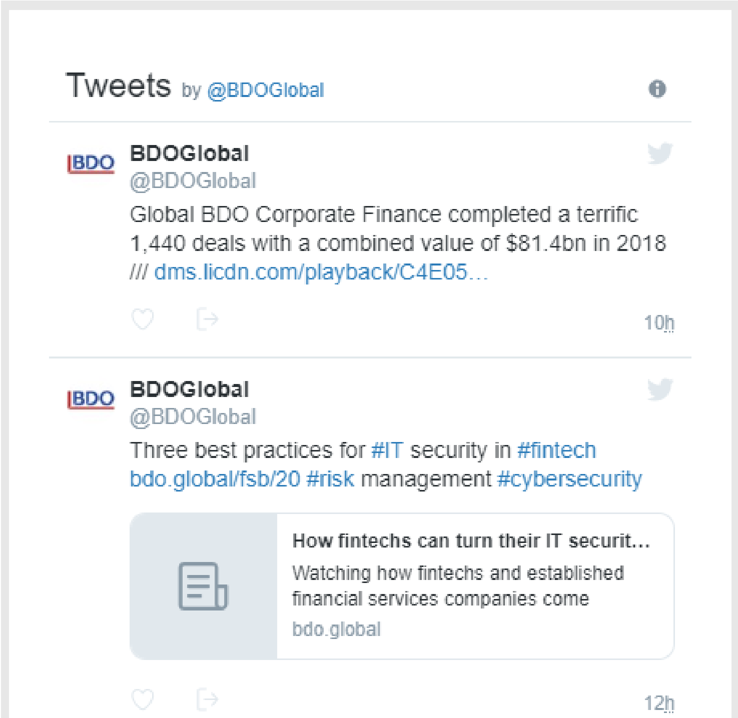


3.4.2 Insights

See the details outlined in the Insights block section of this guide.

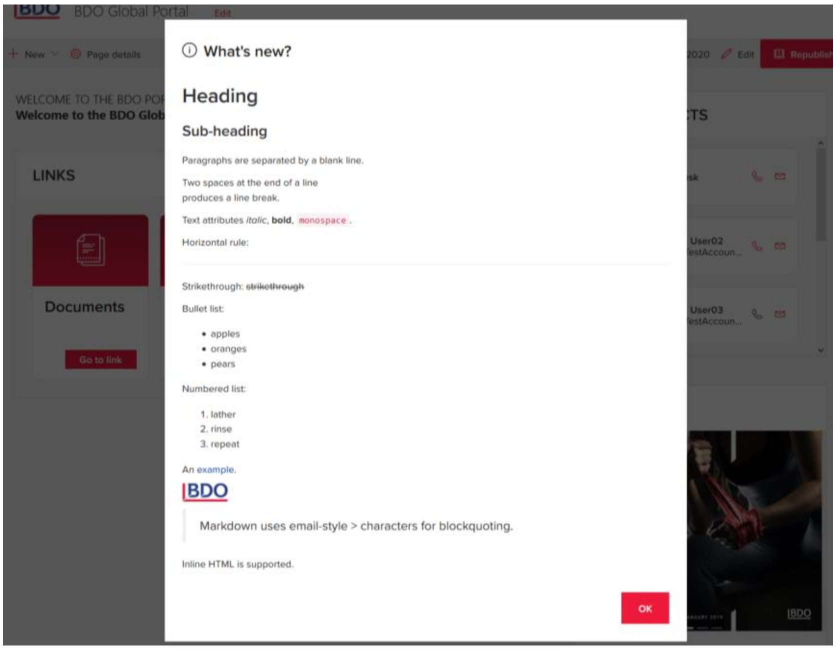
3.4.3 Twitter/Social Media

The Twitter or social media account may be presented on the Home page of the BDO Global Portal. This presents all users with BDO's latest social media posts.



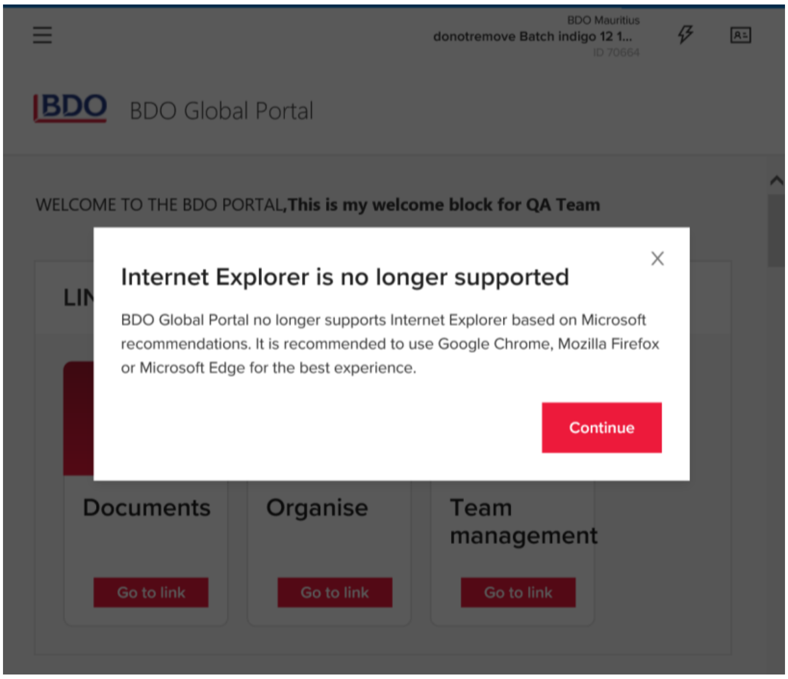
3.4.4 What's New message

The BDO Global Portal provides periodic updates. After an update is published, a message will be displayed to all users upon their first login following the release of the update.



3.4.5 Warning message if Internet Explorer is used

The Internet Explorer is no longer supported for the BDO Global Portal. If you log in by using the Internet Explorer, a warning message will appear. You can click "Continue" if you wish to proceed with using Internet Explorer.



3.5 MY PROFILE

Go back to the Release list

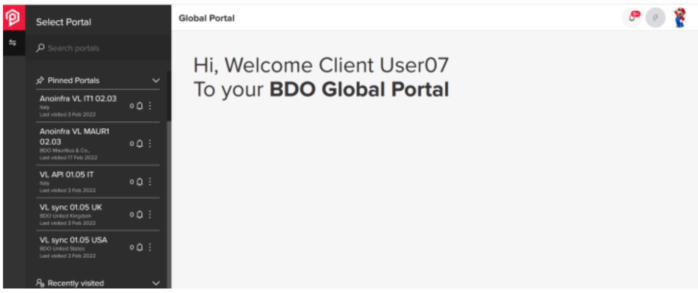
Personal settings (My profile and Notification preferences) will become Global settings. It means that the user will be able to access personal settings and select My profile and Notification preferences both from the Welcome screen (Client select page) and from the Portal.

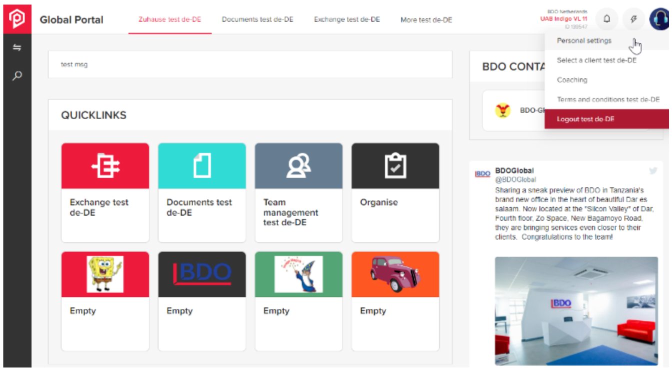
My profile is synchronised between MF and tenants, if the user is added into more the one MF or tenant. It means that each time a change is made in the profile settings, this information will be synchronised in all MFs and tenants where the user is added to. Personal settings that will synchronise within tenants are: Name, Last name, Title and Phone number.

Synchronisation between tenants will take some time, approximately few hours, on the other hand synchronization in one tenant will take few moments.

Users profile picture and mobile phone number will not synchronise within tenants, due to Client application permission limitations. This means that users will have to update each tenant with their picture and mobile phone number.

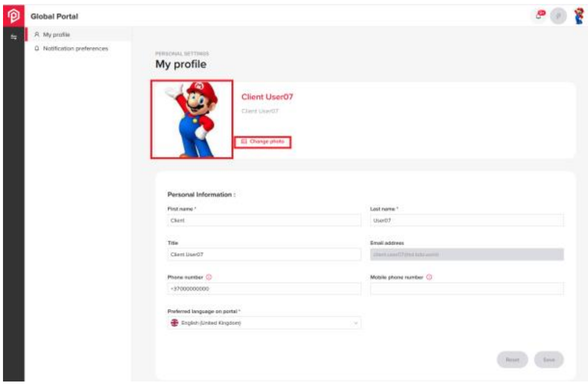
When the user clicks on profile icon in the top right corner, Personal settings and Logout selections is available in the drop down.





User can change their photo by clicking on "Edit profile picture" or hovering over the photo and clicking on it. Users can upload a profile picture (validate the size and accepted file types:

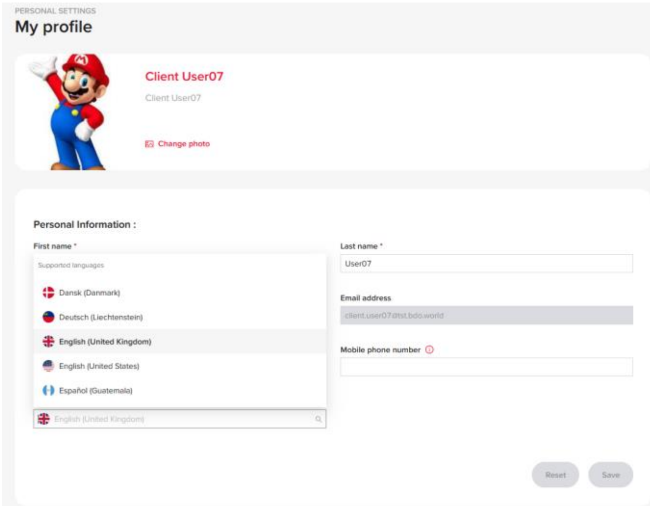
Type: BMP, JPEG, or PNG Size: 1MB advised - 4.76MB max.). Drag and drop is supported. It is possibility to remove image added:



3.5.1 Preferred language in the BDO Global Portal

Go back to the Release list

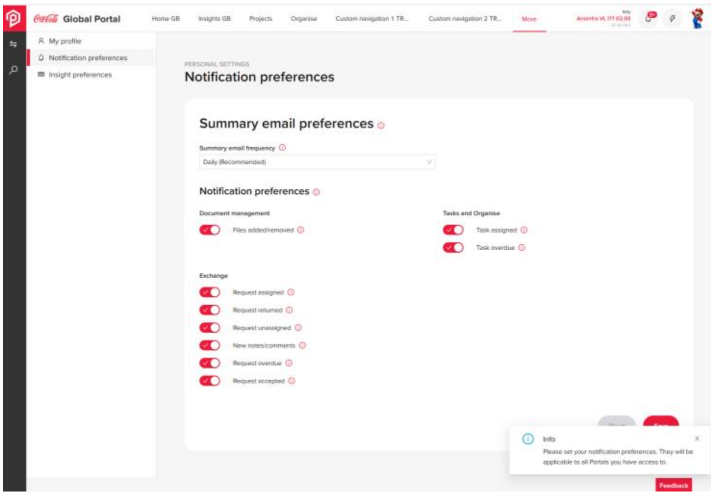
Default MF's language will be used in the Welcome page unless the user sets preferred language, that can be selected from a list of available languages: Supported and Not supported language list is provided while selecting a language in Portal side settings. Supported means that MF has translations already made for these languages. The list of supported languages is available through drop-down function.



Go back to the Release list

3.5.2 Notification preferences

The Client users will see these categories: Document management, Tasks and Exchange Next Gen, Exchange Classic.



<u>Important</u>: The grey toggle indicates that the notifications are Off, and the Red toggle indicates that the notifications are On.

All notification preferences toggles are depending on the Member Firm setting "Client userNotificationsEnabledByDefault", which is running for all BDO users, who did not make any changes to their notification preferences.

If this setting is set to "ON", all notification toggles are "ON" and email summary interval is set to "Daily" by default.
If this setting is set to "OFF", all notification toggles are "OFF" and email summary interval is set to "None" by default.

On the very first time when a user logs into Portal, they will receive a info message that they should set notification preferences manually. Warning message, "Please set your notification preferences. They will be applicable to all Portals you have access to." is displayed when Notifications preferences are opened in the bottom right corner and are displayed for few seconds only. The message can be closed manually.

The Notification preferences are set globally and will appear across all Portals and MFs. Changes made to already set preferences will be applied globally too. Notification preferences options stays the same without any changes. Reset button is enabled only if there were changes made. After clicking Reset, all changes are reverted.

The Client user can choose which event he wants to be notified about. He can disable/enable toggle button next to the preferences. Once any changes to toggles are made, the Save button is activated. If the user is happy with the changes he clicks Save to save the preferences. Success message is displayed at the bottom right corner.

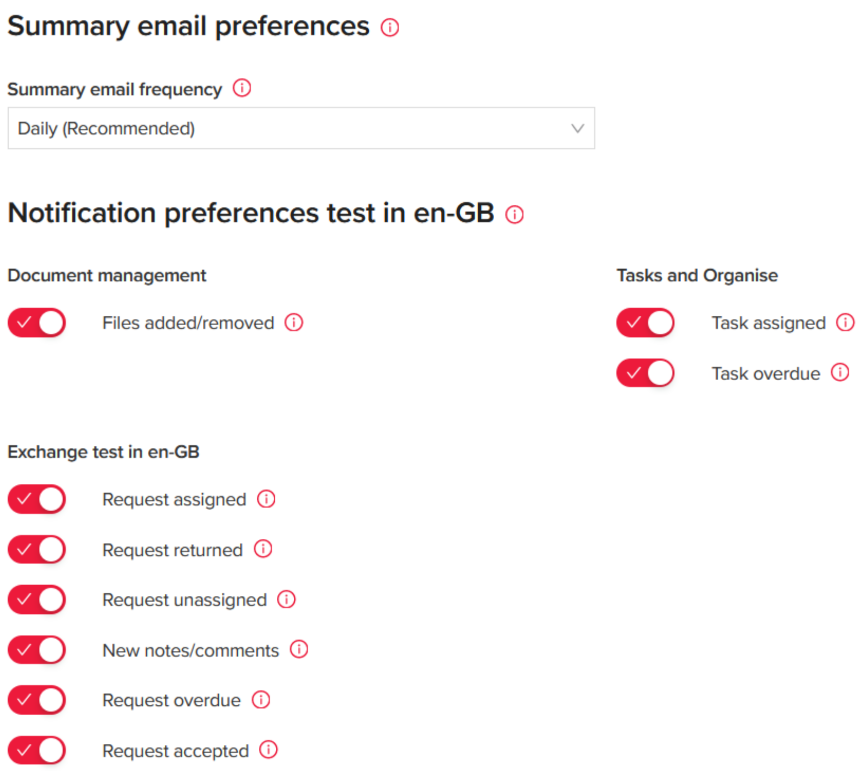
Pressing the Cancel button will disregard any changes done.

If the user had done some changes to the preferences and then without saving decided to navigate away from notification preferences page, a warning message is displayed.

If the user has the Exchange Classic or DocuSign disabled, toggles are still displayed for the Exchange Classic and Tasks notifications.

If the user has not yet edited his notification preferences, the settings will be controlled by a Member Firm wide setting. They can either be disabled or all enabled with the notification summary email set to Daily. If the user edits any of his notification preferences his settings become customised.

The user can modify the interval for receiving Notification Summary Email in the "Summary email frequency" dropdown.

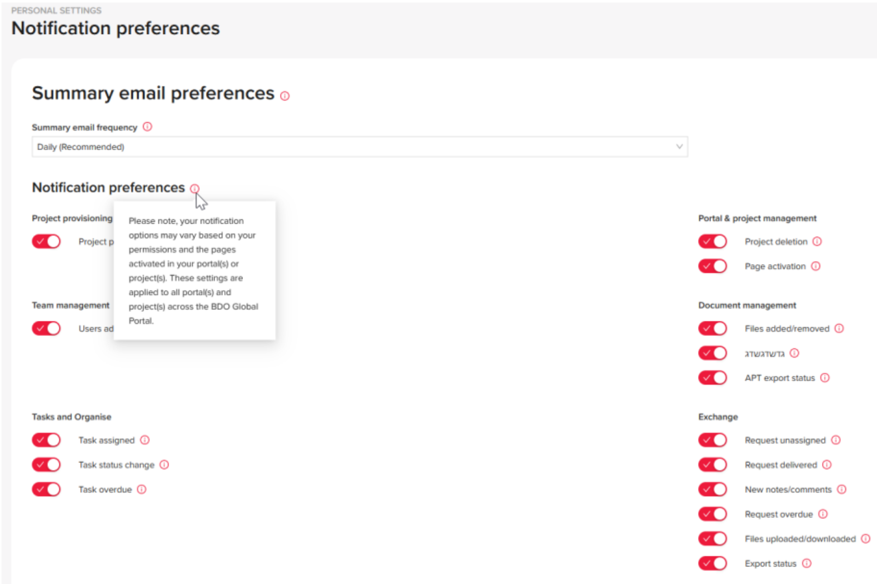


The Notification Summary Email The options present are:

- None – Disabled for the Member Firm
- Daily – The Recommended setting, email will start processing at 5 AM
- Weekly – Email will start processing at 5 AM on Mondays

If the notifications are enabled, the user is going to receive an aggregated notification summary email for every Portal the user has access to in the Member Firm within the selected time frame.

Under the BDO Global Portal Personal settings -> Notifications preferences tooltips were implemented. At the top/title of the page there is a tooltip explaining the different notifications options:



Please note, your notification options may vary based on your permissions and the pages activated in your portal(s) or project(s). These settings are applied to all portal(s) and project(s) across the BDO Global Portal.

Below the title are multiple toggles, where next to each there is a tooltip explaining which type of events trigger notifications and which users receive notifications if the toggle is set as ON.

Files added/removed

When a file is added/removed at the Client portal level, all BDO and Client users are notified. At the project level, all BDO and Client users invited to the project are notified.

Task Assigned

When a task is assigned in Exchange Next Gen, the user(s) that the task was assigned to are notified.

Task Overdue

When a task is due within 2 days, becomes overdue or is up to 3 days overdue at either the Client portal or project level, all BDO and Client users invited to that portal/project are notified.

Exchange Classic:

Request assigned

When a request item is assigned in Exchange Classic the Client user assignee is notified.

Request returned

When a request item is returned by BDO, all Client users with access to the project and request item are notified.

Request unassigned

When a request item has been unassigned, all BDO users and all Client users with access to the project and request item are notified.

New notes/comments

When a new note of comment is added by any user, all BDO users and all Client users with access to the project and request item are notified.

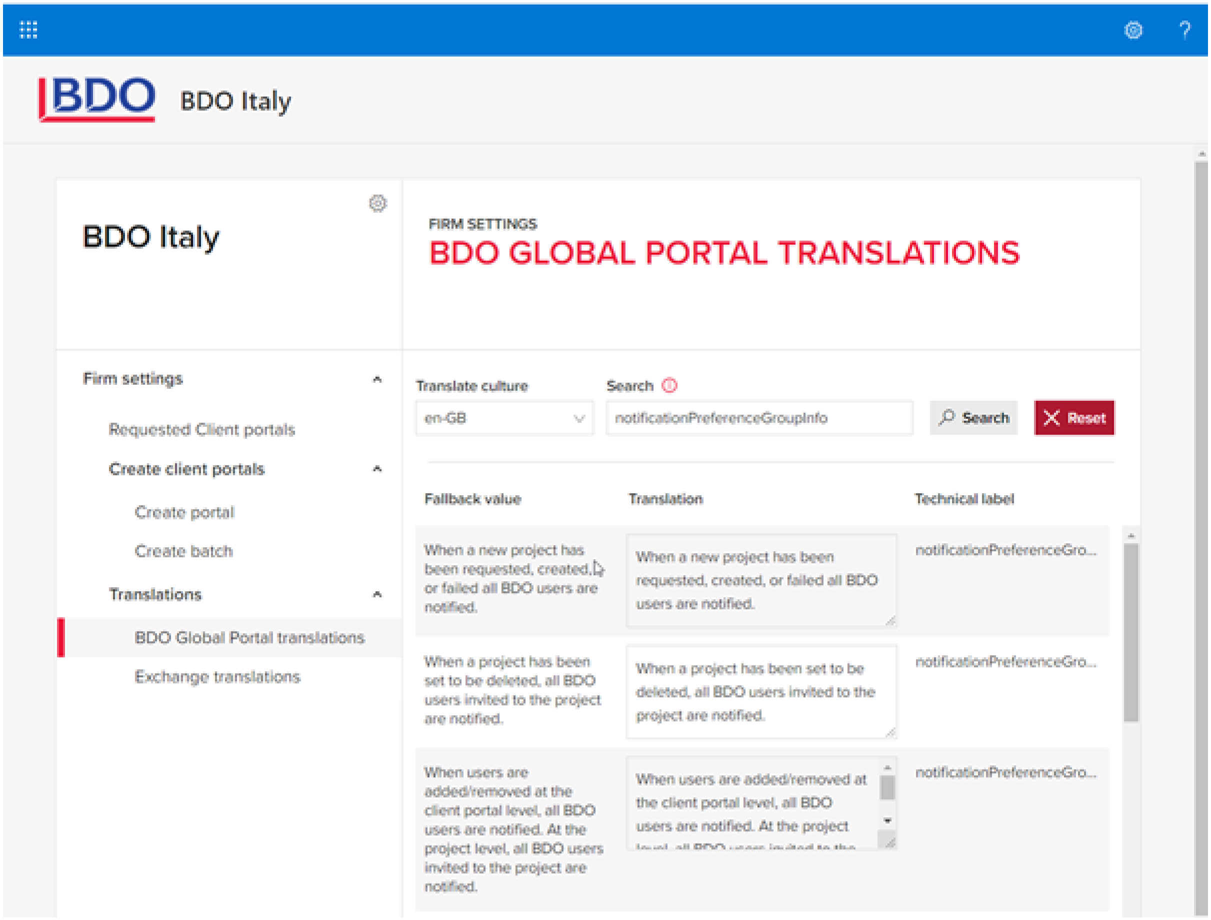
Request overdue

When a request item is due within 2 days, becomes overdue or is up to 3 days overdue, all BDO and all Client users with access to the project and request item are notified.

