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	Recently visited Client Name IDO Notivelients Client Name IDO Notivelients DO Notivelients Client Name IDO Notivelients Client Name IDO Notivelients Client Name IDO Notivelients	2 0 + 21 0 1 0 	1 m m m m m m

Hi, Welcome [Username] To your BDO Global Portal

The task overview shows all tasks that are assigned to or owned by you, their status and information are shown. Portal progress is displayed by the progress bors for pinned Portals in the left list, pin/unpin Portals to compare them.



Pinned Portal progress 💮

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Planed client	BDO Netherlands	s
Planed client	SDO Netherlands	s (
Fireburite client	BDO Netherlands	*
Pinned client	BDO Belgium	1
	and the second	

GLOBAL PORTAL

Client User Guide

6 December 2024



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DOCUMENT DETAILS

VERSION MANAGEMENT

Version	Date	Author	Nature of amendment			
1.0	June 2024	Maria Peicheva	Updated document based on Release 5.5			
2.0	November 2024	Maria Peicheva	Updated document based on Release 5.6			

REVIEWER

Name	Version	Date
Maria Peicheva	2.0	6 December 2024

INTENDED AUDIENCE

Target Audience	
BDO Clients	

1. ABOUT GLOBAL PORTAL

Global Portal is an online digital collaboration platform for BDO professionals to efficiently engage with their clients. It acts as a central, secure location where all engagement material and associated collateral can be stored and worked on by both clients and their BDO advisers. It is a key interface for BDO's digital client experience.

By working in partnership with Microsoft, an online collaboration space has been developed that allows BDO advisers and their clients to embark on a truly digital relationship that can last for a client's entire lifetime with BDO.

2. PORTAL LOGIN

2.1 Login via an email invitation

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

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



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

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

BDO
Sign in
R5.0ClientUser1@mail.com
Can't access your account?
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.

See an example of a one-time password email:

··· ···· ·····				
Your BDO O365 GP QA EMEA account verification code	Ē		2	ι
EDO 0365 GP QA EMEA (via Microsoft) (account-security-noreply@accountprotection.microsoft.com) To: you Details ✓	Fri, Oct 9,	2020 4	:36 pm	
BDO O365 GP QA EMEA				
Account verification code				
To access BDO O365 GP QA EMEA's apps and resources, please use the code below for account verification. The code 30 minutes.	will only v	work f	or	
Account verification code: 19904207				
If you didn't request a code, you can ignore this email.				

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

2.2 Login via the global landing page



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

Tip: Add <u>https://portal.bdo.global_to your bookmarks for quicker access.</u>

Please reach out to your BDO contact, if you experience any login difficulties.

2.3 Permissions prompt

When logging in to Global Portal for the first time, you will see a "Permission requested" prompt. This is a standard Microsoft message to inform you about the process of granting authorization to Global Portal to access protected resources on your behalf. For more information, please refer to the <u>Consent</u> experience for applications in <u>Microsoft Entra ID</u> article.



Press the **Accept** button to proceed with the login and start working with Global Portal.

Terms and conditions apply and can vary per jurisdiction. Upon successful login users will be prompted to accept Global Portal's Terms and Conditions. An example screenshot is provided below:



3. WELCOME PAGE

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

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

				(EE)
P	Select Portal	Global Portal		L ² 3
4	Search Portal ∨ Anoinfra 4.2 Smoke VB 7 ? BOO Kerse. Old 7 ? Harmony Analytics 0 ? BOO East Afrea	Hi, welcome Erika to your Global Por Dre Task Overview shows all tasks that are assign shown. Portal Progress is displayed by the progres Portals to compare them. Task status O Clear filter &	Edwards tal med to or owned by you, their status and information are ss bars for pinned portals in the left list, pin/unpin Tasks ① Status * Task title * Due date * Portal * List of Survey Q Sep 15, 2023 Roadshow 5.3 List of Survey Questions Sep 22, 2023 Roadshow 5.3 Survey Questions Sep 22, 2023 Roadshow 0.4 2	Project
		Pinned Portals progress Portal Porta	Tasks Progress ()	⊟ Legend マ

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

You can navigate back to the Welcome page by clicking the red Global Portal logo in the left upper



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

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

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



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

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

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

3.1 Tasks status dashboard

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



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

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

3.2 Tasks dashboard

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

```
Owned \stackrel{\frown}{\sim} or Assigned \stackrel{\frown}{\Box} .
```

Click a Task name to open the task.