Request accepted

When a request item is accepted by BDO, all Client users with access to the project and request item are notified.

All mentioned notification tooltips can be translated in Admin Toolkit > Firm settings > Translations > BDO Global Portal translations with the technical label including „notificationPreferenceGroupInfo“.



3.5.3 Insight Preferences

The user can toggle on and off any type of insight sub-categories he wants to see in his Insights page.

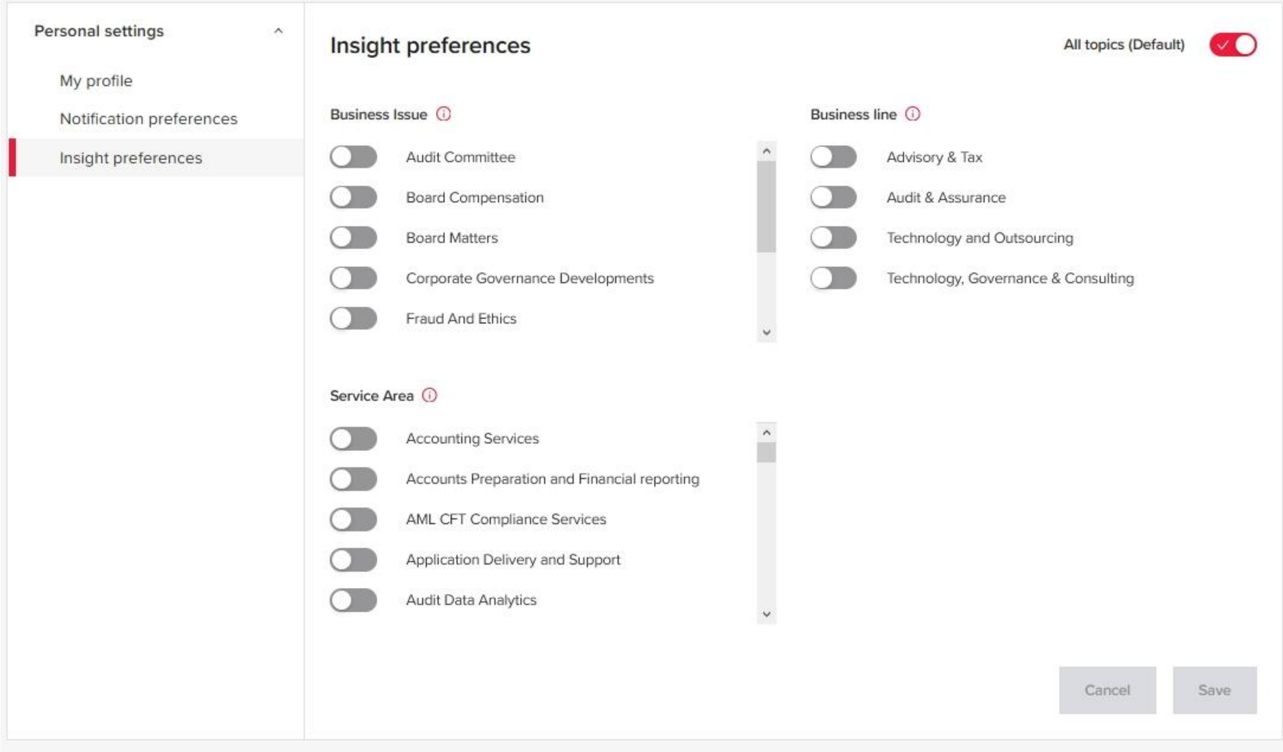


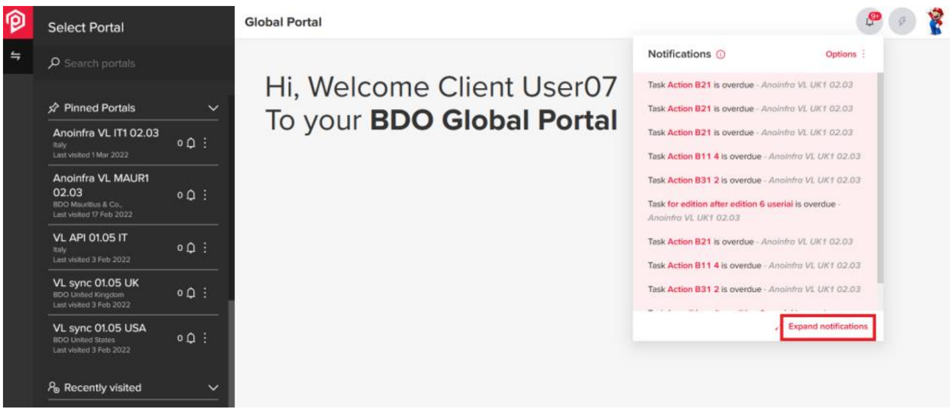
Image 1. Client employee Insights preferences

He can also choose to see all the newest insights by choosing "Default" in the top right corner.
Read more about Insights here: MY INSIGHTSERROR! REFERENCE SOURCE NOT FOUND.

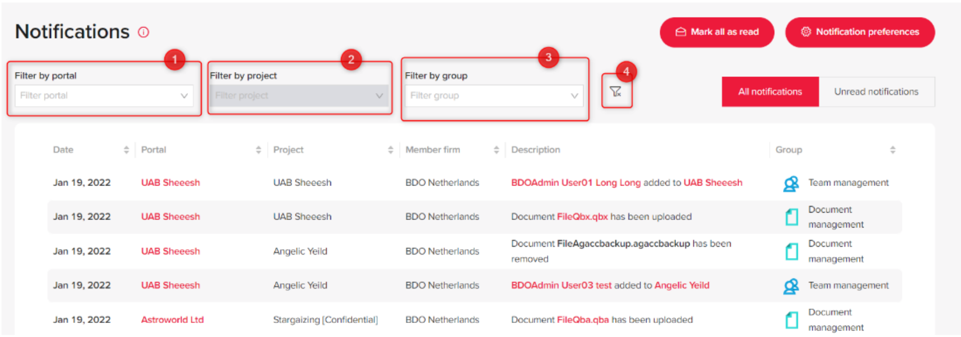
Go back to the Release list

3.5.4 Notification Log

The user logs in to a Client Portal, clicks the notification bell in the top right part of the tool ribbon and chooses "Expand notification" to be navigated to the Notification Log. Starting with Release 4.6, notification log is applied globally and synchronised across all user's firms.



Notifications can be filtered by results listed according to the selected filter, by Portal[1], Project[2] and Group[3]. These filters can be removed individually or at the same time by pressing the Clear filters[4] button.



Starting from R4.6 New notifications will be displayed as unread for 7 calendar days. After 7 days notifications are displayed as read both when clicking on a notification bell, and in notification (log) page. this will impact filtering in the notification log when user sets to "Unread notifications".

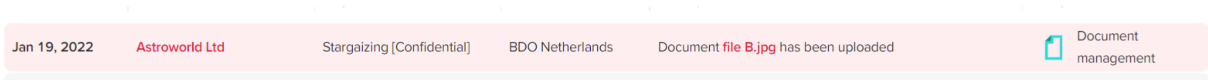
The notifications are stored for 30 days before being deleted. The default sorting for notifications is by date in descending order with unread notifications on top.

The Group filter consists of:

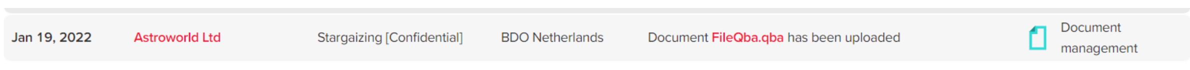
1. Provisioning;
2. Portal & Project Management;
3. Team Management;
4. Documents;
5. Exchange Next Gen;
6. Exchange Classic;

The Notifications have 2 stages: unread and read. The Unread notifications are being highlighted with a translucent red.

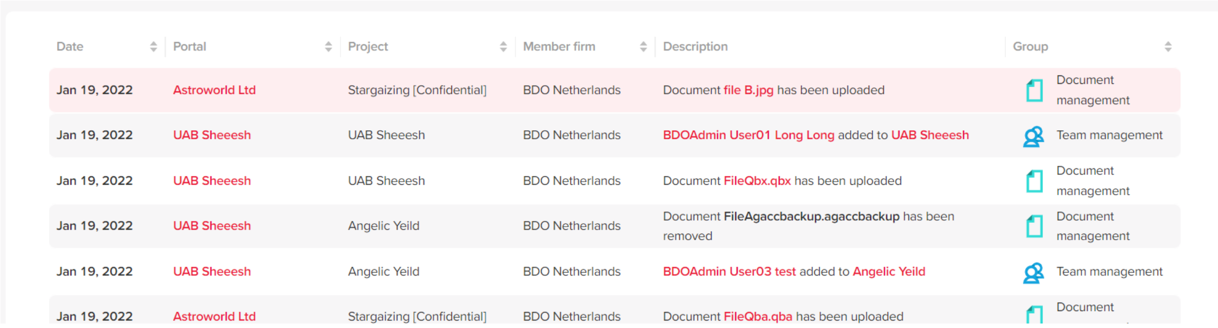
Unread notification:



Read Message:



Each notification has a:
Date - date format MMM. D, YYYY (“Sep. 4, 1986”).
Description - a short and informative description about the nature of the notification.
Group - from which event group the notification is from (“Documents, Exchange Next Gen, etc.”).
Location - the location (Project/Portal) from which the notification originates.



Date	Portal	Project	Member firm	Description	Group
Jan 19, 2022	Astroworld Ltd	Stargaizing [Confidential]	BDO Netherlands	Document file B.jpg has been uploaded	Document management
Jan 19, 2022	UAB Sheeesh	UAB Sheeesh	BDO Netherlands	BDOAdmin User01 Long Long added to UAB Sheeesh	Team management
Jan 19, 2022	UAB Sheeesh	UAB Sheeesh	BDO Netherlands	Document FileQbx.qbx has been uploaded	Document management
Jan 19, 2022	UAB Sheeesh	Angelic Yeild	BDO Netherlands	Document FileAgaccbackup.agaccbackup has been removed	Document management
Jan 19, 2022	UAB Sheeesh	Angelic Yeild	BDO Netherlands	BDOAdmin User03 test added to Angelic Yeild	Team management
Jan 19, 2022	Astroworld Ltd	Stargaizing [Confidential]	BDO Netherlands	Document FileQba.qba has been uploaded	Document

Additionally, some notifications have links to the event they are describing. By clicking on the notification, the user will be redirected to the specific action being notified about.

All notifications and links by Group:

1. Provisioning:
    a. Project Requested – links to the Portal & Project Management Page, specifically to the requested Project.
    b. New project notification - links to the Portal & Project Management Page, specifically to the new Project.
    c. Project Creation Failed - links to the Portal & Project Management Page, specifically to the Project that failed creation.
2. Portal & Project Management:
    a. Project was set to be deleted – links to the Portal & Project Management Page. If possible, specifically to the Project that was being deleted.
3. Team Management:
    a. User added to portal - links to the specific portal in Team management page.
    b. User added to project - links to the specific project in Team management page and/or to the specific project in Portal & Project management page.
    c. User removed from portal - links to the specific portal in Team management page.
    d. User removed from project - links to the specific project in Team management page and/or to the specific project in Portal & Project management page.
4. Documents:
    a. New portal document has been uploaded - links to the specific file that was uploaded in the Documents Page.
    b. Portal document has been removed – doesn't link anywhere.
    c. New project document has been uploaded - links to the specific file that was uploaded in the Documents Page.
    d. Project document has been removed - doesn't link anywhere.

e. Document was made read only on portal level - links to the specific file that was uploaded in the Documents Page.

f. Document was made read only on project level - links to the specific file that was uploaded in the Documents Page.

g. Portal document transfer to APT successful - links to the specific file that was uploaded in the Documents Page.

h. Portal document transfer to APT failed - links to the specific file that was uploaded in the Documents Page.

5. Exchange Next Gen:

    a. Task Assigned to me - links to the specific task in the Exchange Next Gen Page.

    b. Approval Task approved - links to the specific task in the Exchange Next Gen Page.

    c. Approval Task rejected - links to the specific task in the Exchange Next Gen Page.

    d. Signature Task signed - links to the specific task in the Exchange Next Gen Page.

    e. Signature Task declined - links to the specific task in the Exchange Next Gen Page.

    f. Action Task completed - links to the specific task in the Exchange Next Gen Page.

    g. Action Task rejected - links to the specific task in the Exchange Next Gen Page.

    h. Task due soon or overdue - links to the specific task in the Exchange Next Gen Page.

6. Exchange Classic:

    a. Request assigned to me - links to the specific Request Item in Exchange Classic.

    b. Request has been returned - links to the specific Request Item in Exchange Classic.

    c. Request has been unassigned - links to the specific Request Item in Exchange Classic.

    d. Request has been delivered - links to the specific Request Item in Exchange Classic.

    e. New note/comment - links to the specific Request Item in Exchange Classic.

    f. Request Overdue - links to the specific Request Item in Exchange Classic.

    g. Request has been accepted - links to the specific Request Item in Exchange Classic.

    h. Files added to Request - links to the specific Request Item in Exchange Classic.

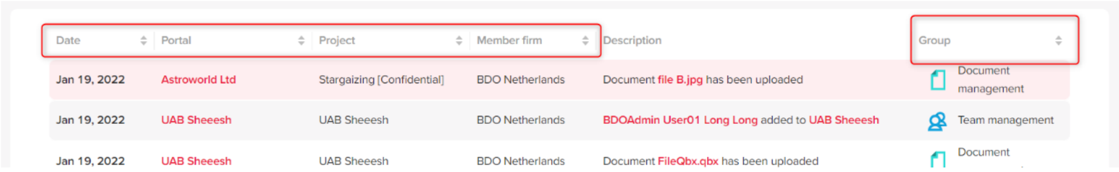
    i. Files downloaded - links to the specific Request Item in Exchange Classic.

    j. Exchange Classic document transfer to APT finished - links to the specific Request Item in Exchange Classic.

    k. Exchange Classic RI file transfer to APT failed - doesn't link anywhere.

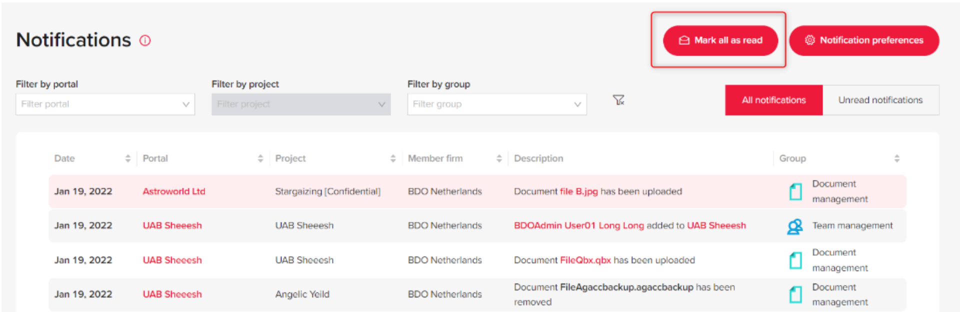
Notifications can be sorted by all those fields except for the description. By clicking on (Date; Group; Location;) it will sort by that filter descending, and if clicked again, ascending order.

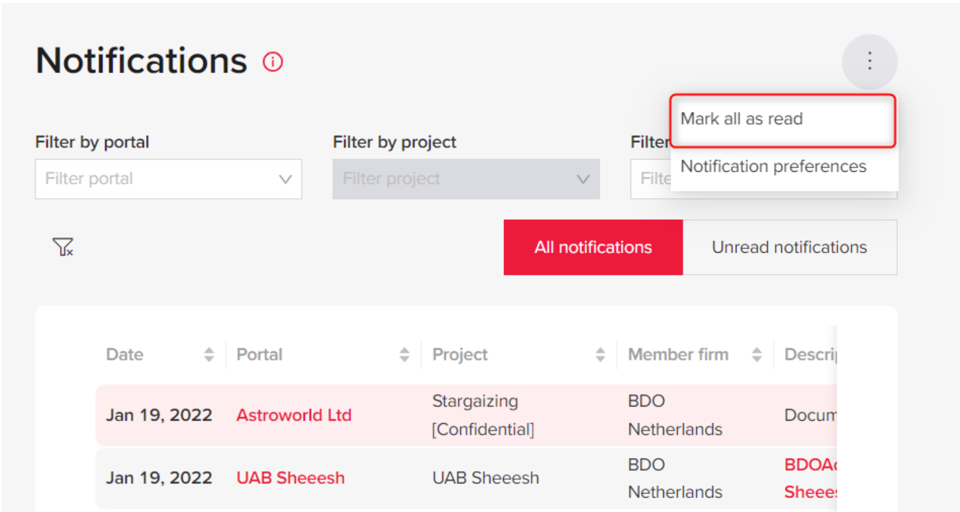
Notifications can be sorted by all fields except for the description. By clicking on the Date, Group or Location the notifications will be sorted in descending order, clicked again, in the ascending order.



The Notification Log has paging of 10 notifications per page. To navigate the pages, use the numbering and navigation arrows at the bottom right corner of the screen.

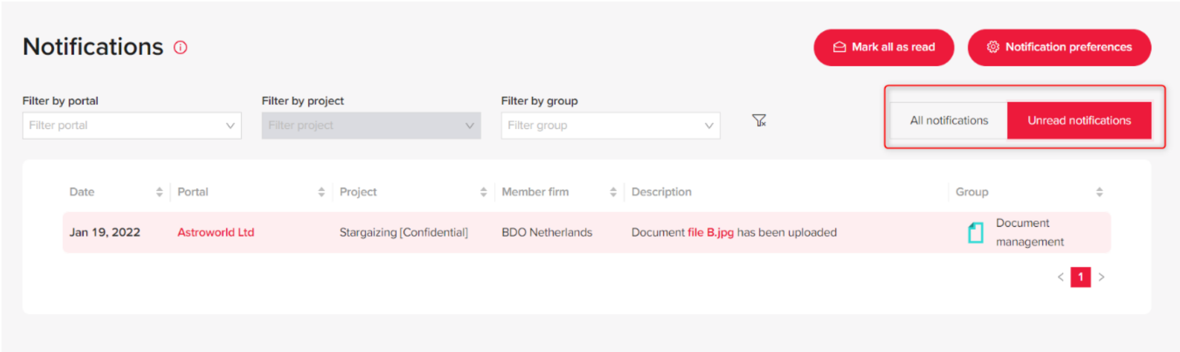
Users can mark all notifications as read, disregarding the filter. By clicking the red button “Mark all as read” or, if the screen is smaller or equal to 1024px, by pressing the three dots above the right corner of the notifications and selecting “Mark all as read”.





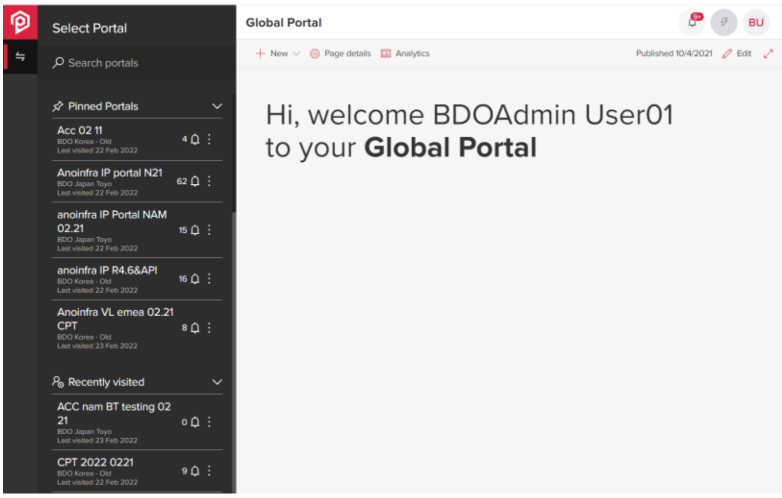
Lastly, the user can press the Notification preferences button or the three dots menu choosing Notification preferences, to be navigated to the global notification preferences page.

The user can also easily sort notifications to only show all unread notifications by choosing the Unread notifications switch.



NOTE: the "overdue" notifications are being sent every day for all the not completed tasks during this period: 2 or less days left to the due date - no more than 30 days passed after the due date of the task (32 days period in total).

Any users who have access to Portals/Projects, can view the notification count in the Client select screen. User logs in to the Global Portal and notices that in the Black sidebar Client Portals, to which the user is added to, are listed out. On the right side of each Client Portal is a bell icon showing exact number of unread notifications per Client Portal.

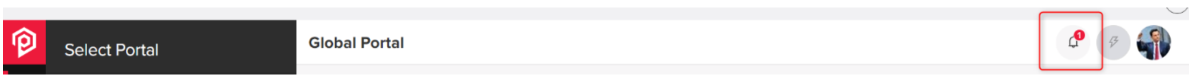


Go back to the Release list

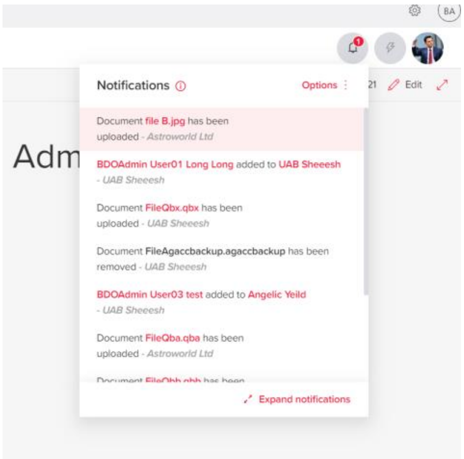
3.5.5 Notification Bell

User logs in to a Client Portal, clicks the notification bell in the top right part of the tool ribbon to open the window to check the newest notifications.

As of Release 4.6, notification Bell is applied globally and synchronized across all user's firms. It can now be accessed at the landing page.



Once clicked a modal window opens.



This window shows the newest (by origin date) 10 notifications the user has filtered for this Portal and its Projects.

The sorting is like the default sorting mode in the notification log. It is sorted by unread messages first, by date descending, followed by read notifications by date descending.

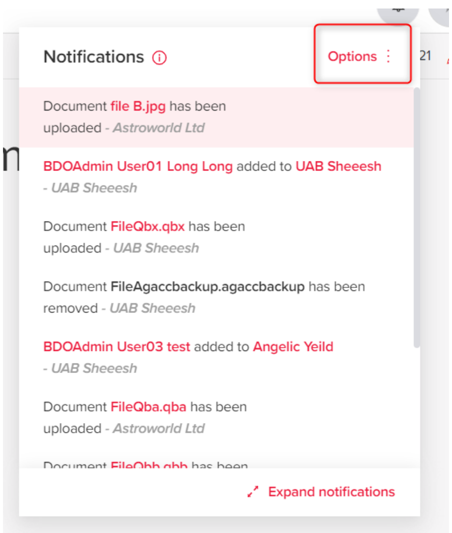
The notification bell shows a preview number of how many unread notifications the user has in a small red bubble in the corner of the notification bell.

Just like in the notification log, an unread message can be marked as read by clicking on the body of the notification or any of the links associated with the notification.

Links, like in the log, will redirect the user to the exact location the event took place (a document, task, etc.)

Additionally, the modal window has shortcuts to navigate to the notification log or its settings page.

By clicking the three dots in the upper right corner of the modal window, a drop down with multiple selections will appear.



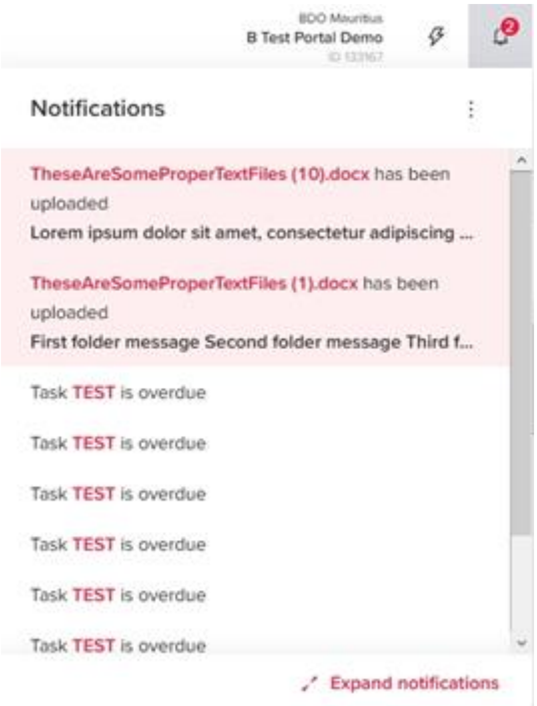
The first selection will mark all of the notifications in the Portal and its Projects as read.
The second selection will redirect the user to the notification log settings.
And the last selection will redirect the user to the full notification log.

The “Expand notifications” button at the bottom right corner of the modal window, which also redirects the user to the full notification log.

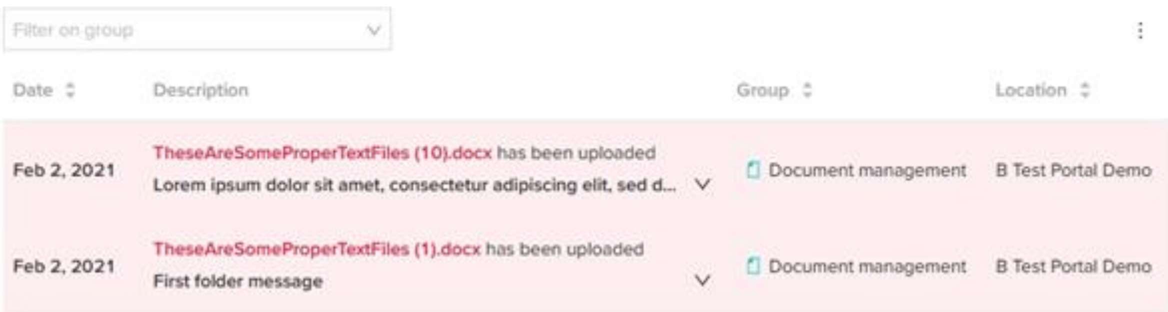
The notifications update on page re/loading and clicking on the notification bell.

3.5.6 Custom Folder Message Notifications

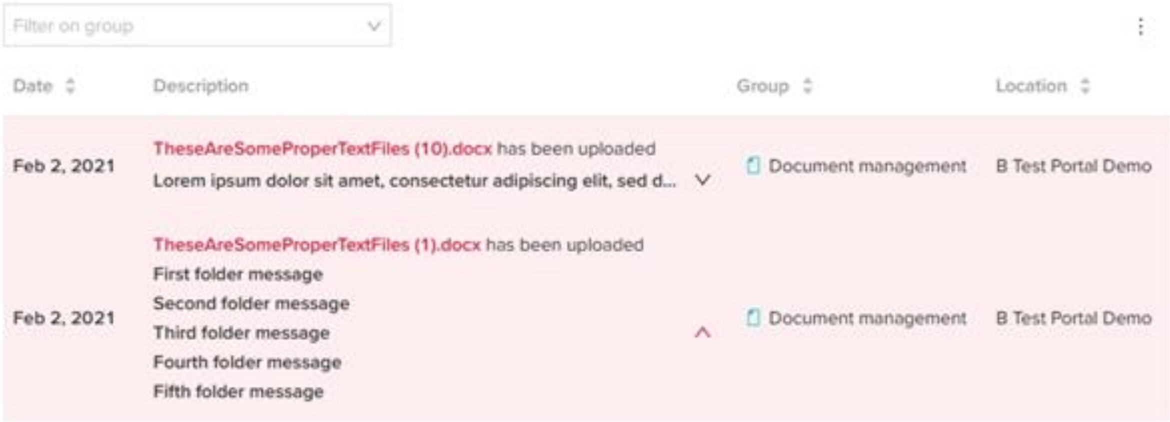
User logs in to a Client Portal, uploads a file to a folder that has a custom folder notification set. After a successful upload, the user receives a notification. In the Notification Bell the first custom folder message is displayed in a new line, followed by three dots if it is too long.

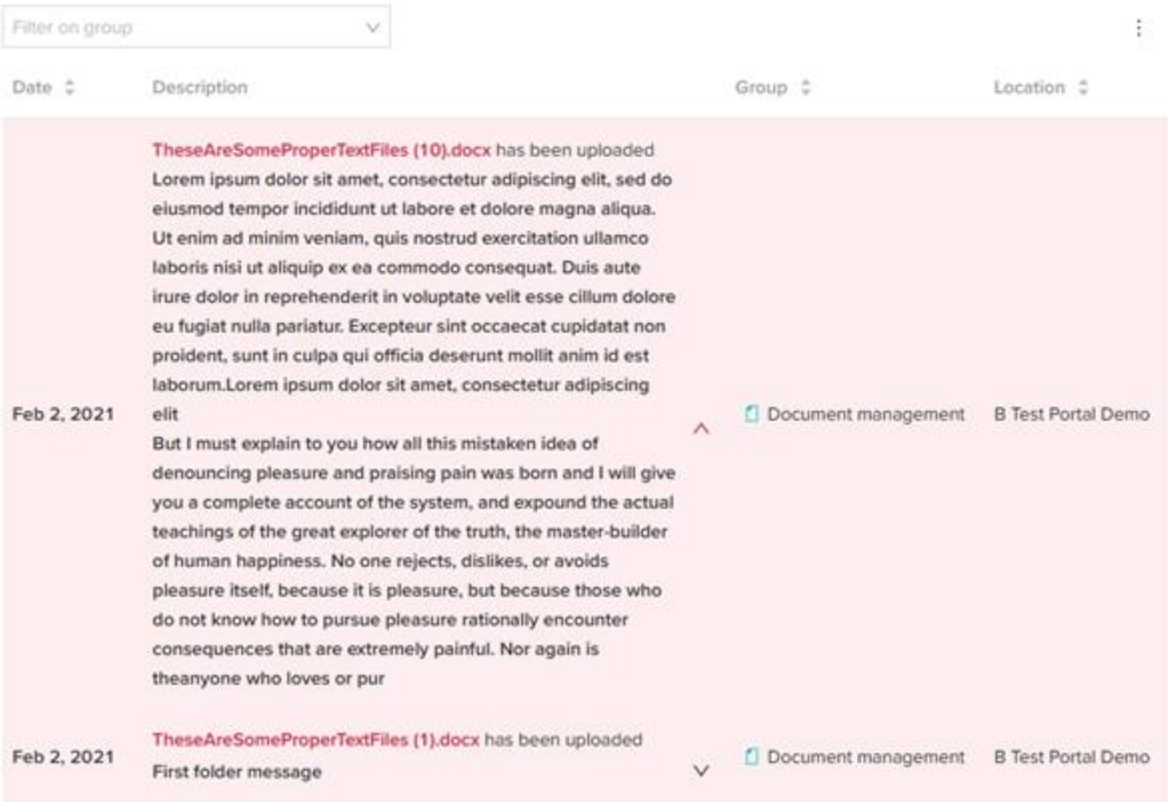


In the Notification Log it is going to be displayed the same as in the notification bell.



It can also be expanded to show the full message or contracted again to show the original notification. Each custom folder message will be in a new line.



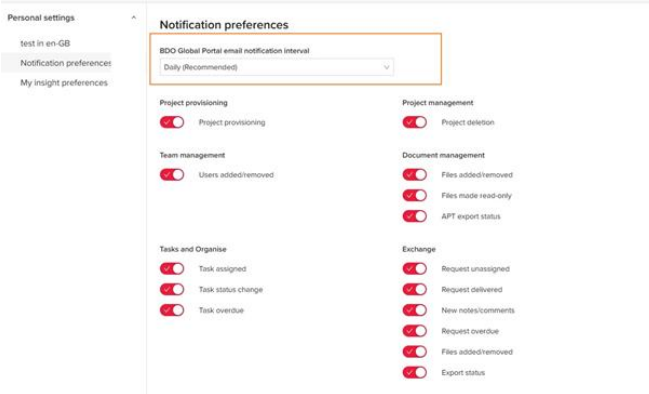


Go back to the Release list

3.5.7 Notification Summary Email

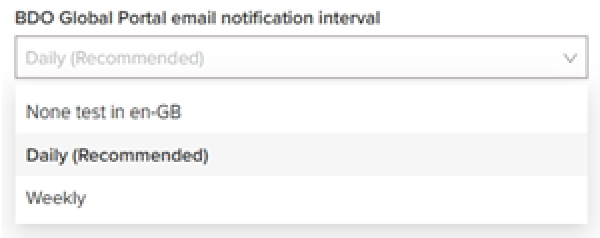
Starting from R4.6 User will receive a Summary email (Daily and Weekly) about unread notifications that are not expired – 7 and less days old (older than 7 calendar days unread notifications are set as read). Summary emails are generated on a Member Firm level, as it is now.

The unsubscribe link at the bottom of the Summary email is enabled. And the User is redirected to the Portal log in page. After logging in, the summary email frequency and other notification preferences can be changed in the Notifications preferences page.



The options present are:

- None – Disabled for the Member Firm
- Daily – The Recommended setting, email will start processing at 5 AM
- Weekly – Email will start processing at 5 AM on Mondays



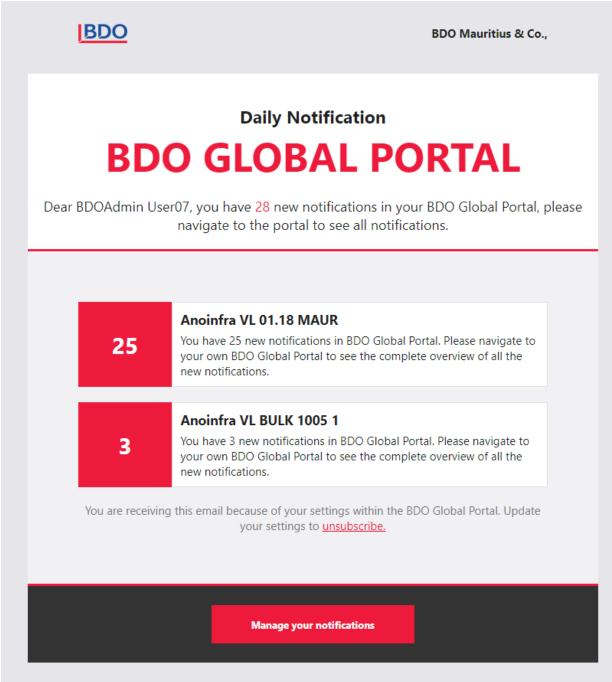
If it is enabled, the user is going to receive an aggregated notification summary email for every Portal the user has access to in the Member Firm within the selected time frame.

The email contains:

1. BDO Logo
2. Member Firm name
3. Type of notification email (Daily, Weekly)
4. An accurate description and a bubble with the number of the unread notification count in the Member firm for that user
5. A list of Portals the user has access to
    a. With a description, number of unread notifications for the Portal the user has

Additionally, there is a text box beneath all Portal list with a hyperlink, to quickly unsubscribe form the Global notification summary email. User is redirected to the Portal log in page and after logging in to the notification preferences page, where they can change Summary email frequency and other notification preferences.

6. At the bottom of the email there is a link to the Manage your notifications instead of “Go to BDO Global Portal”. When User clicks on "Manage your notifications" in Summary email, user is navigated to the portal log in page. After login, user is navigated to the Global notification list (log) page, where the user can read, or mark as read all of their notifications.



3.5.8 Stopped and Remaining Emails

The new portal notifications replaced some of the old email notifications. Below are the list of the emails that will be sent as before and there is a list of the emails that won't be sent anymore.

Users will continue to receive these email notifications:

1. Quality Check Request.
2. Quality Check Rejected.
3. New Portal Notification.
4. Portal Creation Failed Notification.
5. Delayed Provisioning Notification.
6. Failed Client Portal Request Removed Notification.
7. Portal Deletion Notification.
8. Task Deletion Notification.
9. Bulk Creation Failed Notification.
10. Bulk Creation Success Notification.
11. New Client user invitation email.
12. Re-send invitation email for new Client user.

Users will stop receiving these email notifications:

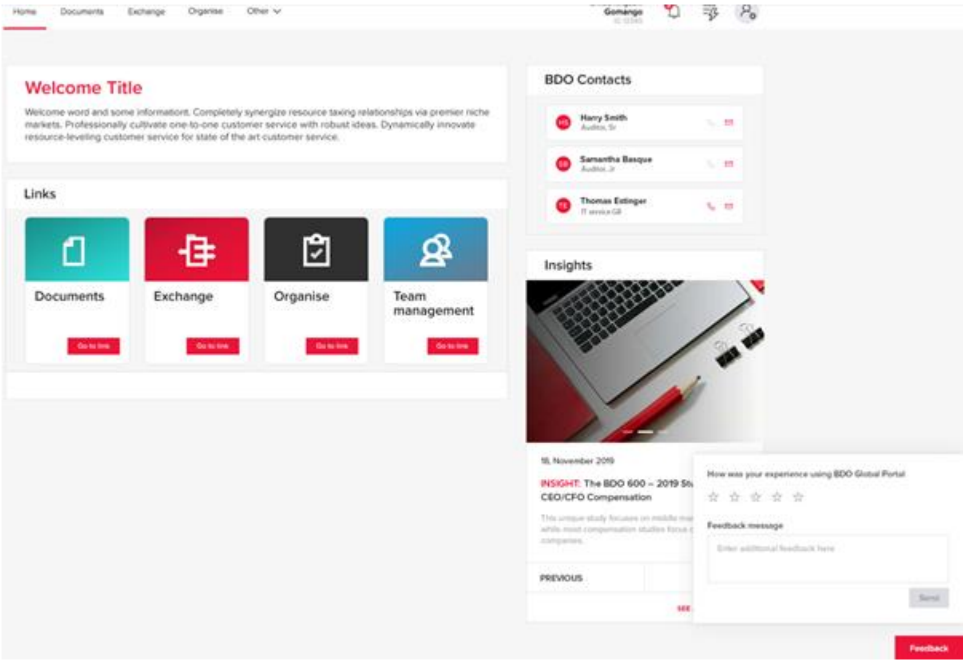
1. Project Request.
2. New Project.
3. Project Creation Failed.
4. Project was set to Deletion.
5. New Document have been uploaded to Member firm.
6. Document have been removed from Member firm.
7. Task Assigned.
8. Request Approval Update.
9. Request Signature Update.
10. Actions have been completed.
11. Daily Digest mail.
12. Weekly digest mail.
13. Document export to APT status email.

3.6 FEEDBACK

In order to improve users' experience a new feedback feature was added - a feedback, which can be shared on all Portal pages (except the Exchange Classic page). The feedback automatically adds the page value of the page the feedback was triggered from.

When users log into the BDO Global Portal, they see a new red "Feedback" button on the bottom right corner of the window. Clicking on it will pop up the feedback window and the following will appear:

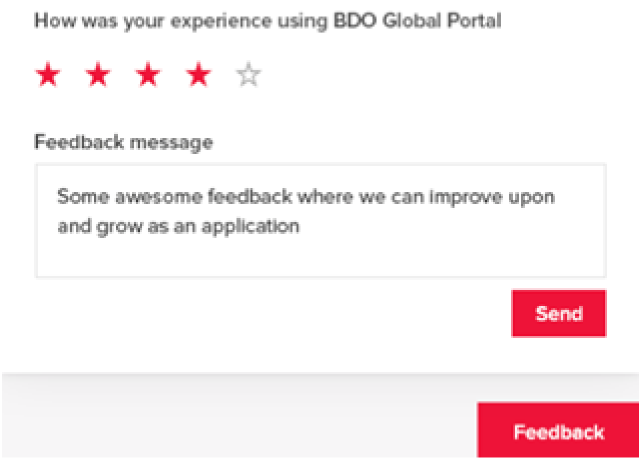
1. Label "How was your experience using BDO Global Portal",
2. 5 stars in one row, line color grey,
3. label "Feedback message",
4. Simple text input field,
5. Grey "Send" button.



Upon hovering over the star from the left, those will color in red. Selecting a star will color the star and all stars to the left in red. Stars on the right remain grey. Choosing another star will color this star and all from the left fully red, ones on the right remain grey.

The feedback message field allows up to 500 text characters. If the user tries to enter more than 500 characters, he will get a warning message. If the user tries to enter not simple text, such as images, gifs, etc., he receives a warning message.

To activate the “Send” button at least one star must be selected. After selecting stars and writing the feedback message the “Send” button becomes active (color changes from grey to red).



Once pressing the “Send” button, a success message pops up next to the "Feedback" button. It automatically closes after 4.5 seconds or can be closed by pressing the “X” button.

When a user provides a feedback, message is sent to the Data base with this information:

1. userUPN,
2. timestamp,
3. Client Portal page,
4. star rating,

5. Comment.

The user can send the feedback as many times and as often as they want.

3.7 DOCUMENT MANAGEMENT

The BDO Global Portal users can upload files or folders so that they can store documents in a project. Users who can manage and upload to the project level are:

a. Client project user and Client project admin

Users with read only access to documents are:

a. Client project reader

In addition, users with the read only access can't see other users deleted files in the recycle bin.

3.7.1 Document Upload

A User can upload documents or folders by going to the Documents page, select a project (depending on user permissions) and click on 'Add' -> 'Upload files'/'Upload folder' or Drag and Drop the documents/folders.