Та	asks 🛈										
	Status 🌲	Task title 🌲	Due date	÷	Portal	*	Project 🜲	Туре	÷	Role	\bigtriangledown
	•	2023 Change Man	Sep 30, 2023		BDO Portal Busine		Change Managem	?		ŕ,	
	•	2023 Change Man	Nov 30, 2023		BDO Portal Busine		Change Managem	?		Ĉ	
	•	Trial Balance	Jun 25, 2024		Anoinfra 4.2 Smok		Audit 12 31 2023	e		<u>/</u>	
	•	USA Tax Return	Jun 25, 2024		Anoinfra 4.2 Smok		Audit 12 31 2023	é.		<i>?</i> ≞	
	•	Task7			Anoinfra 4.2 Smok		Sundowning	Ee		<u>A</u>	
	•	2023 Change Man 2023 Change Man Trial Balance USA Tax Return Task7	Sep 30, 2023 Nov 30, 2023 Jun 25, 2024 Jun 25, 2024		BDO Portal Busine BDO Portal Busine Anoinfra 4.2 Smok Anoinfra 4.2 Smok Anoinfra 4.2 Smok	•	Change Managem Change Managem Audit 12 31 2023 Audit 12 31 2023 Sundowning	 ? ?		[] [] & & & &	

3.3 Pinned Portals dashboard

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

P	inned Portals progress 0						
	Portal	Member firm	‡ Tasks	Progress ()			🗄 Legend 👻
	donotremove API January 2022 02 07 Lucky Portal	BDO Mauritius & Co.,		78			
	ZivileMauricijuje	BDO Mauritius & Co.,		41			
	B Test Portal Demo DD Rename 0305	BDO Mauritius & Co.,		18			
	Justo Portalas nr.2	BDO Mauritius & Co.,		13			
	Anoinfra VL 01.18 MAUR	BDO Mauritius & Co.,		4			

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

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

4. PORTAL HOME PAGE

J [A] El https://bdogpaccemea.sharepoint.o	Vaites/acc-gp-mtp-86?clientId=83906		≪ A Ω Ψ € ⊕ •
BDO Global Portal Home Insights	Documents. Exchange Next Gen TOMM		No Store Con Analistia 4.2 Sinaki VB O STOR
	Welcome Webpart new NG	BDO Contacts	
	My tasks O Clear filter	g Evaldas Petrauskas 🗞 😕	
	Status Title ♥ Due date 10 Project ♥ ● Tital Balance Jun 25, 2024 Audt 12 31 2023 ● USA Tas Return Jun 25, 2024 Audt 12 31 2023 ● USA Tas Return Jun 25, 2024 Audt 12 31 2023 ● Tital Balance Jun 25, 2024 Audt 12 31 2023	Insights	
	E Legend	Contraction of the second s	
	Quicklinks		
		16 May 2024 : Test 7.2.2 fix	
	management Gen my proline	PREVIOUS NEXT	
		SEE ALL INSIGHTS >	

4.1 Black sidebar icons

Under the red Global Portal logo in the upper left corner of the screen you can find the search button

Pressing the magnifying glass icon opens the black sidebar where you can search for *Files in Documents* and *Tasks in Exchange Next Gen*.