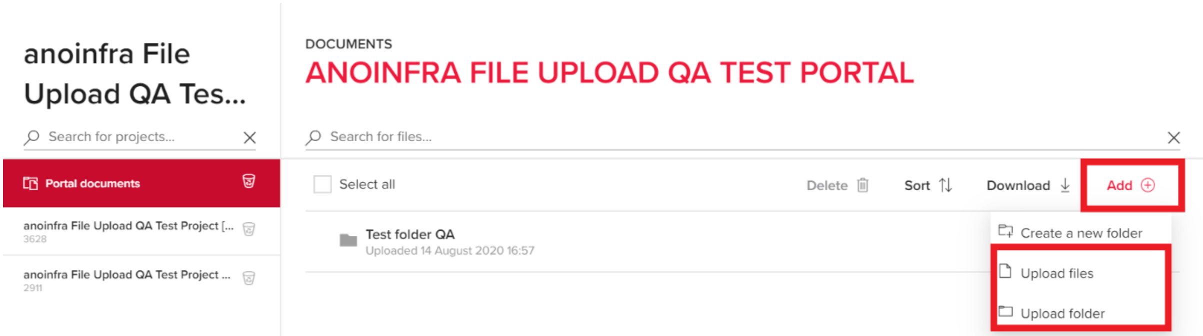
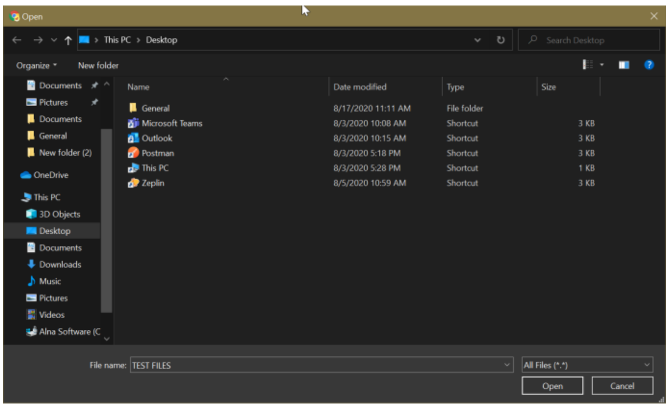
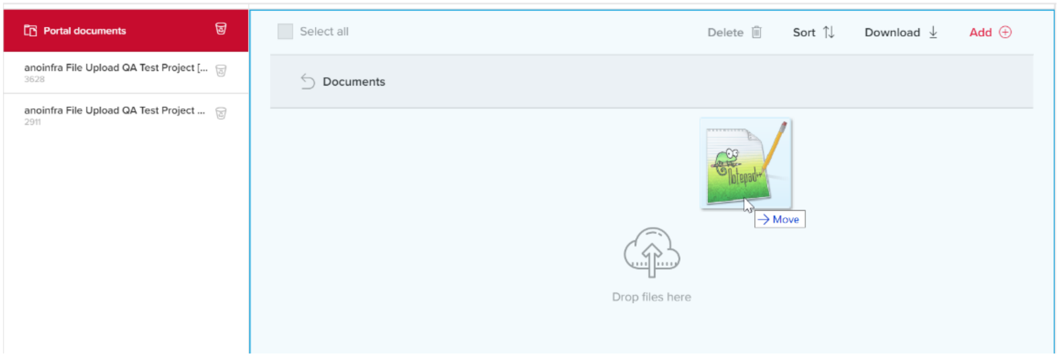


Image 1. Document upload

"Choose from file directory" pop-up window appears.





New Folder in the desired directory can be created.

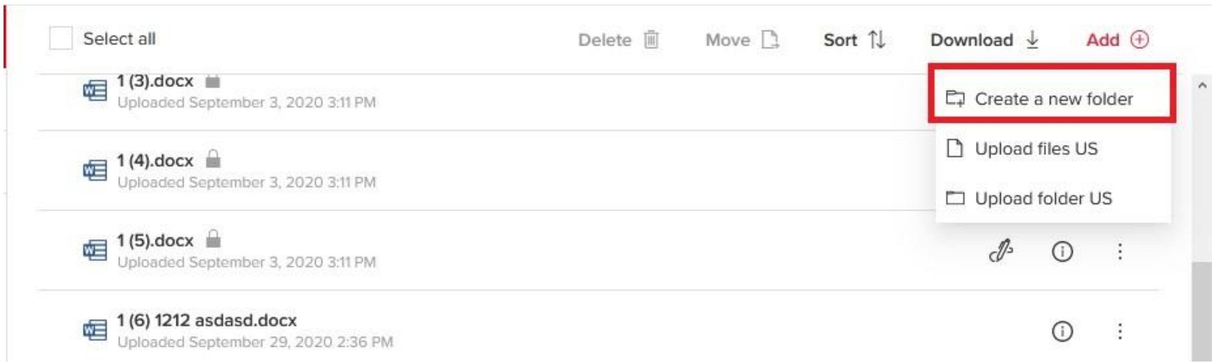
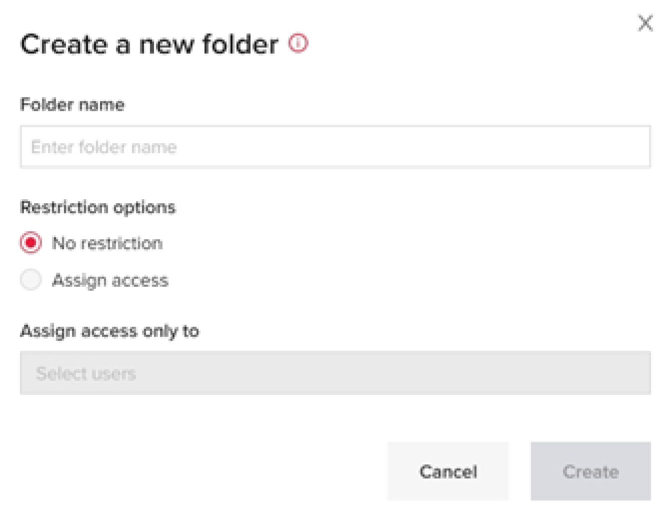


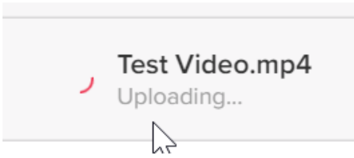
Image 4. Creating new folder

Access to the folder can be managed straight away.



It is possible to upload a single or multiple documents. The only exception is, that through “Choose from file directory”, you only can upload a single folder.

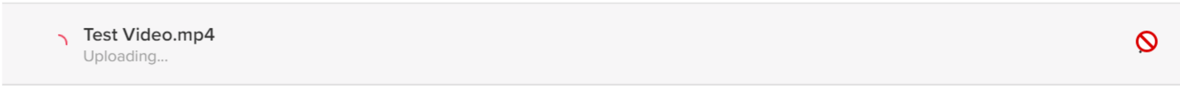
During the upload a spinning wheel is displayed.



Followed by a notification for a successful upload.

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.



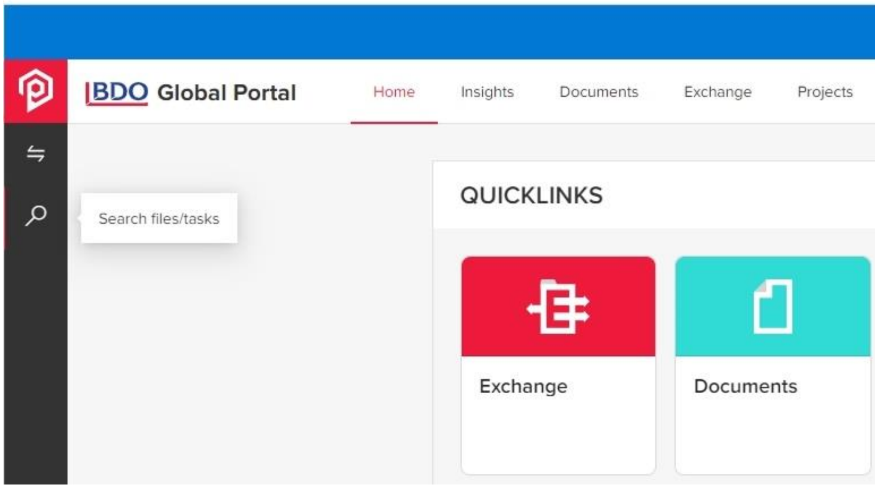
The editing options only appear after the file or folder is uploaded.

3.7.2 Search

You can search for specific a file. The search functionality works by search the file the title contain the search term in any part of the file. Only files can be searched for, folders don't appear in the search results. You can sort the document list after searching.

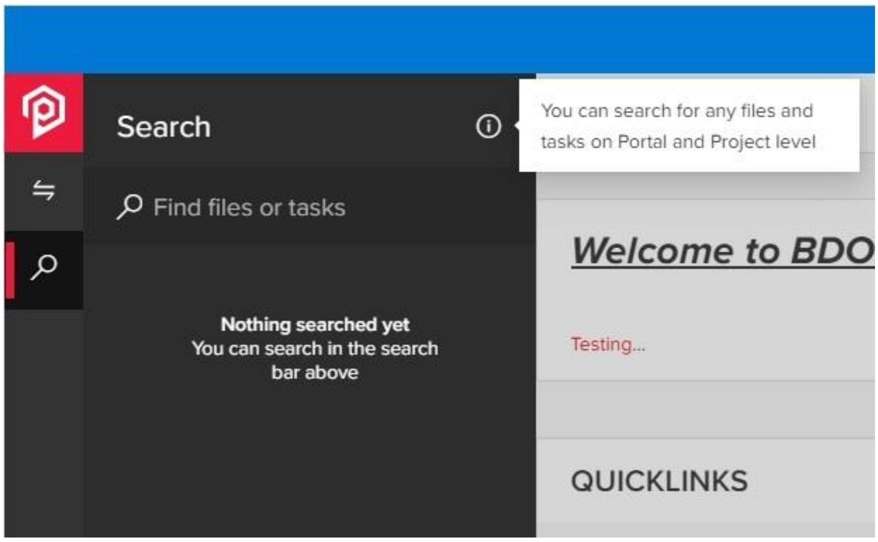
3.7.3 Document Search in any page of the Client portal

For a more user-friendly way to search tasks the black sidebar includes a search icon which is displayed when the user logs in to the Client Portal and is available for all users.



The search icon has a tooltip, which says "Search files/tasks". If the search icon is not selected, the menu is hidden. Clicking the search icon, will open the search menu. When the user clicks anywhere else on the screen the "Search" menu hides.

The search menu has a tooltip, which says *"You can search for any files and tasks on Portal and Project level*". Until nothing is searched yet, the message *"Nothing searched yet. You can search in the search bar above"* is displayed.



The search is automatically triggered when the user starts typing in the search field. Search results have two sections *Tasks in Exchange Next Gen* and *Files in Documents*. If any files/tasks are found the result will show up to 10 items.

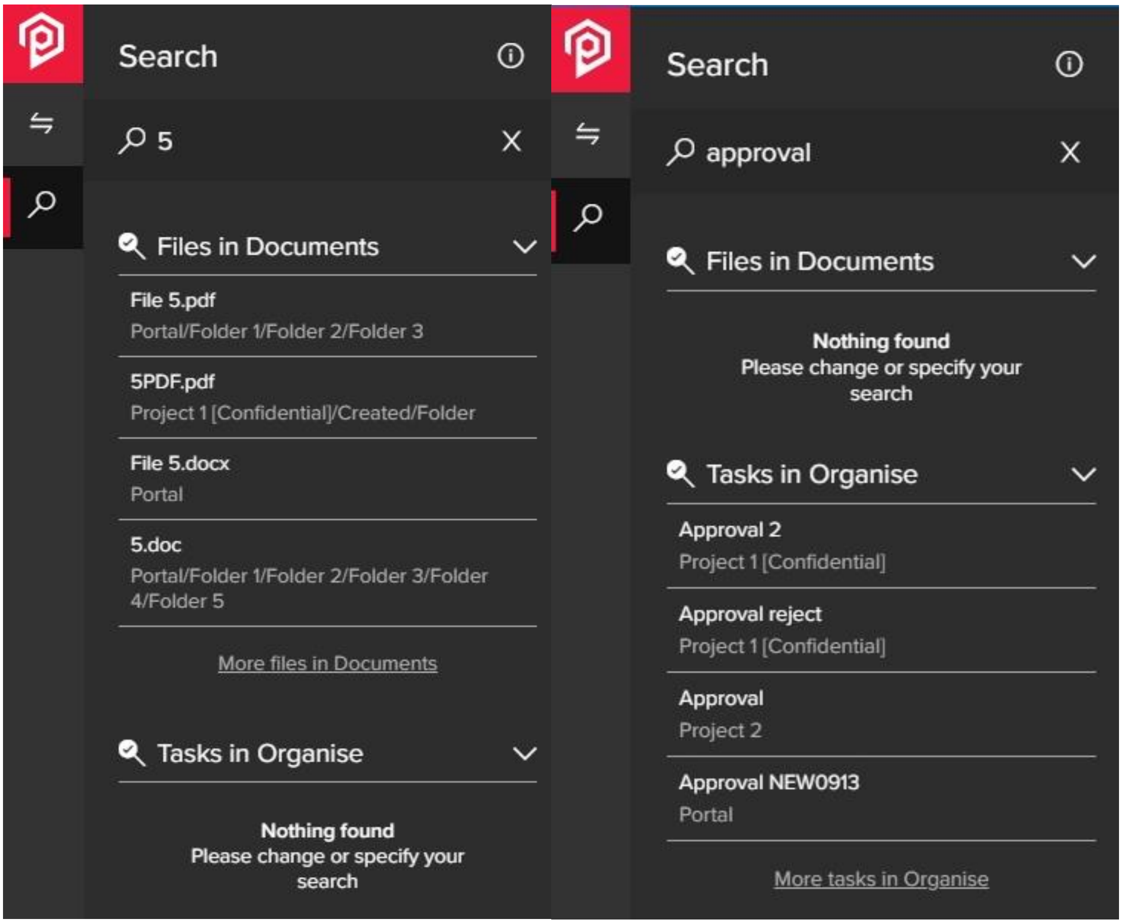
At the end of the *Files in Documents* results section, there is the text "Mores files in Documents", which contains the link. Clicking this link user will be redirected to the Documents page on the Portal level.

If there are no matching results of the searched files/tasks, the *"Nothing found. Please change or specify your search"* message will appear.

In the search results, the searched file consists of:

- a file name (.docx, .pdf, etc.),
- file location under file name in Portal level: Portal/folder/folder
- file location under file name in Project level: Project/folder/folder/

Clicking on the searched file will have it opened in new tab.



NOTE: Due to SharePoint limitations, no symbols (except for '$') in the files/tasks names can be searched for.

NOTE: The Search field can be somewhat out of sync with the actual Library. As the User sees Files/Tasks directly from the library, for them to appear in the Search field, they need to be indexed by the system after each change. This takes some time, usually up to a few minutes but if the system has a bigger load, it can take up to 24 hours to be fully indexed. The speed is also dependant on the amount of Files/Tasks, unique permissions.

3.7.4 Document viewing and editing online

You can open documents online to view or edit them. To do so, click on a document and it will open in its respective editor (MS word for .docx, Text editor for .txt, etc.). After you start editing the document it will periodically autosave the document.

If a file type is not supported for online viewing, an option to download the file will appear.

You can't manage a document while it is open, except for Downloading or Copying a Link Address. After a document is closed it will be unlocked shortly to enable file management.

3.7.5 Single Document Management

Actions to manage documents:

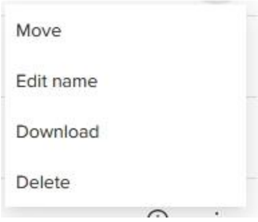
- Copy Link Address;

- Move;
- Edit Name;
- Download; (“”)
- Delete;

There is also an API to download files - “GetDocumentUrlById” request, which uses a document ID which can be acquired by using “GetClientDocs”; “GetProjectDocs”; “GetExchange ClassicCatReqItemDocs” requests.

Actions to manage folders:

- Move
- Edit Name
- Download
- Delete
- Manage Access



3.7.6 Multiple Document Management

Choose multiple files by selecting them one by one, or clicking on “Select All”.

Multiselected documents can be:

Deleted;

Moved;

Sorted;

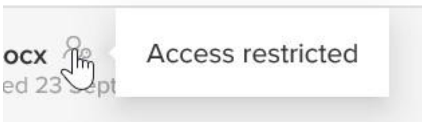
Downloaded;

3.7.7 Read-only

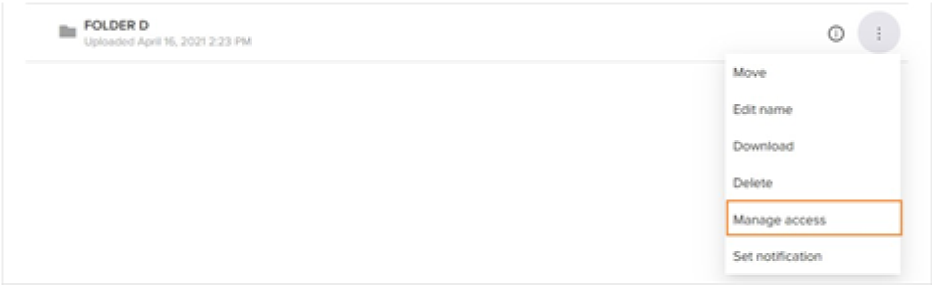
A document can marked as Read-only. This will make the file only viewable to all users and mark it with the read-only icon.

3.7.8 Manage Access

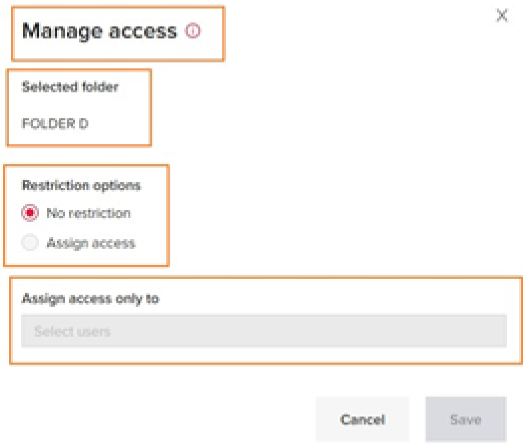
The access to a document or folder can be restricted by managing its access to a select amount of people. Only the users with access can see, view, edit, receive notifications and remove the managed access An Access restricted icon will appear.



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.

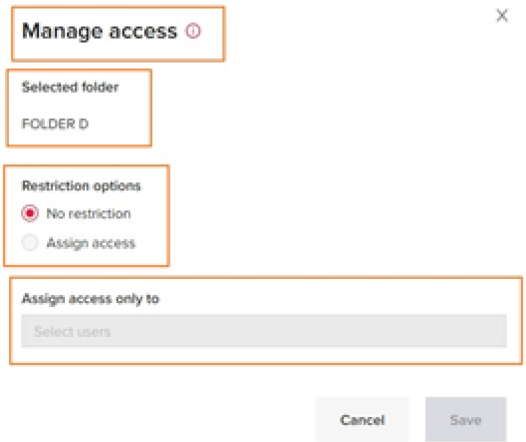


Clicking the “Manage access” button opens a new modal window to set up the access.



The pop-up icon “i”, is available for translation.

“Managing the access for a folder will prevent other users from editing and viewing the folder, its contents, and any sub-folders inside”.



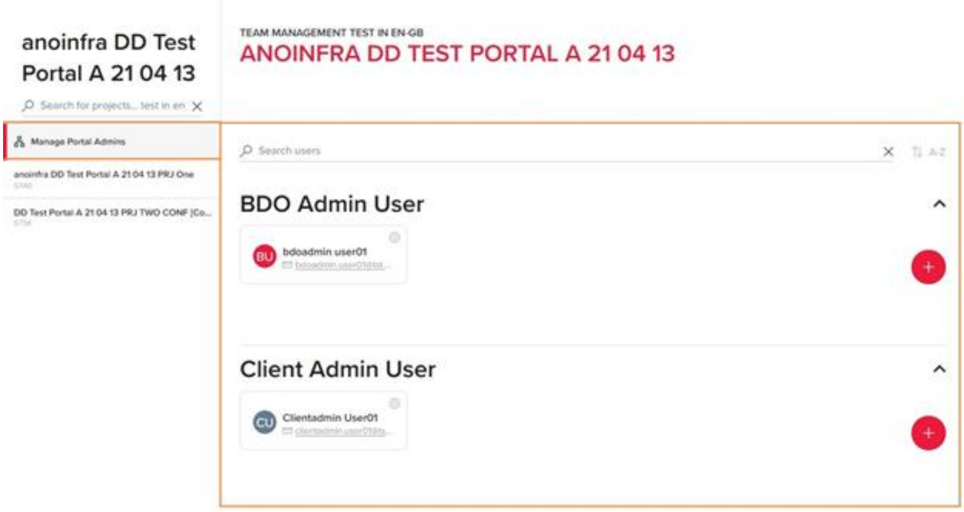
The folder that is being managed is displayed.

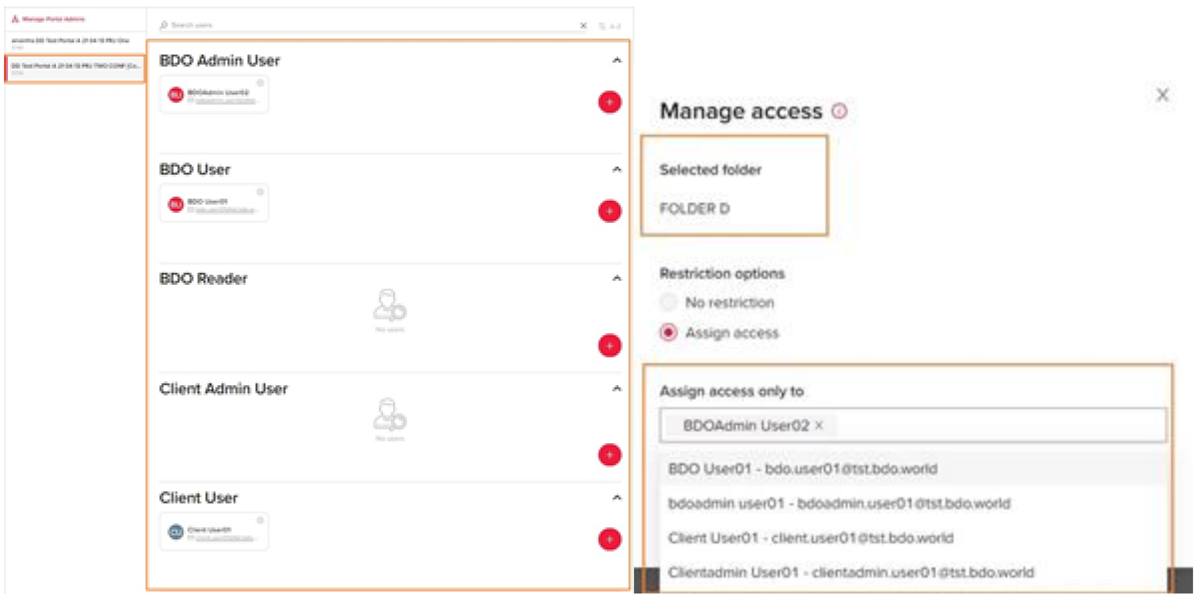
Two toggles appear:

- Remove access restrictions (“No restriction”).
- Assign access restrictions (“Assign access”).

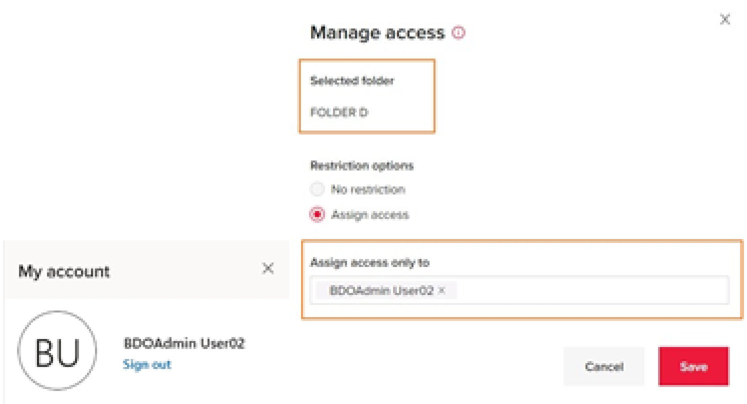
- When “No restrictions” is selected, any user who has access to the Portal/Project can see/edit the files and the “Assign access only to” drop-down is inactive (greyed out).

When the “Assign access” toggle is selected, the “Assign access only to” drop-down becomes active and any users who have access to the Portal/Project, and that have access to the directory being managed, can be set to receive managed access to the folder.

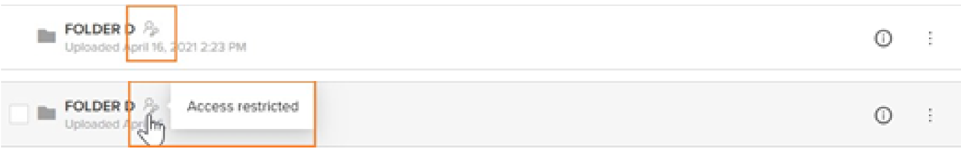




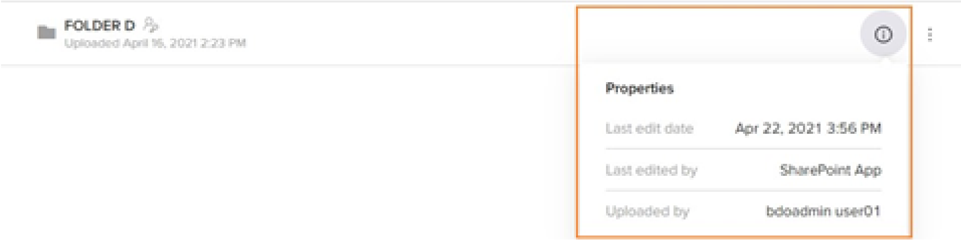
The user who is managing the restricted accesses for the folder, cannot remove himself from the list.



When a folder gets its access restricted, it is marked with a lock icon.

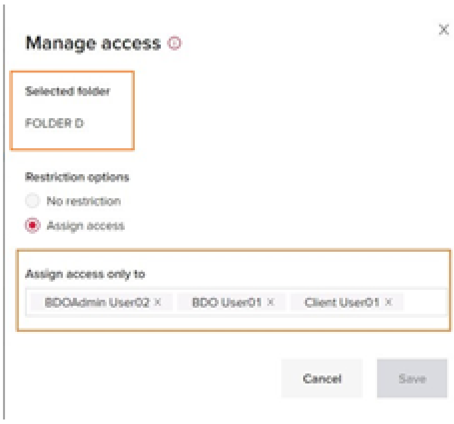


The “Last edited by” is marked as “SharePoint App” due to SP limitations.

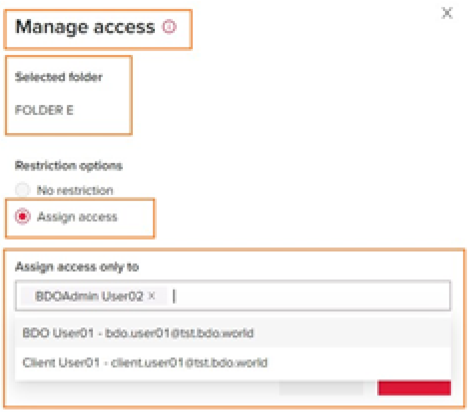


Right now the folder has an restricted access and can be reached only by users with explicit access.

Any files and folders within this restricted folder inherit its 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.



For files and folders that are inside a restricted access folder, the users who can be assigned are only those included in the parents’ restrictions.



The folders can be accessed only by users who have the new explicit access to view these files/folders, within the parent folder hierarchy.

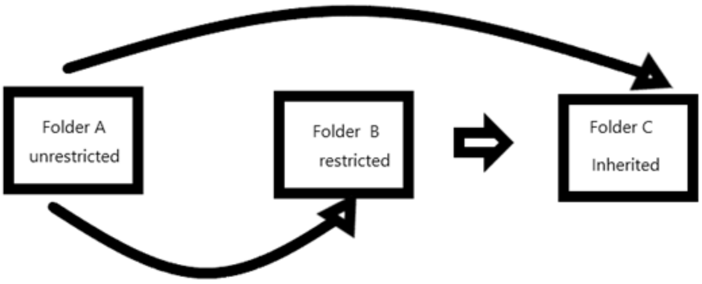
If the folder restriction is removed, it will again inherit its parents' restrictions.

When access restrictions are set on a parent folder level:

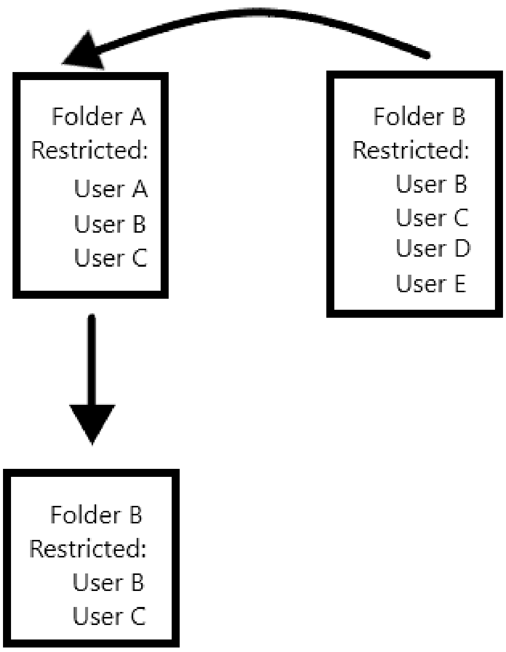
a. inherited access files and folders keep the access permissions inherited from the parent folder.
b. restricted access files/folders:
    a. if a user was added to the parent folder - restricted access files/folders under that parent folder keep their permissions unchanged.
    b. if a user was removed from the parent folder - he is also denied access to all the files and folders under that parent folder.

Moving folder with access restrictions has a few scenarios.

Moving a folder without restrictions, to a folder that does have restrictions, or inherited restrictions, inherits the parents' restrictions.



Moving a folder with restrictions under a folder with different set of restrictions, will keep in only users that match with the parents access restriction list (see the image below).

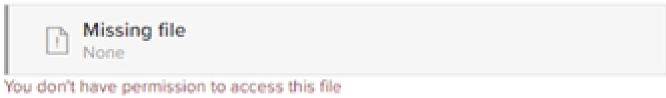


If the user list of the moved folder does not match users of the folder being moved into, then it is not possible to move the folder.

The user cannot move a folder if it contains at least one object that this user cannot access.

If the folder includes any read-only files, it is not possible to manage the access restrictions or to move the folder.

Only users with an access to the specific directory can be assigned a task related to the documents. Users without access will see the task but will be unable to view, edit or download the document.



If a user loses access to a Portal/Project, he will be removed from every access restriction he was added in to.

NOTE: Like other document related functionality, there is a limitation of up to 5000 unique permission restrictions per document library.

In case where a folder or file cannot be accessed by anyone, because of offboarding, the Tech Admin assignee will be able to view the files and folders in the Documents page. If more management is needed, it is possible to go to the Share Point Site for the respective Portal/Project and fully manage the document from there.

The user can only delete a folder if he can access all the files and folders inside that folder and if there are not any read-only items in that folder.

Any user who cannot access the file or folder cannot view/access these files/folders in recycle bin when they are deleted.

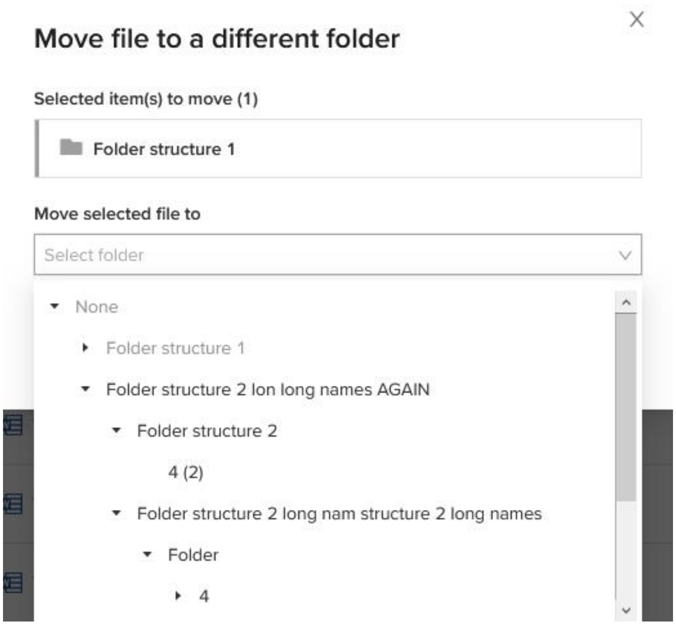
If a file or folder without restrictions is restored - it inherits the permission from the folder, to where it gets restored to.

All restrictions for restricted access files are kept the same as they were before deleting the file.

If the parent folder is deleted, no child files/folders can be restored.

3.7.9 Moving Files and Folders

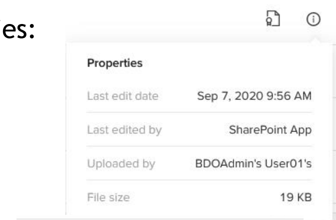
You can move files and folder to a desired directory, in the same Portal/Project, by using the move buttons. This will open a pop-up with a directory tree of the Portal/Project where the document resides. Limitations are that you can’t move to a directory where a file of the same name already exists.



3.7.10 File/Folder Properties

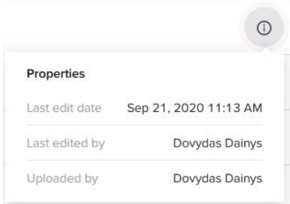
Files have the following properties:

- Last edit date
- Last edited by
- Uploaded by
- File size



Folders have these properties:

- Last edit date
- Last edited by
- Uploaded by

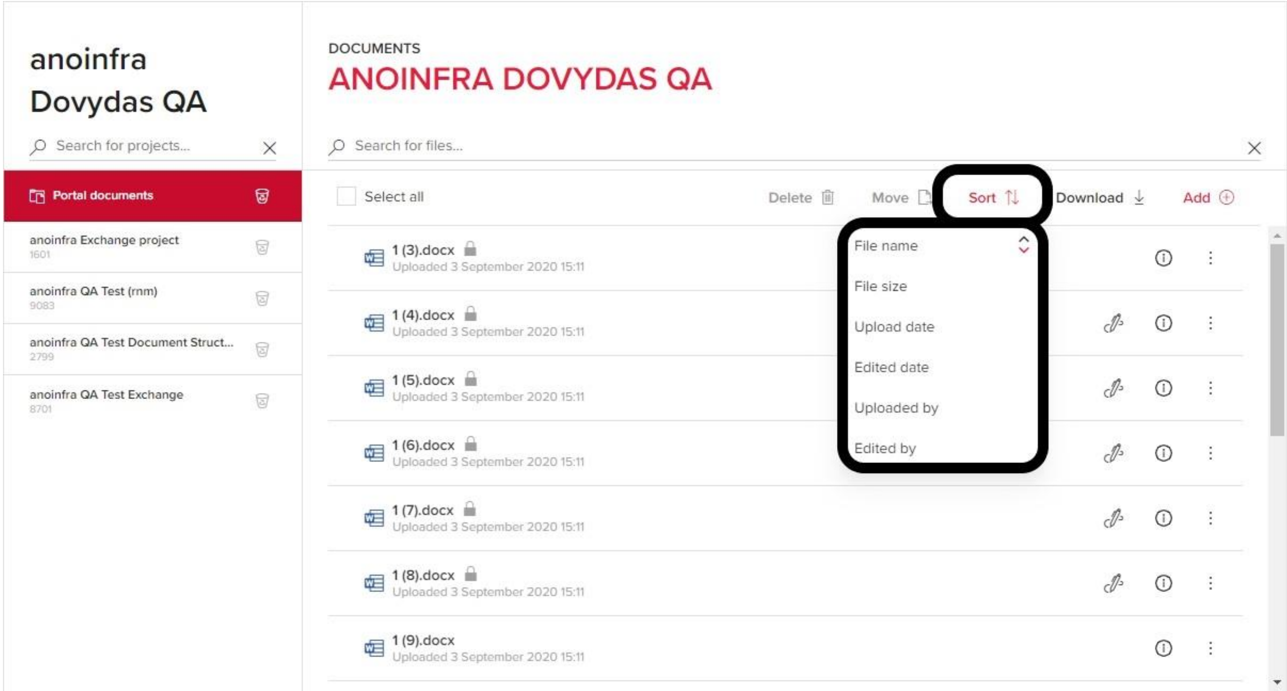


3.7.11 Sorting

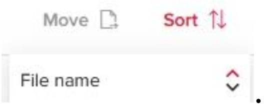
Folders are always going to be on top, files beneath.

You can sort files and folders by:

- File Name
- File Size (Only for documents)
- Upload Date (Only for documents)
- Edited Date
- Uploaded By
- Edited By



You can sort in Ascending or Descending order by clicking on the Sort Filter again.



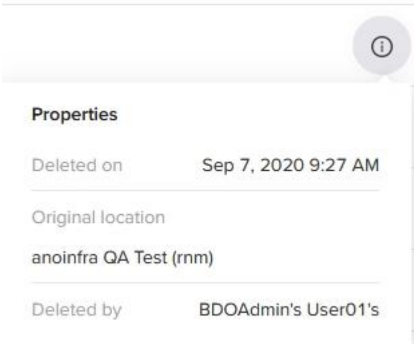
3.7.12 Recycle Bin

You can access the recycle bin where the deleted files and folders reside for 90 days and can be restored to the original directory or permanently deleted.

After deleting a file/folder a success message appears.

Files in the recycle bin also have properties:

- Deleted on;
- Original location;
- Deleted by;



Files in the recycle bin can also be sorted, but with these filters:

- Deletion date;
- Deleted by;
- Original path;

3.7.13 File and Folder verification

The maximum file size is 2GB.

A Document name can't contain any of the special characters: " * : < > ? / \ ~ |. If the upload contains the characters an error message is displayed and it is not possible to upload.

A Documents name must be unique per parent folder. A validation message is displayed if a duplicate file is uploaded.

A Document name must be 1 to 100 characters long. If more than 100 characters were entered, a validation message is displayed.

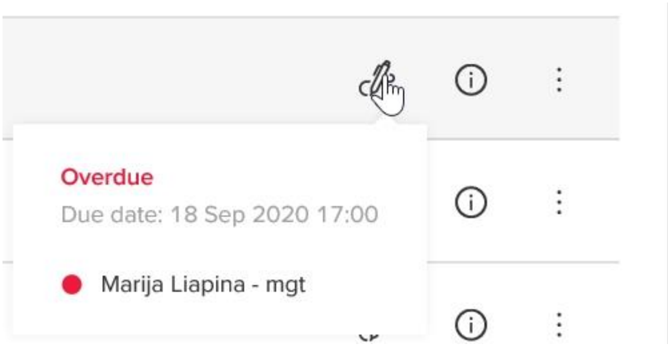
A Documents file type must be in the list of file types accepted by the BDO Global Portal and is tenant-specific.

If there are any connection issues or the computer goes to sleep during the upload, an error is displayed.

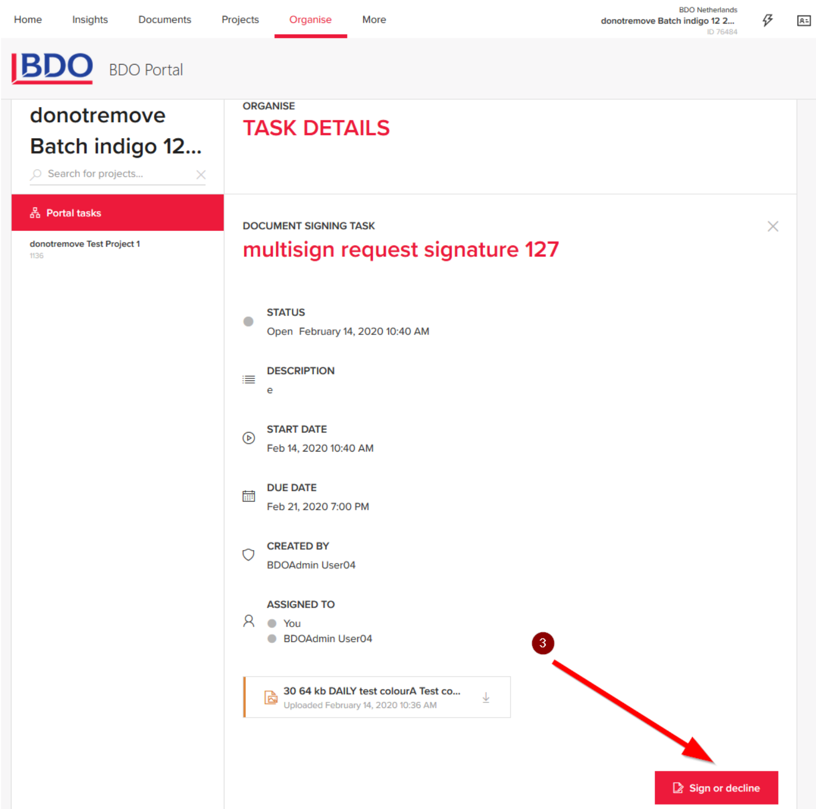
While uploading a document it is possible to continue working on different files.

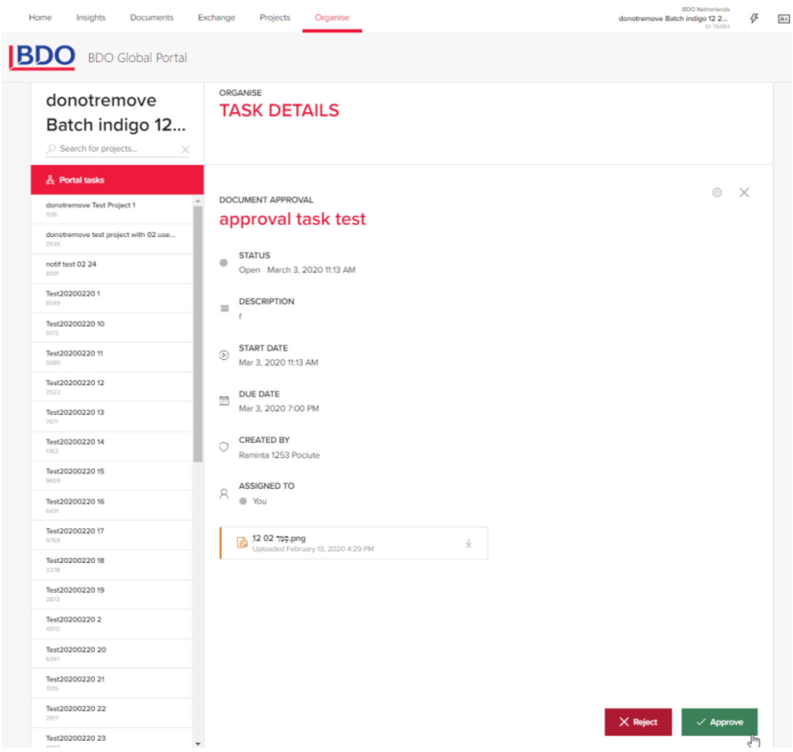
3.7.14 Task opening from the Documents page

If a document in the list has an open task (signature request or approval request), then the document in the list will have a task icon next to it. A portal user can see details of the task by hovering over the icon. Clicking on the icon will lead you to the task in the Exchange Next Gen page.



If a task is assigned to them, they will also be able complete it:



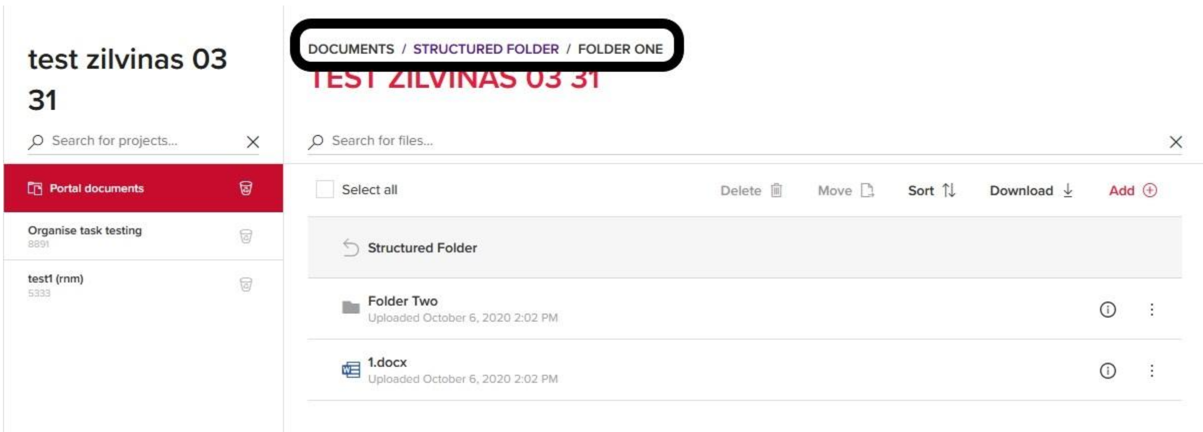


Documents, which are associated with already completed tasks will have a green bar next to them.