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

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

	How was your experience using BDO Global Portal	
	***	e
	Feedback message	
	0 / 500	
<i>ъ</i>	Feedback Cancel Send	

4.2 Main navigation menu

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

1. Links: Home, My Insights, Documents, Exchange Next Gen, custom links



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



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



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

	BDO East Africa BDO Portal Business Team ID 4288
Notifications ()	Options :
Maria Meta added to PR1 -	Mark all as read
BDOAdmin User07 remove	Notification preferences
EM0902 - anoinfra IP Porte	Expand notifications
Document Approved.docx anoinfra IP Portal EM0902	has been uploaded -

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



Click the **Profile photo circle** icon to access your **Personal settings**, revisit **Virtual tour**, **Coaching**, **Terms and Conditions** or **Log out**. Please note that this menu is customizable, so the options you see might vary.

4.3 Welcome webpart and BDO Contacts

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

4.4 Home page dashboard

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



4.5 Quicklinks

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



4.6 Insights

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

5. GETTING STARTED WITH DOCUMENTS

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

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

5.1 Documents structure

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

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



Note: Client users cannot upload files on the portal level. If you need to upload files, please browse to the corresponding folder or subfolder.

5.2 Upload a document

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

P	BDO Global Portal	Home	Insights Documents Exchange Next Gen TOMM Aneirfra	IDO Kores - Old I.2 Smoke VB ID 19908
4	Q Search for projects		DOCUMENTS	
۹	V 🕍 Client Portal documents	0	Audit 12 31 2023 Filters	
	🗸 📋 Audit 12 31 2023	٥	Search files Q Filter document type v Uploaded by	* 2
	Exchange Next Gen		Select all Delete 🕤 Move 🎝 Sort 13	Download 🛓 🛛 Add 🕥
	BDO USA Deliverables		Exchange Next Gen Uploaded June 27, 2024 (57 PM	Ep Create a new folder
	~ 📒 USA Tax Return			Upload files Upload folder
	Uploads			

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

5.2.1 File upload limits

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

It is not recommended to upload more than 5000 files or folders into a single folder.

Currently supported file types:

.pdf,jpg,.png,.gif,.zip,.rar,.txt,.doc,.xls,.ppt,.docx,.xlsx,.pptx,.gme,.eml,.msg,.vsd,.vsdx,.html,.xsl,.xml,.previe w,.xslt,jpeg,.xlsm,.htm,.docm,.xps, .mp4,.7z,.log,.xlm,.pptm,.zipx,.csv, .qbw, .qgw, .qba, .qbb, .qbm, .qbx, .sdb, .sdw, .sai, .saj, .abk, .aga, .agacc, .agaccbackup, .agacctransfer, .agex, .agexbackup, .agextransfer, .qdf, .sie, .se

While uploading a document, you can continue working with other files.

5.2.2 Characters support in file names

- English alphabet is supported
- Norwegian alphabet is supported
- Hebrew alphabet is supported
- File names cannot contain any of the special characters: " * : < > ? / \setminus ~ |. If the upload contains the characters, an error message is displayed and it is not possible to proceed.

• Each document name must be unique per the parent folder. A validation message is displayed if a duplicate named file is uploaded.

• A Document name must be between 1 and 100 characters.

5.3 Manage access to a document

5.3.1 Read-only

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

|--|

5.3.2 Manage Access

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

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

Uploaded April 16, 2021 2:23 PM	0
	Move
	Edit name
	Download
	Delete
	Manage access
	Set notification

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

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

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

Manage access O	×
Selected folder FOLDER D	
Restriction options No restriction Assign access	
Assign access only to	
BDOAdmin User02 ×	
BDO User01 - bdo.user01@tst.bdo.world	

ocx	Access restricted

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

5.4 Edit a document

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

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

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

button

Delete 🗊	Move 🕤	Sort ↑↓	Download \downarrow	Add 🕀
				() :
			Copy link addres	s
			Edit name	
			Move	
			Download	
			Delete	

5.4.1 Delete files and folders

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

		DOCUMENTS > RECENTLY DELETED	
> 📄 VAT 2021 Q2	ß	VAT 2021 Q4	
> 🗎 VAT 2021 Q3	۵	Recently deleted documents 🕕	
VAT 2021 Q4	٥	Type \bigtriangledown Name	Q Location
		User guides	VAT 2021 Q4/Docs
		BDO Global Portal - Solution Archit	ecture-5.11 VAT 2021 Q4/Docs
Tasks			