3.7.15 Breadcrumbs

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.

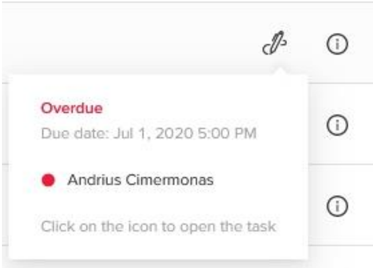
The BDO Global Portal user can navigate the Documents page folder directories with breadcrumbs so that he can navigate a folder tree faster by clicking on the specified folders breadcrumb.

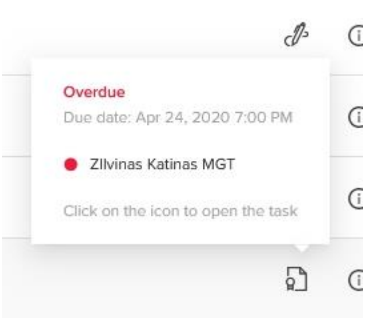


Only the last three folders are displayed (closest to the current directory).

The rest are in a list under the drop-down.

Signing and Approval tasks have icons which have an info pop-up when hovered and if clicked, redirect to the task in Exchange Next Gen.





3.8 MY INSIGHTS

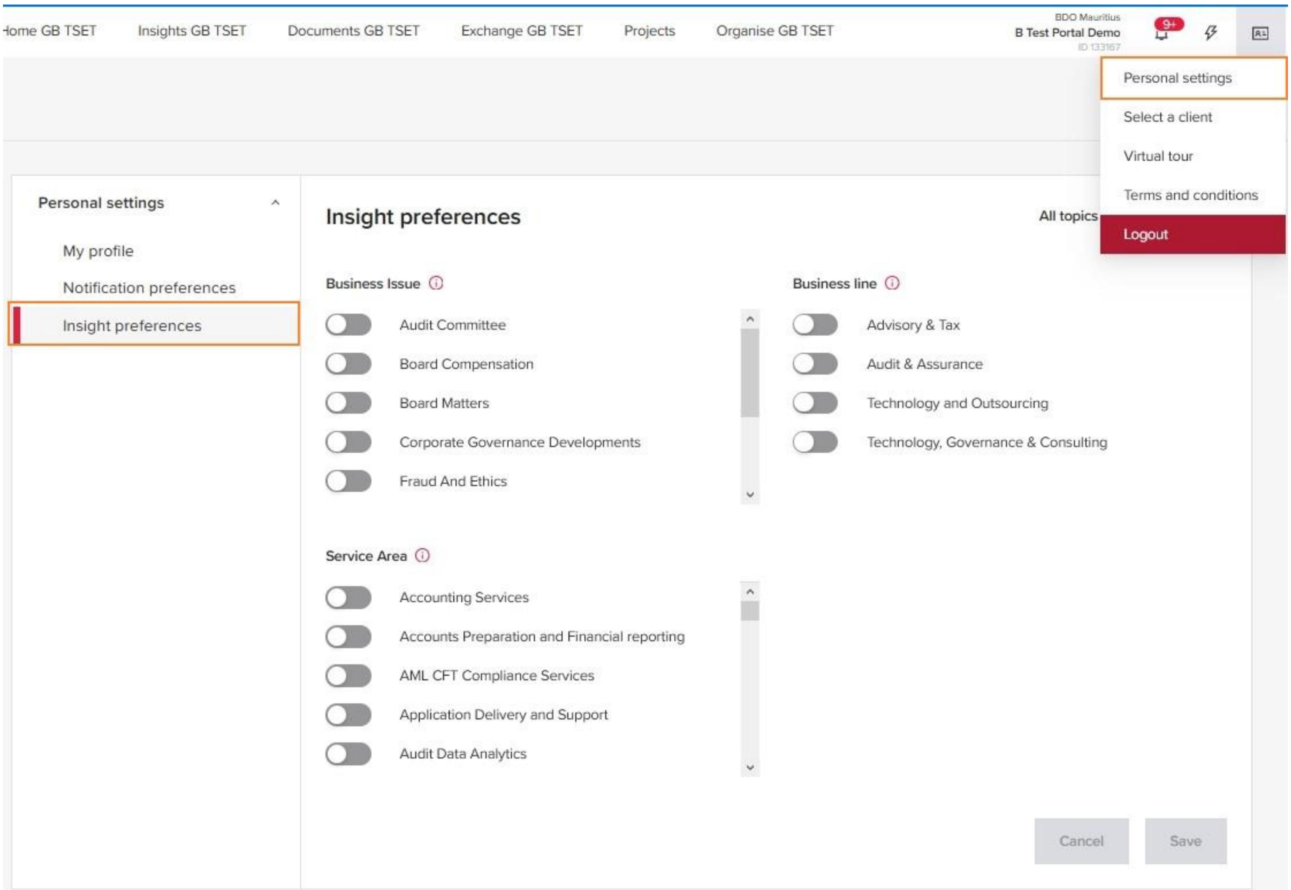
If the BDO Firm is configured to show Insights, then users will be able to see Insights in various sections of the Portal.

Information appearing in these sections is extracted from the BDO Firm website and is managed by the BDO Firm.

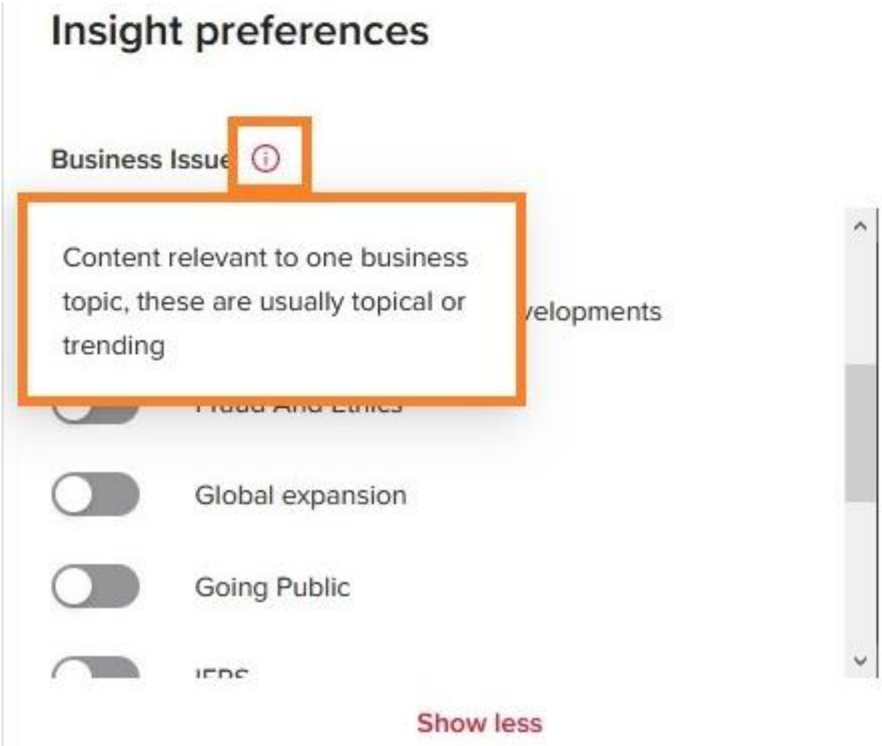
If the BDO firm website offers insights in multiple languages and the language selected in the user profile matches, then the user will see only insights in that specific language, otherwise the user will see insights available in any language independently of their current language selection.

3.8.1 My Insights Preferences

The “My Insights” preferences page is accessible via the “Personal Settings” page or to the right of the search box in the “My Insights” page.

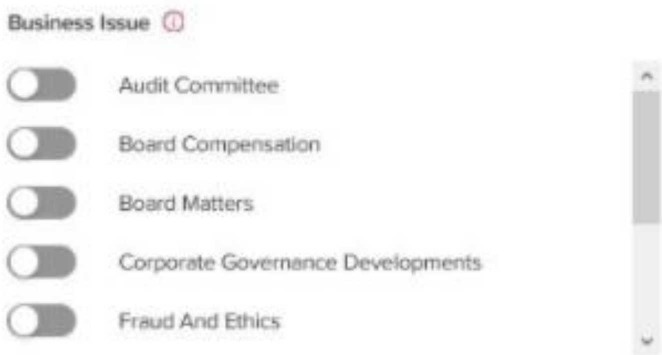


It shows the four main categories which are always present, each one having an information **"(i)"** icon with descriptive info about the category:
Business Issue: Content relevant to one business topic, these are usually topical or trending
Business line: Content relating to BDO's core services
Service Area: Content relating to a more specific service offering within our core services
Industry: Content relating to a specific industry sector.



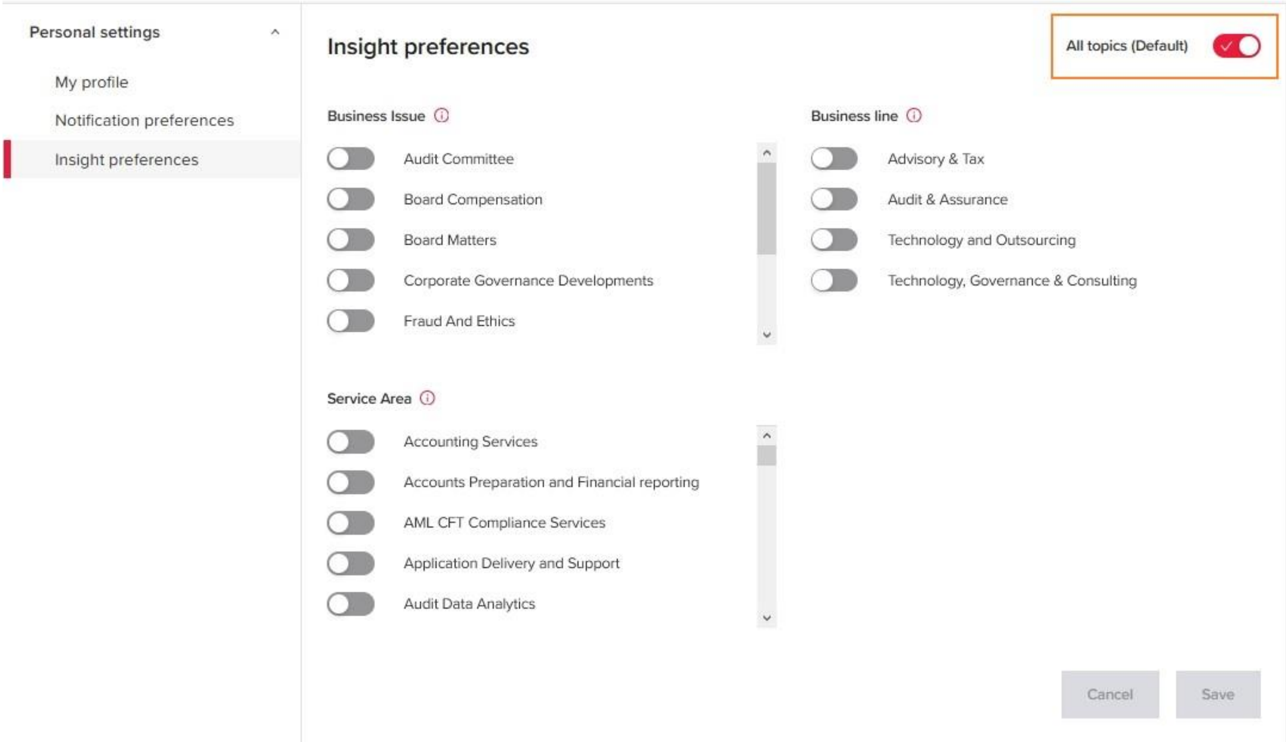
Each category has sub-categories specific to MF/Default Language that are pulled from the Global Web Template (GWT) or from other templates, depending on the set-up.

Category columns show all of the sub-categories. The column is a scrollable list.



If filtering by sub-categories is wanted, at least one sub-category from each category must be selected, otherwise an error pop-up will appear.

There is also a “Default” filter, which does not filter by sub-category and shows the newest Insights. This is set to ON by default for new users.



Turning ON “Default” disables all selected sub-categories and does not save the selection. After disabling “Default” all sub-categories are disabled. Selecting a sub-category disables the “Default” toggle.

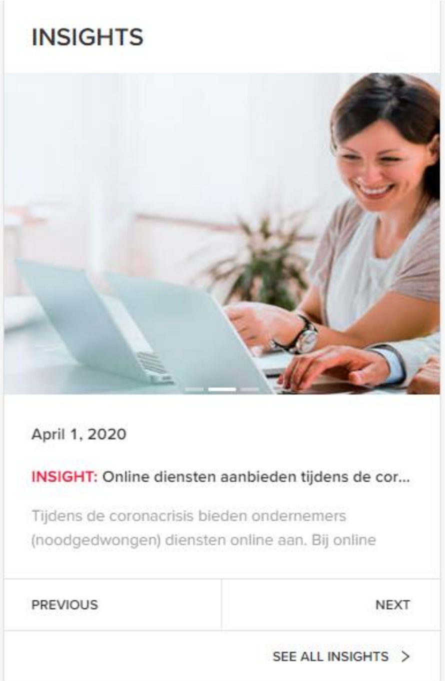
After editing your preferences, selecting “Cancel” will revert your changes.

After editing your preferences, navigating away from the preferences menu will prompt a pop-up, notifying you that changes will be lost if the page is left.

After saving the changes, a success pop-up appears.

3.8.2 My Insights carousel

If configured by a BDO Firm, Insights will show on the Home Page of the Client Portal and will feature up to the 3 most recent insights available on the BDO firm website.



Two buttons: “Previous” and “Next” are added to navigate between different insights.

“SEE ALL INSIGHTS” – opens the My Insights page

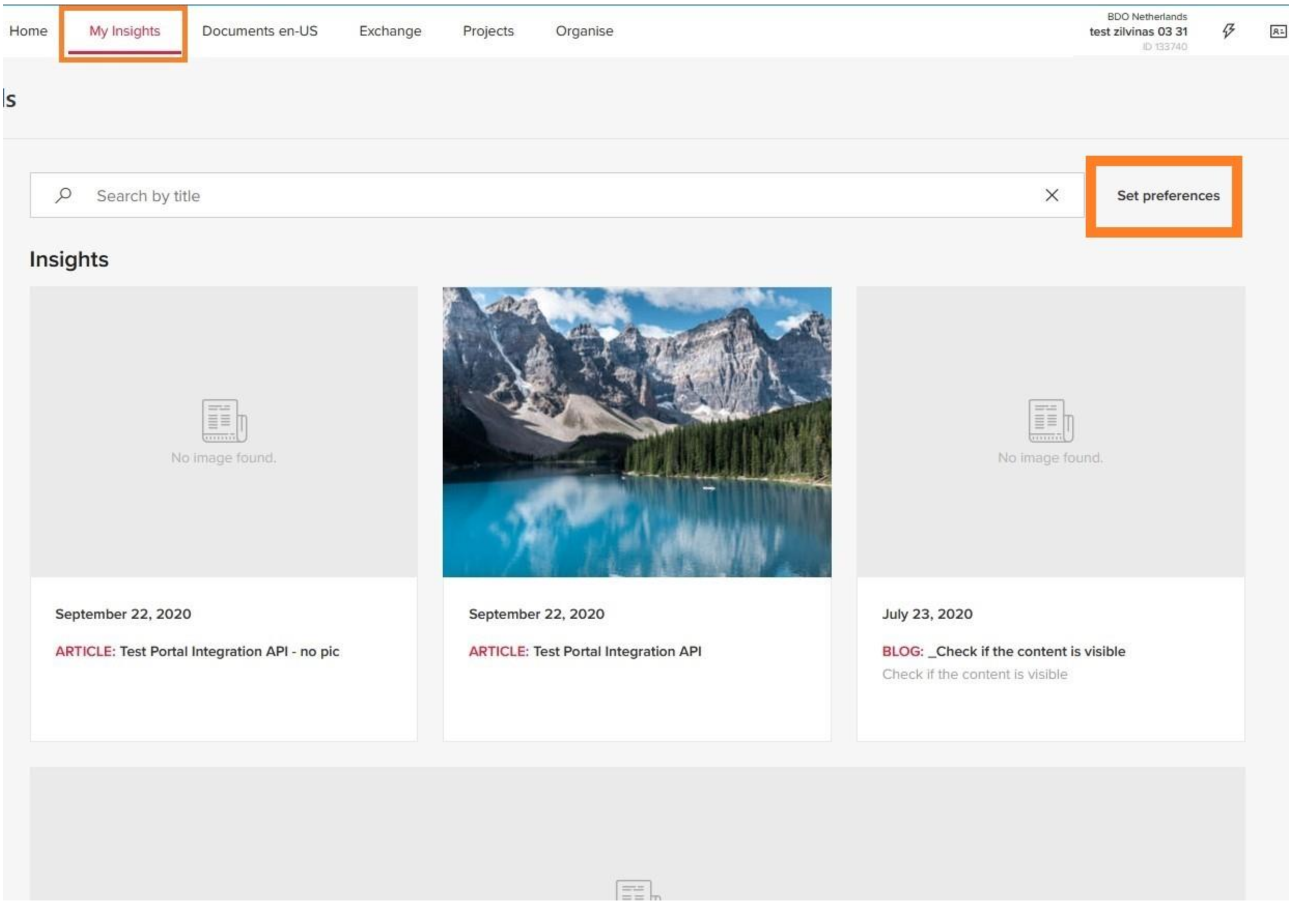
Clicking on an insight will re-direct you to the article.

3.8.3 My Insights page

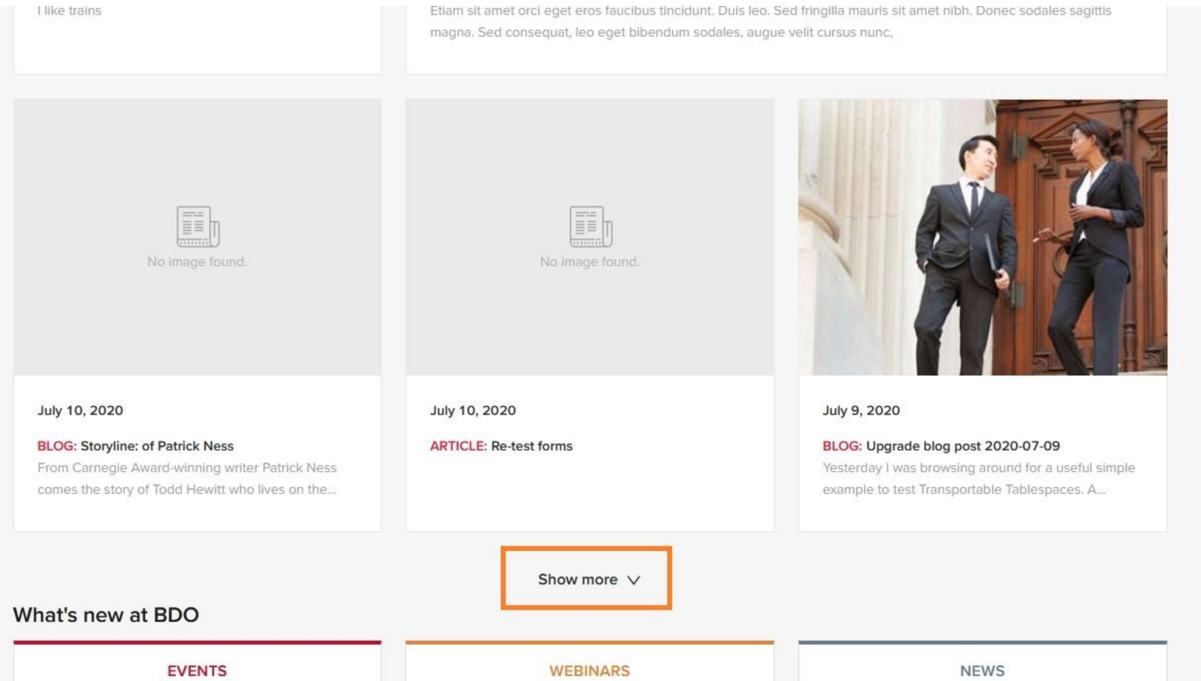
The Insights page is accessible via “My Insights” link in the top navigation menu as well as via “SEE ALL INSIGHTS” link in the Insights carousel.

At the top, there is the Insights section, a search box to search the contents of Insights and a button to the right for quick access to the My Insights Preferences.
Beneath are the filtered insight articles.

Insights content has:
Title;
Insight Type;
Date;
Short Summary;
Image; (If there is no image, a “No Image found” icon is displayed.)

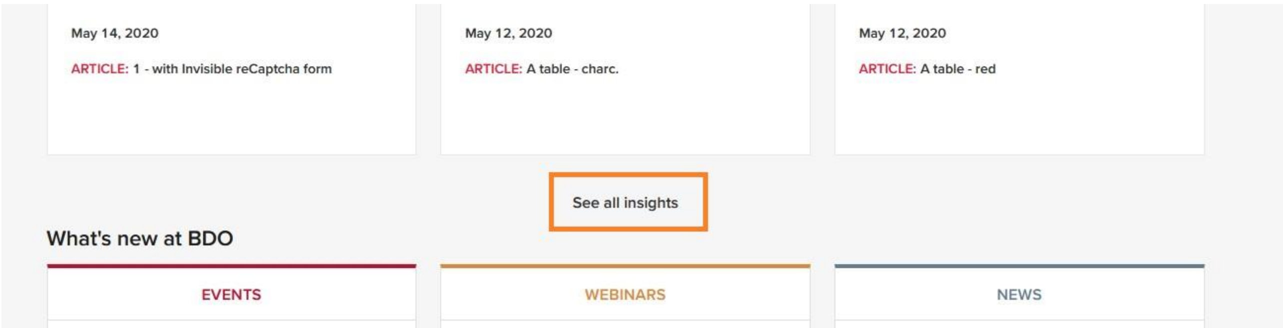


The page will initially show 6 Insights ordered by most recently published articles on top. Clicking "Show more" will load three Insights at a time, but no more than 15 Insights.



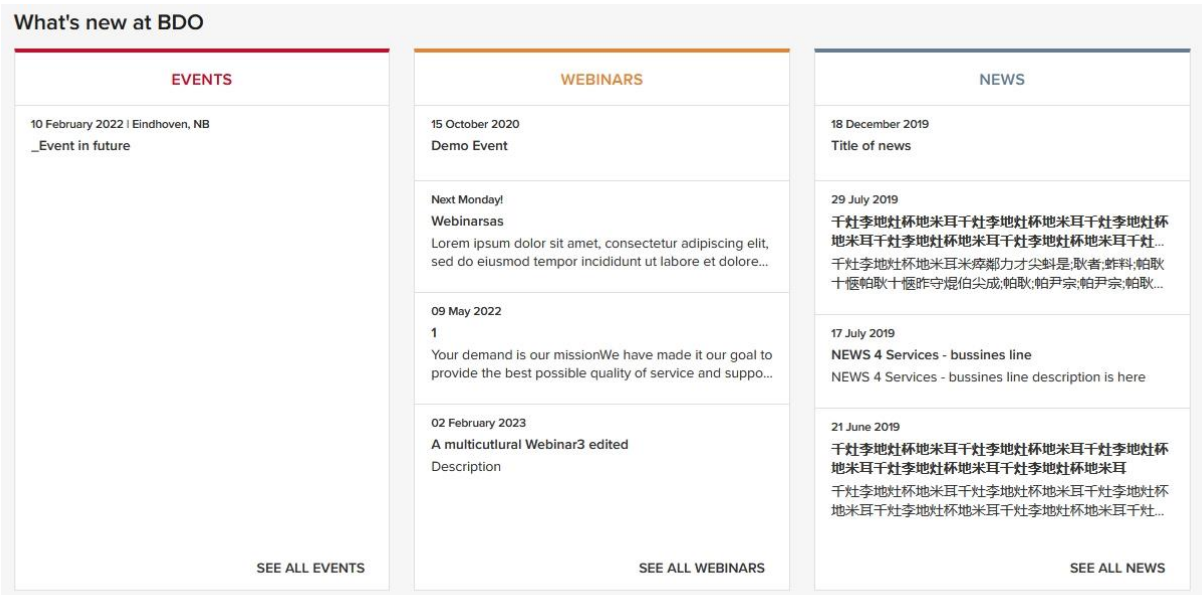
Only the desired topic articles about which the portal user is interested about, will appear on the Insights page. See the Insight details page section for more information. Clicking on them will re-direct the user to the article.

If there are more than 15 Insights available on the BDO Firm website, then Insights page will feature a link to the BDO Firm insights page to access all insights.



At the bottom of the Insights page there is the “What’s New at BDO?” section, which has 4 categories. Information that are shown in the GWT is also shown in the BDO Global Portal. The GWT can be configured by the MF (elements be disabled altogether). A maximum of 3 categories are shown at a time. A maximum of 4 articles are displayed per category (except Social).

The categories are:
Events;
Webinars;
News;
Social;



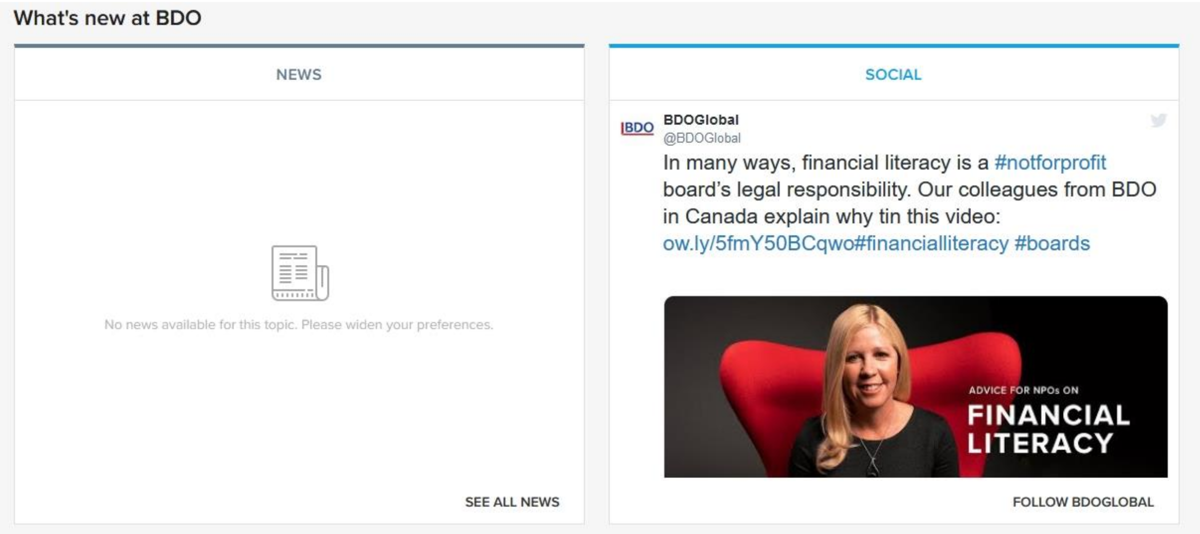
Event articles have:
Title;
Short Summary;

Date;
Location;

Webinar articles have:
Title;
Date;
Short Summary;
Date text override (optional, per article);

News articles have:
Title;
Short Summary;
Date;

Social entries are tweets from the BDOGlobal Twitter account and is an infinite loadable list.

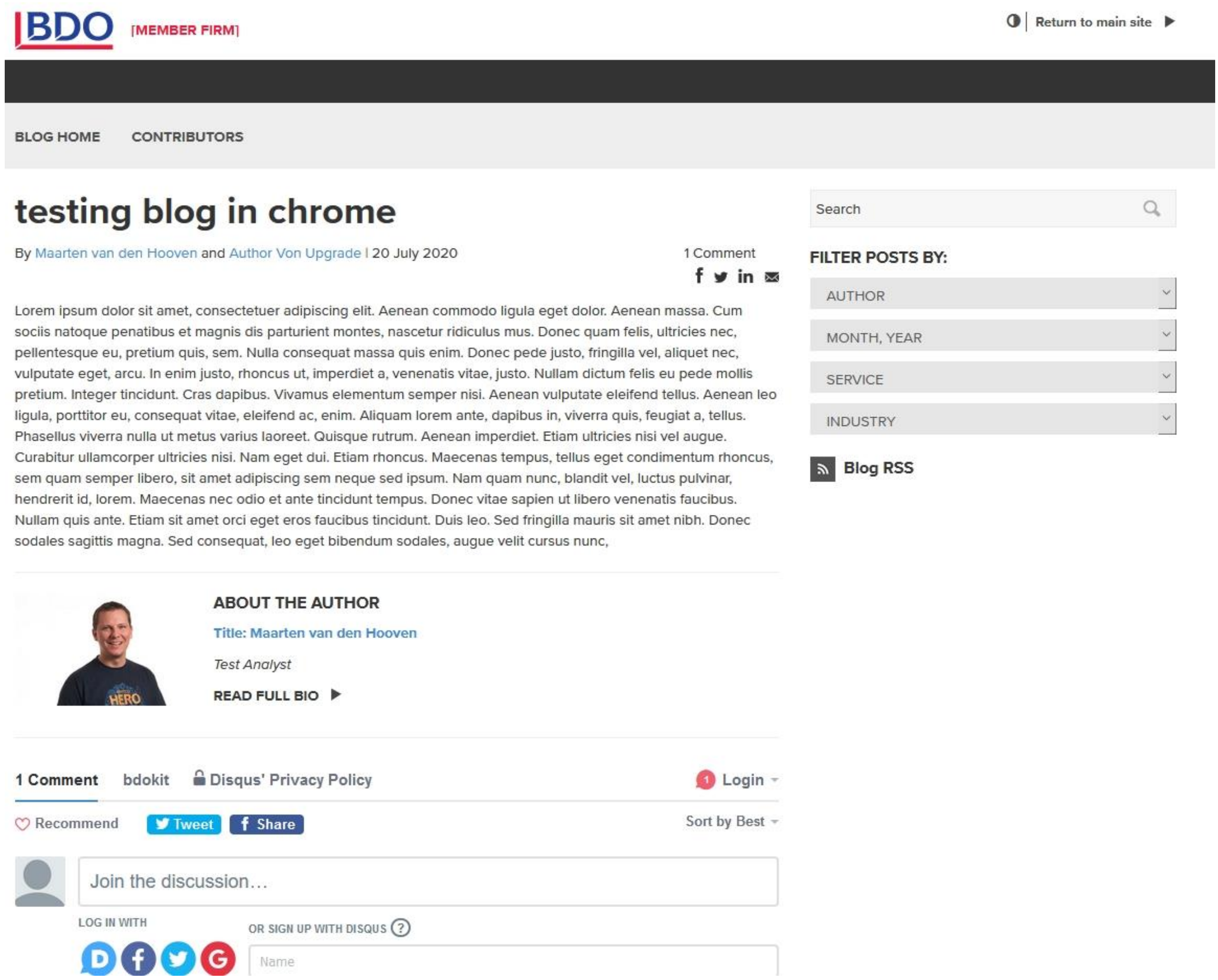


Clicking on any article/tweet will re-direct you to the respective article/tweet.

Each category has a "See all {CategoryName}" ("Follow BDOGlobal" for Social) button in the bottom right corner which will re-direct the user to (BDOGlobal twitter for Social) the advanced search page in the GWT that is filtered by the selected category or by any other category, which depends on the Firm set-up.

3.8.4 My Insight details page

Specific insight detail pages can be accessed by clicking on an insight details on the Insight.



3.9 CLIENT-SIDE TEAM MANAGEMENT

The BDO Global Portal allows the assignment of Client user permissions on Client Portal level or per specific project.

Only Client employees who belong to Client Admin group can add users to / remove users from Client Admin and Client User groups. Users who are members of Client User group on any specific project can't manage other user permissions.

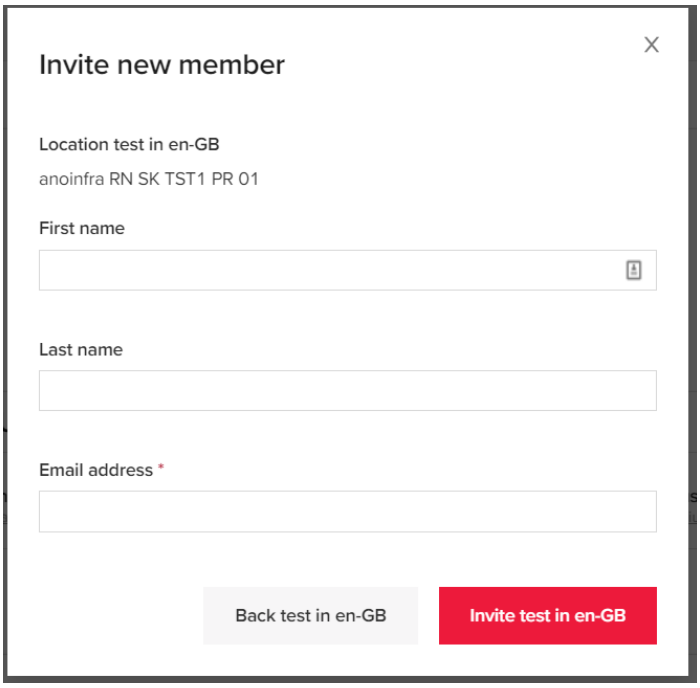
Please also note that BDO Portal user can't manage their own permissions. Except BDO MF Tech Admin as this user can manage both BDO and Client-side user as well as his own permissions.

Client Admin users on Client Portal level always have access to manage users on Client side of the team (Client User and Client Admin on both Portal and Project level within the Portal).

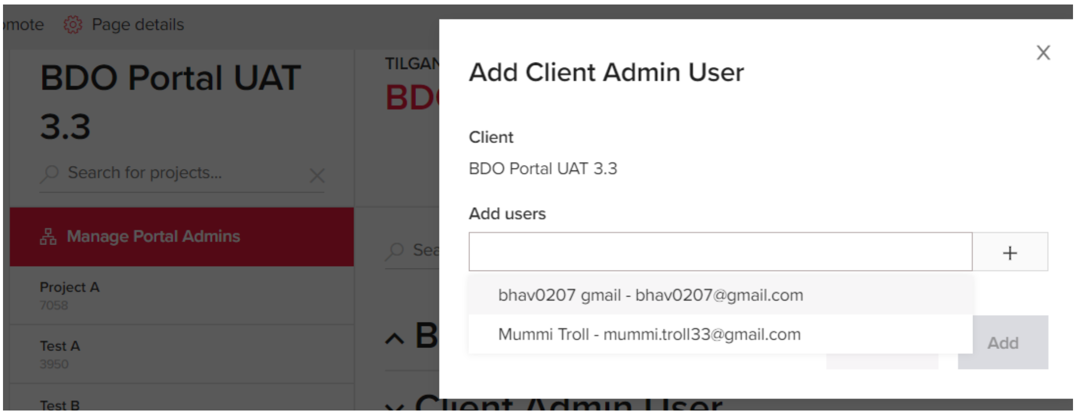
Depending on the Security system selected by the BDO Firm during onboarding, Client Admin users on Client Portal level may also have access to any project content created under that Client Portal. If there is a need to restrict default access to the project content while keeping access to team management functionality for Client Admin users, this can be achieved by selecting different security system for the BDO Portal during the BDO Firm onboarding.

To add user to a group, user should click on '+ Add User' for the group (the button will only be available for the user has sufficient permissions to manage).

The user's email is mandatory, the First name and Last name fields are optional for inviting a new user to a Client Portal:



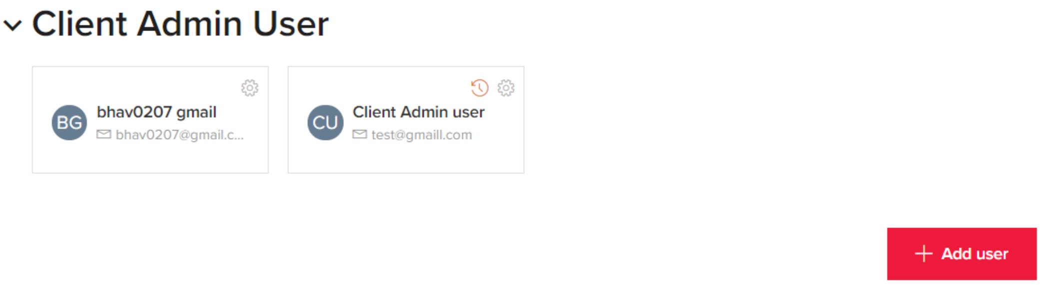
Alternatively, if the user already existing in the Client Portal (has access to one of the projects under the Client Portal or to the portal itself), they can be selected from the people picker:



To remove user from a group, click on gear icon for the user and select 'Remove' in the menu options:

Gear menu is not available for the users in group which currently logged in user doesn't have permissions to manage.

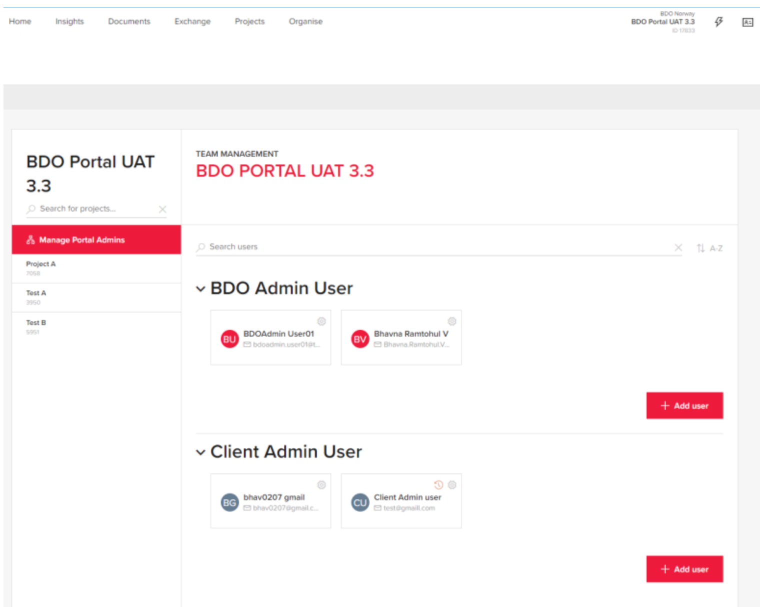
Users who were invited to a BDO Portal environment, but who have not redeemed their invitation yet, may have a watch icon appearing next to their name in the team management:



Please note that project and Client Portal permissions adjustments require time to fully apply and may not reflect in user accounts immediately.

3.9.1 Client Portal team management

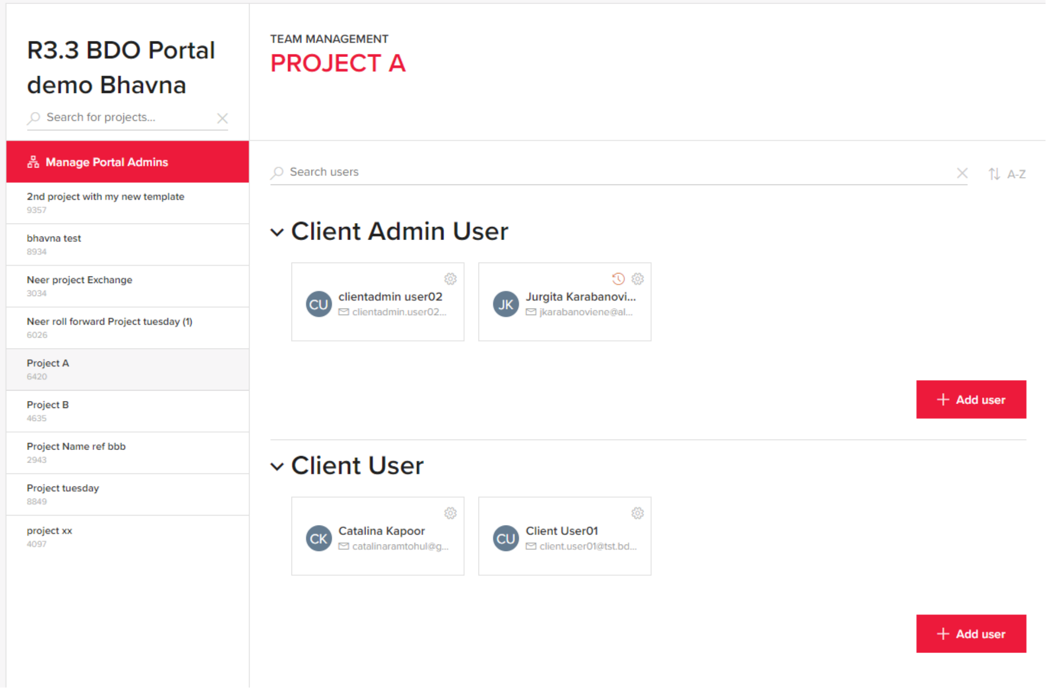
Client Admin user group on the Client Portal can be managed by users with sufficient permissions via ‘Manage Portal Admins’ link in the top left corner of the Client team management page (which can be accessed via Portal menu > ‘Team Management’ option):



On the same page Client Admin users can also see users from BDO Admin user group but can’t modify content of the group.

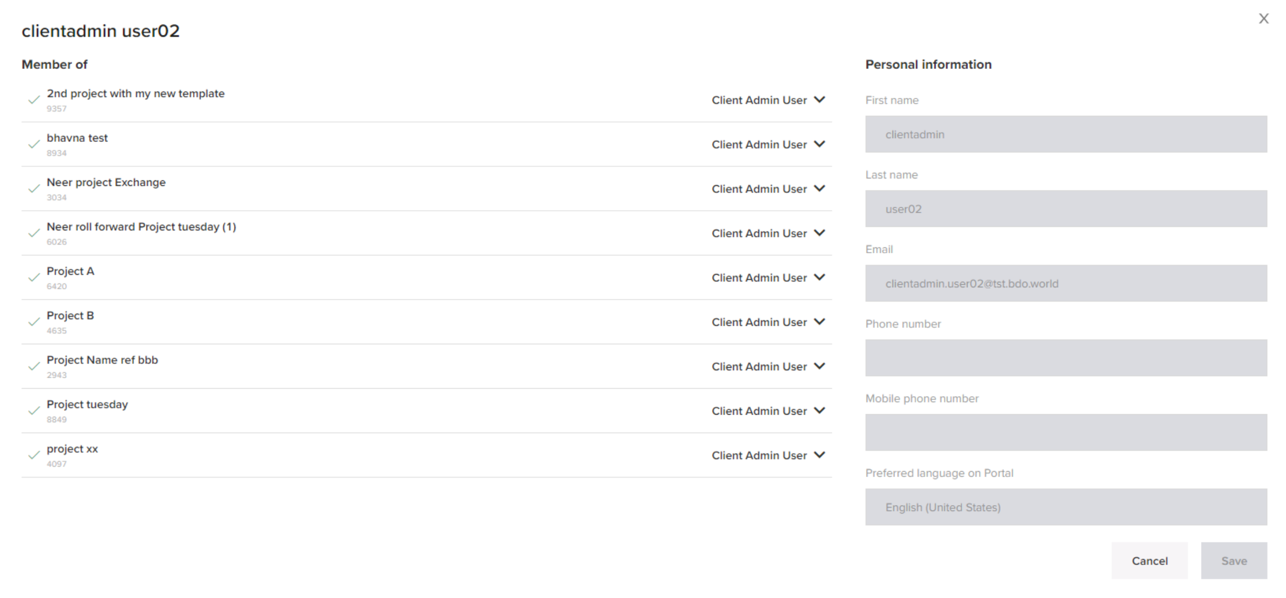
3.9.2 Project team management

Both Client employee groups (Client Admin and Client User) for a specific Project can be managed by users with sufficient permissions on Team management page (Portal menu > ‘Team Management’ option > then select specific Project name in the left menu:



Currently selected project is highlighted in the project list on the left.