5.5 Documents & Tasks

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



5.6 Search documents



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

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

5.7 Breadcrumbs (file paths)

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



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

6. TASKS AND EXCHANGE NEXT GEN

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

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

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



6.1 Status dashboard

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

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

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

6.2 Task type dashboard

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

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

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

6.3 Project progress dashboard

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



Not started

exchange next gen 5.5 rp			$\overline{\tau}$	U
View Overview List Calendar	Filters ① Status ~ Type	✓ Assignee ✓	Due date 🖻 Follow 🗸	Tx .
Not started 0pen Rejected Overdue	119	 Survey Action Milestone Signing Approval Request item Cooperate 	Welcome to Exchange Next Gen Exchange Next Gen is the centralised hub for all your collaboration between Client and BDO.	
Project Progress				
Projects	Tasks Progress		🗄 Legend	1 - 1
next pro	79 40			

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

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

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

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

- on the left side of the pills are showing count of total tasks within selected type
- hovering shows only that type of status statistics
- 5. Sorting is not affected
- 6. User can sort filtered results

6.4 Dashboard Filters

Filters 🛈									
Status	\sim	Туре	\sim	Assignee	\sim	Due date	 Follow	~	₩

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

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

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

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

6.5 List view

Click the List button to display tasks in a table.

Insig	ights	Documen	ts Ex	change Next Gen TC	MM Cus	tom navigation 2						BDO Korea - O KB Korea Portal 11 0 ID 8650	6 9 7	
EXC	CHANGI	e next gen Drea P	Portal	11 08									Ŧ	C
Vie	ew			Filters 🤇)									
	Overvi	ew Li	st C	Calendar Status	\sim	Туре 🗸	Assignee 🗸	Due da	ite 🗊	Follow	~ Tx			
Tas	sks E	idit view 🖩	Clear	filter 📡								Edit 🧷	Download \downarrow	
		Status 🌲	Index 🌲	Title C	ک Project	∀ Task group	✓ Due date		Actions	√ Entity	\bigtriangledown Period end	∀ Other grou ∀ Loc	ation 🖓 Assi	gı
		•	1	Signing task	-	Grupe	Nov 8, 2022	D					BU	
		•	1	Approval task	-	Grupe	Nov 8, 2022	6			-		BU	
		•	3	Signing task 2	-	Grupe	Nov 8, 2022				-		BU	
		•	3	Approval task 2	-	Grupe	Nov 8, 2022	6			-		BU	
		•	5	Appprove		Grupe	Nov 8, 2022	6					CU	
		•	6	Grupe	-	Grupe	Nov 10, 2022	D					BU	
		•	7	Taskas pachekinimui	-	Grupe	Nov 10, 2022	6					BU	
		•	8	Be grupes	-		Nov 10, 2022						BU	

The columns in the table are:

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

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

Tasks Edit view 🐺 Clear filter 🔀

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

me	Insights	Docu	iments	Exchange Next Ger	томм	Custom navigation 2	
					List view	preferences ()	
	KB F	Korea	Port	al 11 08	List layout		
	View				Regular	Compact	
	Over	rview	List	Cirendar	Column cor	nfiguration	1
			_		II ()	Status	
	Tasks	Edit viev	N 🗗 🤇	ar filter 🔀		Index	
			_			Title	
		Status	⊊ Index	⊊ Title	# O	Description	
			1	Signing task	# C	Project ()	
			1	Approval ta	# C	Task group	
			3	Signing task	# D	Start date	
			3	Approval ta	# ()	Due date	
			5	Appprove	# C	Туре	
			6	Grupe	# C	Actions	
			/	Taskas paci	II 💽	Entity	
		•	8	Be grupes	# C	Period end	
					# C	Other grouping	
					# C	Location	
					H 🌔	Assignees	
					# O	Owner	
					# ()	Access	
					Reset defa	ult Cancel Save	

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

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

6.6 Calendar view

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



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

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

7. TASK TYPES

There are the following types of tasks:

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

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

K Hide project list		
Q Search for projects	EXCHANGE NEXT GEN > 5.5 RP > NEX	KT > ALL TASKS
Group tasks by 🗡 🧻	203 Action	
✓ ■ All tasks	Open Action 🕞 Start June	20, 2024 🕞 Due June 29, 2024 🖉 🤁 🕕 🕏 Following
• 2.1 Survey not assigned to me	Description	Comments (0)
• 2.2 Survey not assigned to me	test	Type comment here
• 3 Survey not assigned to me		
4 RI not assigned to me		
6 descriptiondescriptionde		No comments yet
11 Request item	> Expand more task data	
🔹 🌑 203 Action		
a) add Survey assigned to me		
B. Group Auditor	X Close	X Reject Complete

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

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

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

< Hide project list	
Q Search for projects	EXCHANGE NEXT GEN \rightarrow EVA DEMO PORTAL \rightarrow ANOTHER \rightarrow 500 TASKS
Group tasks by 👻 🚺	+ Task 170
🕍 Eva demo Portal	● Overdue Action ⓒ Start February 13, 2023 🔓 Due November 10, 2023 g ^Q _# No assignees
> 🔛 Client portal tasks	Description
 Another 	Lorem ipsum dolor sit amet, consectetuer adipiscing elit. Maecenas portitor congue massa. Fusce posuere, magna sed pulvinar ultricies, purus lectus malesuada libero. Pellentesque habitant morbi tristique senectus et
 S00 tasks 	netus et malesuada fames ac turpis egestas. Proin pharetra nonummy pede. Mauris et orci. Aenean nec lorem
🔵 + Task 170	

8. TASK ACTIONS

8.1 Provide an attachment to a Request Item

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

- 1. Only one-level folders can be added;
- 2. If a nested folder is added, the system displays a warning: "The uploaded folder contains sub folder(s), this is not permitted. A folder only containing files can be uploaded here."
- 3. Files cannot be added to the already uploaded folder;
- 4. Folders and files are displayed in a <u>file tree</u>.
- Allowed file extensions depend on each Tenant setting. Reach out to your BDO contact if you need to upload a file that has a different extension than the ones listed in 5.2.1File upload limits
- 6. File size restriction applies the same as files in Documents (2GB).
- 7. If more than 8 files are uploaded, a scroll bar appears.
- 8. All files can be downloaded at once on **Download all** button. Files are zipped.

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

8.2 Download Request Item files

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

Filters 🛈									Download	documents of Requ
Status	\sim	Туре	✓ Assign	iee	\sim	Due dat	e 📰	Foll	results or	Reports
		Joican	UA							
~	Status 🌲	Index 🌲	Task title	Q	Project	7	Task group	\bigtriangledown	Selecte	d task files
✓	Status 🗘	Index 🌲	Task title RI task Overdue	Q	Project 001	Ţ	Task group RI group	7	Du Selecte Selecte De	d task files d survey results
V V	Status 🗘	Index * 19 3	Task title RI task Overdue Team survey	Q	Project 001 001	Ţ	Task group RI group 1	Ţ	Du Selecte De Report f	d task files d survey results for selected tasks
N N N N N	Status 🗘	Index * 19 3 10	Task title RI task Overdue Team survey Action Overdue	Q	Project 001 001 001	V	Task group RI group 1 Action group	V	De Selecte De Report f De,	d task files d survey results for selected tasks
y y y y	Status 🗘	Index \$ 19 3 10 3 30	Task title RI task Overdue Team survey Action Overdue Coop Overdue	Q	Project 001 001 001 001	V	Task group RI group 1 Action group Coop group	∇	De Report 1 De 7, 2023 Dec 8, 2023	d task files d survey results for selected tasks 3

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

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

BDO Global Portal	iome My Ins	ights Documer	nts Projects	Exchange Next Gen	Custom Menu 1	Custom Menu 2	More	EDO I Ge	fauritius & Co. abijaPortal6 ID 207468	e i	3
< Hide project II	ut										
Q Search for projects	EXCH	ANGE NEXT GEN	c					_		¥	O
Group tasks by 👻 🕕	Ga	bijaPortai	0								
🔛 GabijaPortal6	View			Filters 0					Request an	i files troi i Coopera	n all Project's ate tasks
> 🕍 Client portal tasks	•	erview List	Calendar	Status 🗸	Type 🗸 🗸	Assignee 🗸 🗸	Due date	E Follow	~	Tr.	

8.3 Actions

You can perform the following actions with all tasks:

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



8.3.1 Flag a task

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

Group Tasks by flag:

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

8.3.2 Follow a task

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

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



8.3.3 Edit assignees and access

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

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

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

EXCHANGE NEXT GEN Action task Open Action	 > ANOINFRA IP PORTAL SEGA > PROJECT 2 BATC i Due 19 November 2022 A^R_B No assignee. 	H > ACTION TASKS	Options Flag task Edit assignees and access	Edit assignees and manage access Assign users to this task	~
Description	The description	Comments (0) Type comment here	Download report	Add assignees ① Enter or select a user Manage access to the task	
	no usupuur	() No co	mments yet	Cancel	Confirm
> Expand more task da	ta				
× Close			× Reject ✓ Complete		

You can add/delete yourself and other Client-side users in the Assignees field. Client-side users do not have the ability to manage BDO users.

You cannot make a task restricted/unrestricted (enable/disable manage access toggle), you can only add/remove client-side users from the manage access list that were added by BDO-side users.

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

equest item Open Request item 🕞 Due 30 Nov	ember 2022 g ^e 🔍	Flog ter	sk signees and access	Assign users to this tosk Add assignees
Description		Downic	ed report	BDO User05 - bdo.user050tst.bdo.world X BDO User06 - bdo.user060tst.bdo.world X Client dumin Admin05 - clientdomin.user0 X Client User05 - client.user050tst.bdo.world X
Templates (2) 🔘	No des	cription	⊥ Download all	Manage access to the task Allow task access only to
Payment.xlsx	* @	Portal &worksheet.docx	1	BDO Admin User 05 - bdoadmin.user059t × BDO User05 - bdo.user059tstb.dbaverld × BDO User06 - bdo.user069tstb.dbaverld × ● Client Admin 05 - client.user059tstb.dbo.world × ↓
Drop files here		Type comment here	A	Client User08 - client user0905tbdoworld Client User07 - client user0905tbdoworld Client User088 - client user0895tbdoworld Client User090 - client user0905tbdoworld
		No comments yet		Client User10 - client.user10@stsbdoworld ClientAdmin User06 - clientadmin.user06@stsbdo clientadmin user07 - clientadmin.user07@tstbdo dlientadmin user07 - clientadmin.user07@tstbdo

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

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

ïew										
Overvie	ew Li	st C	Calendar							
ilters 🫈)									
Status	\sim	Туре	\sim	Assignee	∨ Due da	ate 📼	Follow 🗸	\		
asks US	Edit vie	w 🗊 C	lear filter 🔀						Edit 🧷	Download
	Status 🛔	Index 4	Task title	Q	Project 🗸	Task group	✓ Due date ≜	Manag Type =	e access	nity 🖓 I
	•	503	opentask2	- 1	GabijaProject	Taskgroup1	May 24, 2024	4		ing q
~	•	504	Open Task		GabijaProject	Taskgroup1	May 24, 2024			
~	•	505	In Progress		GabijaProject	Taskgroup1	May 24, 2024	0-0		
_										
\checkmark		506	Completed		GabijaProject	Taskgroup1	May 24, 2024		🏘 -	