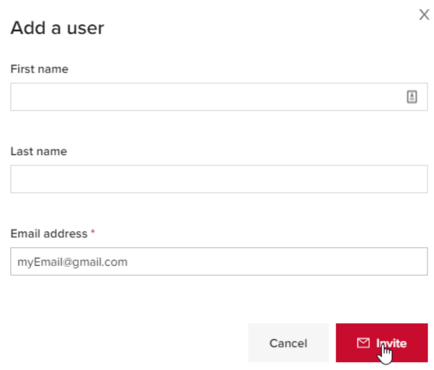
'Edit' option in gear menu of a specific user offers read-only information about user profile (name, emails, etc) as well current projects selected user is assigned to (and allows adjusting these multiple projects at a time). Only projects the currently logged in user has access to manage groups on are available for this action:



When granting permissions to a user please note that the same user can only be a member of one user group for a specific project.

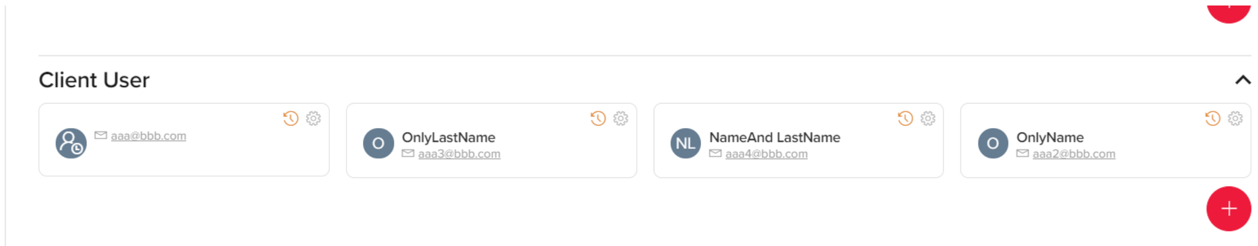
3.9.3 Add Client user without first/last name

When adding Client users to Portal or Projects on Team Management or via API, the First name and Last name fields are no longer mandatory. This way Clients can add additional information themselves on their first login. The Email field remains mandatory.



In the Team management page:

- If only email was provided - then email is displayed as user's name.
- If only first name was provided – then first name is displayed as user's name.
- If only last name was provided – then last name is displayed as user's name.
- If first and last name was provided – then first name and last name is displayed as user's name.



When the Client user first logs in to the BDO Global Portal, they select screen shows their email address if first and last name were not provided. If first and last name were provided, the first and last name are displayed in the Client select screen.

After the user enters his first/last name on the first login, first and last name should be saved and displayed in the Client Portal.

4. BDO GLOBAL PORTAL USAGE LIMITS

4.1 FILE UPLOAD LIMITS

Limits listed below are applicable to Azure site (frontend) of the BDO Global Portal application.

- 30 files is 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
- Characters support in file names:
    - English alphabet is supported
    - Norwegian alphabet is supported
    - Hebrew alphabet is supported

4.2 REQUEST DOCUMENT SIGNATURE (DOCUSIGN) LIMITS

4.2.1 File type limit

DocuSign tool has limitation for types of files which can be signed using it.

Out of all file formats allowed in the BDO Global Portal the following can be signed using DocuSign in the BDO Global Portal at this time:

- .doc, .docm, .docx, .dot, .dotm, .dotx, .htm, .html, .msg, .pdf, .rtf, .txt, .wpd, .xps, .gif, .jpg, .jpeg, .png, .tif, .tiff, .pot, .potx, .pps, .ppt, .pptm, .pptx, .csv, .xls, .xlsm, .xlsx.

4.2.2 File size limit

The BDO Global Portal supports requesting signatures via DocuSign for files up to 25MB.

4.2.3 Other limitations

DocuSign does not support files with password security enabled. To request a signature for a file with password security, remove the security setting before uploading the file to the BDO Global Portal and requesting a signature for it.

4.3 FILE STORAGE LIMITS

It is not recommended to upload more than 5000 files or folders into a single folder. Platform performance may be affected by big number of files or large amount of data.

Single site collection size is limited to 25TB.

5. ALLIANCE MEMBER FIRM

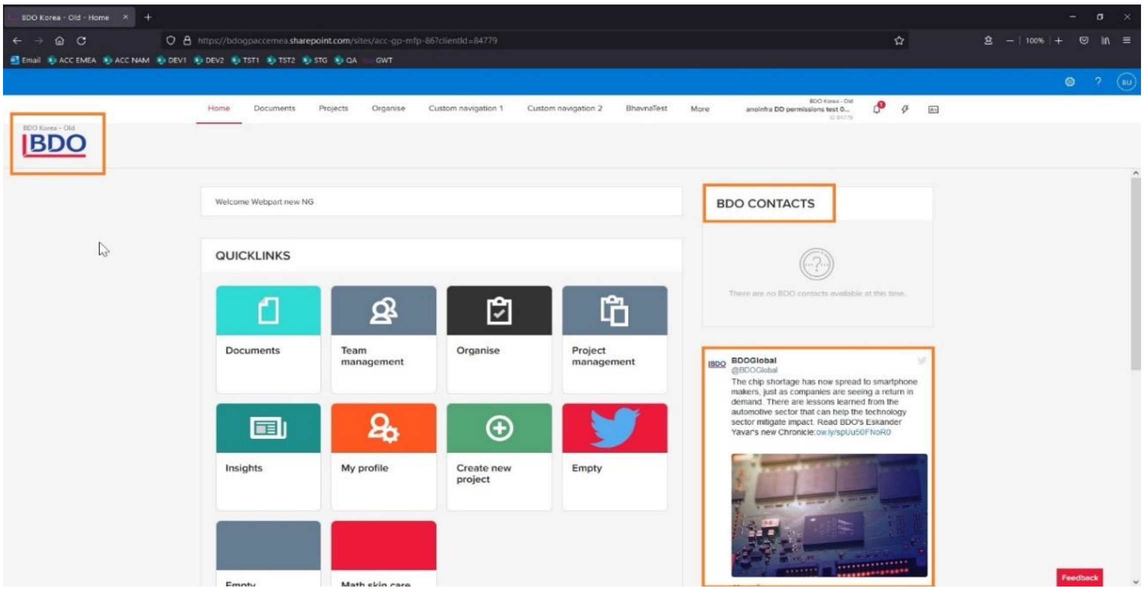
New Member Firms can now be created with the option to select if they have BDO or Alliance branding. Once the branding is selected, it cannot be changed. If chosen to be an Alliance MF, the BDO branding is removed from the BDO Global Portal and re-branded with Alliance firm brand. Any Alliance MF user can see the Alliance firm branding.

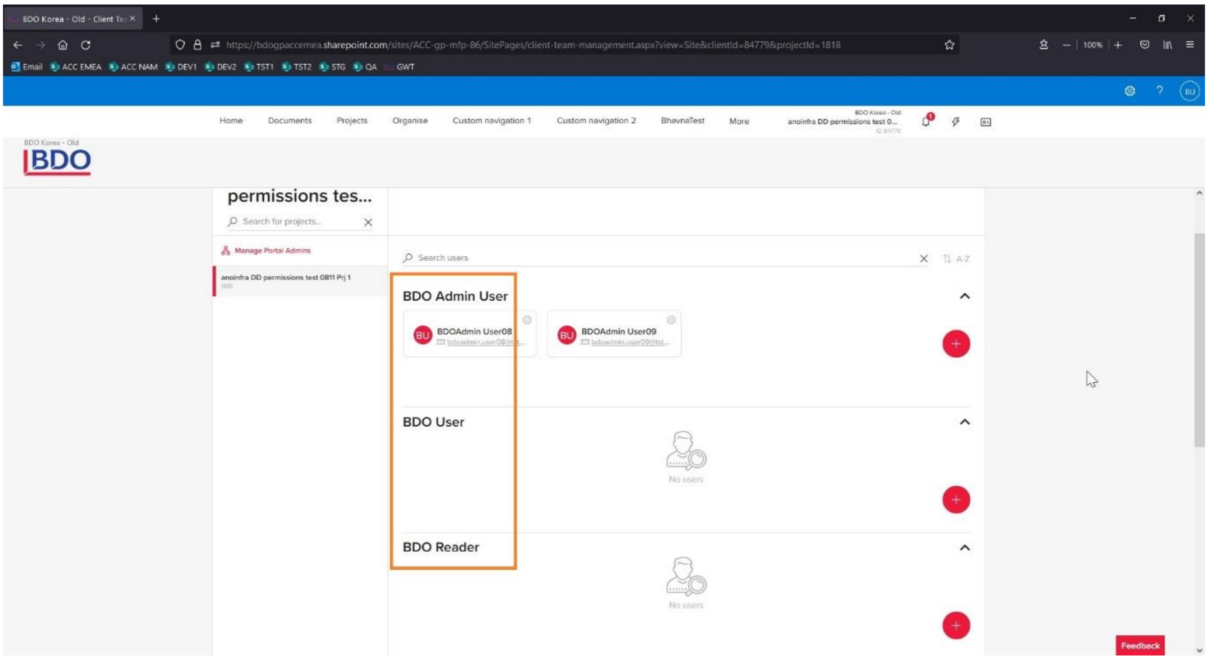
For the Alliance MF all mentions, images, and references of BDO are removed from the BDO Global Portal and are replaced with either generic BDO Global Portal branding or specific Alliance Firm branding where possible.

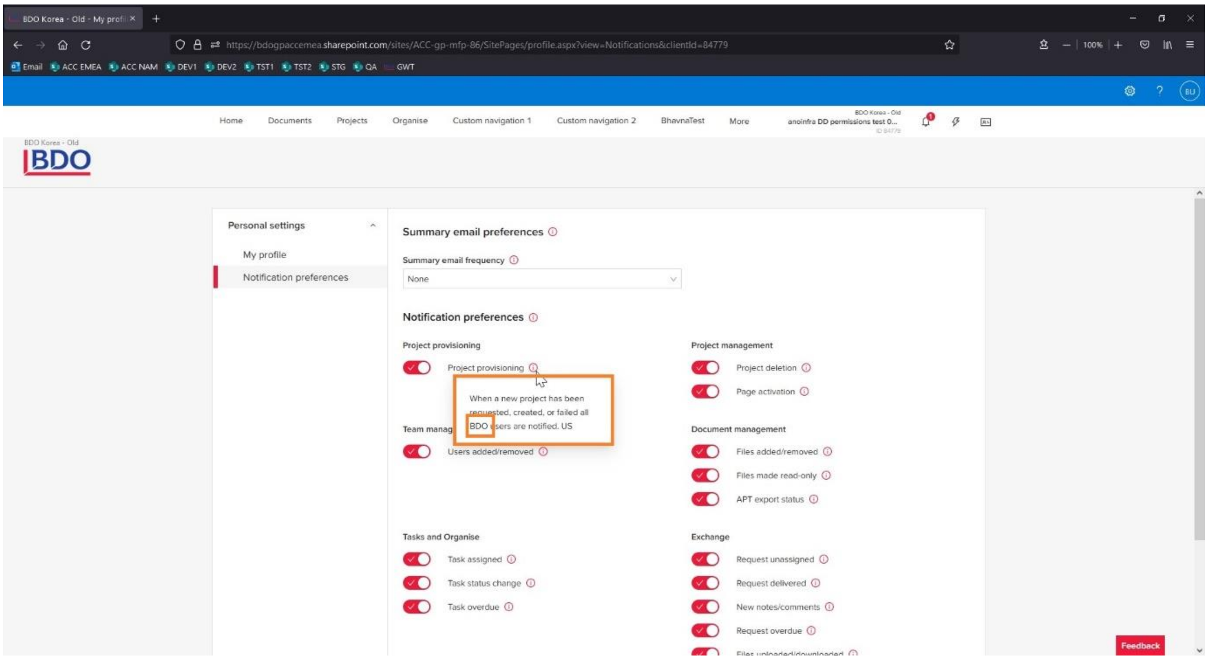
Branding is changed, but not limited to:

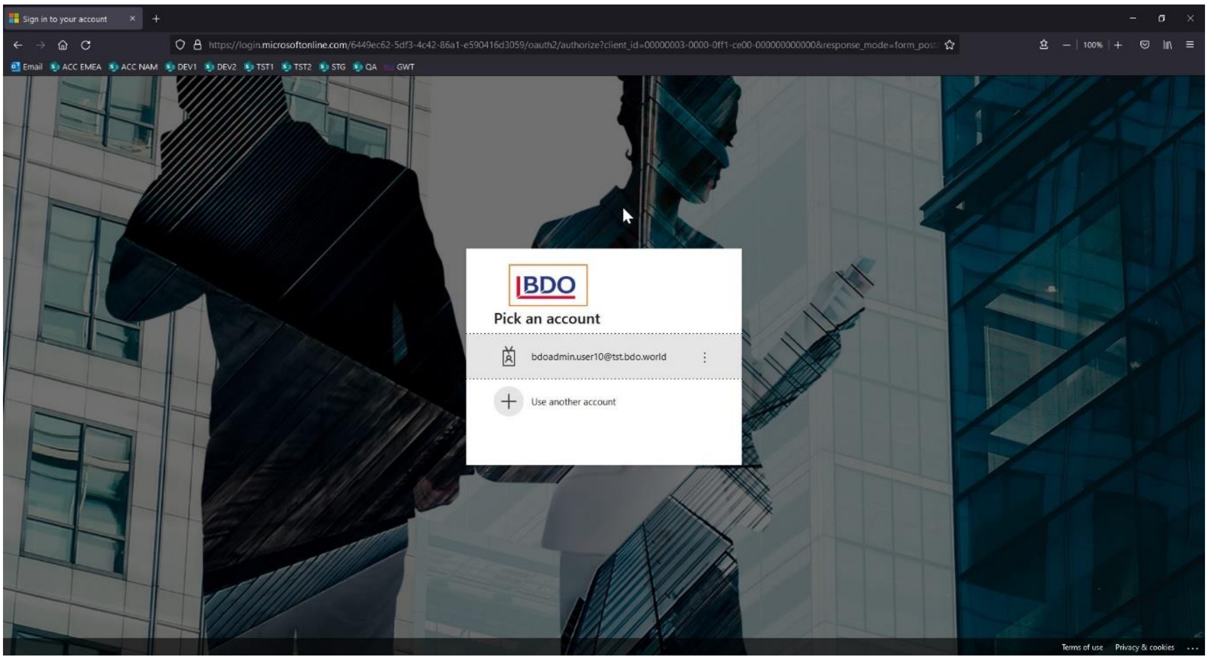
- Login Page
- Browser Tab Icon
- Client Select Screen
- Alternate Logo
- Client Home Screen
- Virtual Tour
- Notifications
- Project Wizard
- Project Batch Creation Templates
- Team Management
- My Profile
- Portal & Project Management
- Warnings/Confirmation Modals/Errors
- Admin Toolkit
- Email Notifications
- Portal Wizard
- Portal Batch Creation Templates

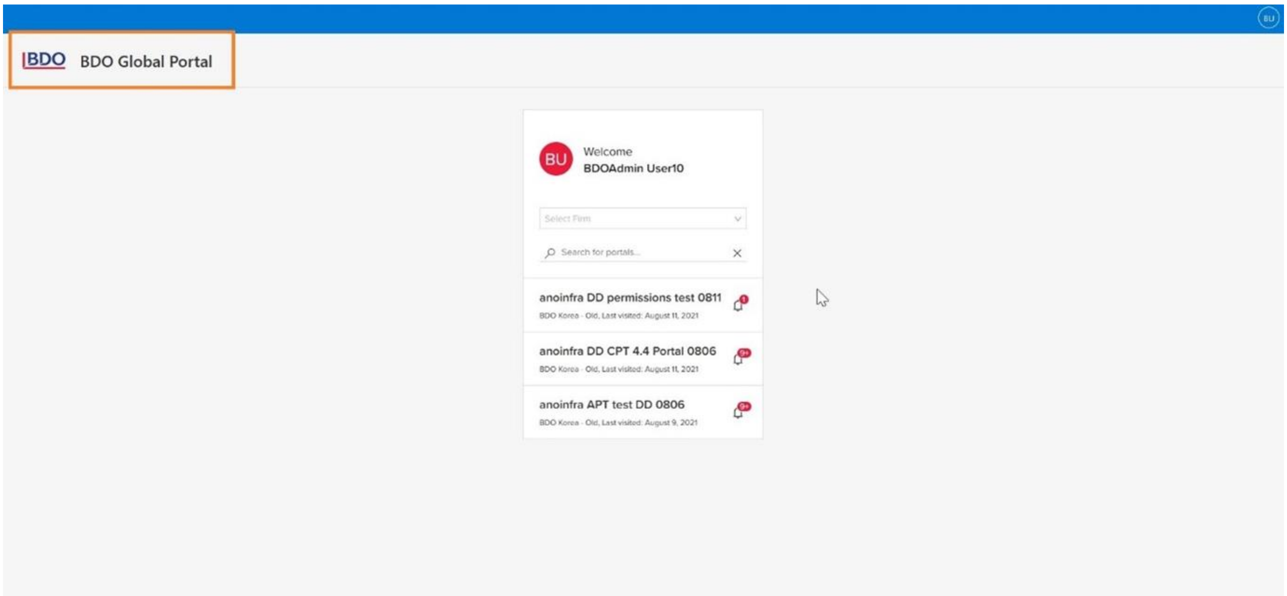
In places like these:



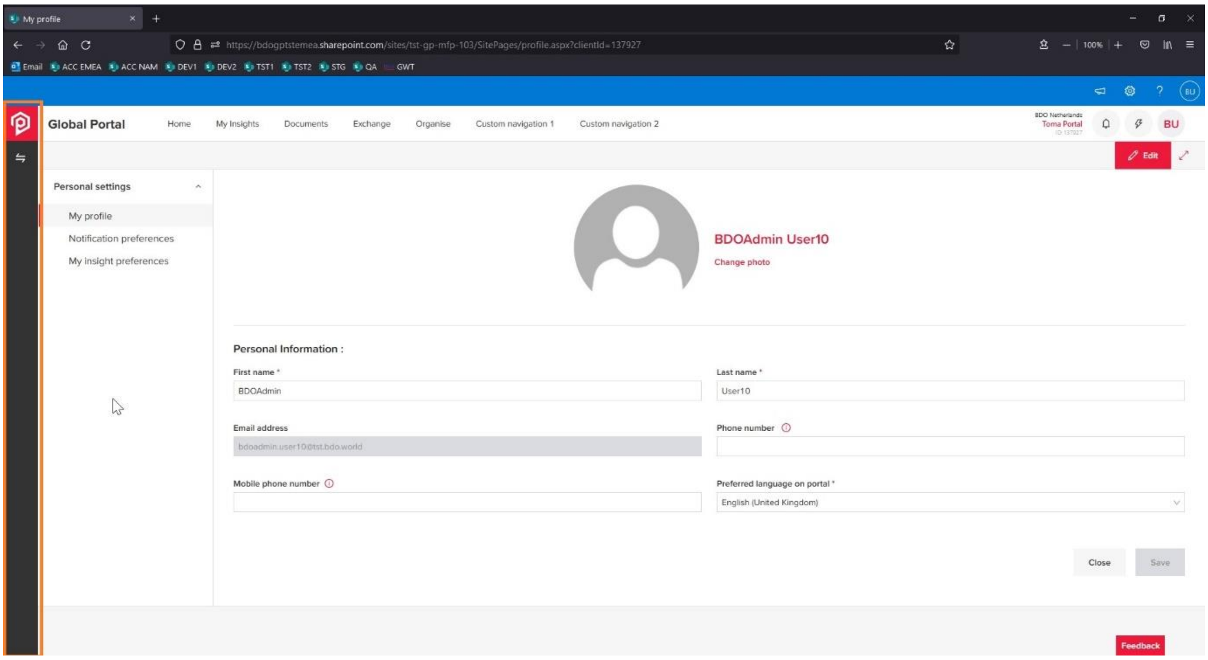

BDO Korea - Old
BDO
permissions tes...
Manage Portal Admins
BDO Admin User
BDOAdmin User08
BDOAdmin User09
BDO User
No users
BDO Reader
No users
Feedback


Personal settings
My profile
Notification preferences
Summary email preferences
Summary email frequency
None
Notification preferences
Project provisioning
When a new project has been requested, created, or failed all BDO users are notified. US
Project management
Project deletion
Page activation
Document management
Files added/removed
Files made read-only
APT export status
Users added/removed
Tasks and Organise
Task assigned
Task status change
Task overdue
Exchange
Request unassigned
Request delivered
New notes/comments
Request overdue
Feedback





Any mention or image of BDO is removed. It will be replaced by this logo or similar:



Items like the Twitter account and similar will need to be replaced manually. This is covered in a separate document: Alliance Firm Documentation. Also all "BDO" mentions in translations will need to be replaced manually by Member Firms.