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

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

	Assignees 🛈	58 (
\sim	Apply to all	
~	Select assignees	Cancel 😨 Replace 🕂 Add

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

8.3.4 Download Task status change report

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

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

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

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



		List		Cal	endar							
ilters (D											Download documents of Reque
Status		\sim	Тур	е	\sim	Assignee	\sim	Due	e date		Foll	results or Reports
asks U	S Edit	viev	/ 野	Cle	ar filter 📡		Expo	ort ⊢>		Delete 🗊	E	Edit 🖉 Download 🛓
asks U	S Edit	viev	≠野	Cle	ar filter 🖓		Expo	ort ⊢>		Delete 🔟	E	Edit
asks U	S Edit Status	viev	v ₽ Index	Cle	ar filter 📡 Task title	C	Expo Q Task g	ort ⊢> roup	\bigtriangledown	Delete 🔟 Due date	E	Edit Ø Download 🛓
äsks U	S Edit Status	viev	Index	Cle	Task title	C	Expo Q Task g Taskgr	ort ⊢> roup oup1	V	Delete 🗊 Due date May 24, 202	E • 4	Edit 🖉 Download 🛓 Selected task files Selected survey results



8.3.4.1 Download survey results

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

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

P	BDO Global Portal Ho	Imes My Insights Documents Projects Exchange Next Gen More PortaCober3 0 9 CO
⇔	K Hide project list	
-	Q Search for projects	EXCHANGE NEXT GEN > PORTALOCTOBER3 > PRO > 500 TASKS
Q	Group tasks by 🗸 🕧	501 Survey 1 Flag task
	Y 🔛 PortalOctober3	💿 Open Survey 💿 Start October 3, 2023 🕞 Due October 3, 2023 🖧 💽 Edit assignees and access
	> 🥁 Client portal tasks	Task status change report Download >
	Y 📓 Pro	test Supervised to the second
	Y 🖿 500 tasks	Survey
	🔵 1 Task 1	1. How is your day?
	2 Task 2	The best
	3 Task 3	2. What was first thing you did today at work?
	4 Task 4	O Welcomed colleage
	5 Task 5	Opened the laptop
	6 Task 6	3. What is your work environment?
	7 Task 7	Enter answer
	8 Task 8	4. What is your goal? How can you fill in your goal into daily routine?
	9 Task 9	O What is your most important goal this week?
	10 Task 10	5. When you want to finish your goals
	11 Task 11	Most ambitious goal ends:
	12 Task 12	
	13 Task 13	Great work!
	14 Task 14	
	15 Task 15	> Expand comments (0)
	16 Task 16	> Expand more task data
	17 Task 17	,
	18 Task 18	
8	19 Task 19	Close Save as draft Send answers

8.3.4.2 Download selected survey results

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

/iew		Filt	ters 🛈									
Overview	List	Calendar	Status	∨ Ty	pe	~ A	ssignee	\sim	Due dat	e 📰	Follow	~ \
Fasks US <mark>Edit</mark>	view 🗊	Clear filter 🔀									E	Edit 🖉 Download 🛓
✓ Status	🛊 Index	🜲 Task title	Q	Task group	\bigtriangledown	Due date	🔹 Туре	‡ A	ctions S	7 Entity	Ţ P	Selected task files
	12.1	indv surv		Taskgroup1		Aug 28, 2023	?	-		-	-	Selected survey results
	12.2	indv surv		Taskgroup1		Aug 28, 2023	?	-		-	-	Report for selected tasks
	12.3	indv surv		Taskgroup1		Aug 28, 2023	2	-		-	-	
	12.4	indv surv		Taskgroup1		Aug 28, 2023	[7]	-		-	-	

8.4 Answer a Survey task with branching

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

8.5 Related Team Survey tasks

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

Users can overview 3 sets of tasks:

- **Related tasks** tab in the modal is opened when the link "Set of tasks" is clicked from any task that was created from linked template of delivered Team Survey.
- **Subtasks** tab in the modal is opened when the link "Set of tasks" is clicked from initial (root) Team Survey overview page.
- **Individual surveys** tab in the modal is opened when the link "Set of tasks" is clicked from any Individual survey overview page, if more than 1 assignee is added during task creation.
- **Note:** The same task can be displayed in 2 lists, e.g. Related tasks and Individual surveys or Related tasks and Subtasks.

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

Linked	tasks												×
Relate	Related tasks Subtasks Individual surveys												
List displa	t displays current task as a root survey (marked with a crown icon), along with tasks created from it's template(s)												
Tasks U	IS Clear f	ilter 📡										Edit 0	Download ±
	Status 🌻	Index 🌲	Task title	V Description	Q Task group	V Due date	🗧 Туре	🗘 Actions 🖓	Entity 🖓	Period end	Other group 🖓	Location 🖓	Assigned to
	•	1	Cooperate		dd	Dec 12, 2023	d ^a		Vilnius	Dec 20, 2023	Vilnius	Vilnius	80
	•	2	Request Item	-	dd	Dec 12, 2023	Do		Vilnius	Dec 21, 2023	Vilnius	Vilnius	BU
	•	3	Milestone		dd	Dec 12, 2023	\oplus		Vilnius	Dec 22, 2023	Vilnius	Vilnius	
	•	4	Action		dd	Dec 12, 2023	Ģ		Vilnius	Dec 23, 2023	Vilnius	Vilnius	BU
	•	1	Survey	-	dd	Jun 14, 2024							BU
													Cancel

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

9. DOCUMENTS ACTIONS

9.1 Signing and Approval tasks

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

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

BDO Global Portal: Signing Task available for signing							
no-reply-acc-nam@portal.bdo.global	← Reply ← Reply All → Forward 🛍 …						
To Outsine Mallackal FridZyZa fridZ							
(BDO		BDO U	Inited States				
Signing notificat	tion PO	RTAL					
Dear Justin Kallickal, you have a document to	sign in you	r BDO Global	Portal				
Signing Task Is available for you to sign now BDO Onboarding Completed Tasks>BDO Study BSO>Sign	ning Task	Go to	task				
This email was sent to jkallckal@bdo.com . This is a system n to your engagement with us; it is not a promotional email. privacy. Read BDO United States [[otice related BDO United S privacy policy	to updated acti tates is commit }}.	ons relevant ied to your				

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



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

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

ORGANISE > ANOINFRA IP ORGANIS Signing task Open Signature 🔂 Due	E PORTAL > 2 PROJECT > SIGNIN	3				© Options X
Description Signing task for signing. File for signing Business document.docx			\pm	Comments Add comment		
V COLLAPSE TASK DATA						
BDOAdmin User05	Start date 15 May 2022 08:00	Location United States		Entity Chicago	Other grouping 2022	Period end 31 May 2022
X Close						Sign or decline

ORGANISE > ANOINFRA IP ORGANISE Approval task Open Approval 🔀 Due 3	PORTAL > 2 PROJECT > APPROVAI 1 May 2022 ද_ භාලාදාන					Options	×
Description Approval task for approval.							
File for approval				Comments			
e Business document.docx			×	Pad comment			
V COLLAPSE TASK DATA							
BDOAdmin User05	Start date 15 May 2022 08:00	Location United States		Chicago	Other grouping 2022	Period end 31 May 2022	
X Close						X Reject V Com	plete

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

EXCHANGE NEXT GEN > BDO ONBOARDING COMPLETED TASKS	> BDO STUDY TAX > STATE		Options X
91 Signing Task Not started Signing Start February 2, 2024 To Take	Due February 23, 2024 ∣ 🖉	3 i = ↓ ◆ Following	
Description	no desc		
File(s) for signing	⊥ Download all	Comments (0)	
example testing document.pdf	Ŧ	Type comment here	A
> Expand more task data		No comments yet	
X Clase		③ Assignees prior to the current user have not signed or declined the task	Sign or decline

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

EXCHANGE NEXT GEN > BDO ONBOARDING COMPLETED TASKS > BDO STUDY B	350 > SIGNING TA	sk		Options X
Not started Signing (b) Start February 2, 2024 C Due February 29), 2024 g놀 <u>내</u>	🚳 😑 丨 🖗 Following		
Description	No desi	Tription		
File(s) for signing		Comments (0)		
example testing document.pdf	Ŧ	Type comment here	No comments yet	A
Expand more task data Close				Sign or decline

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

1	Redirection to DocuSign
	Upon completion you will be returned to Task overview page. A delay in task status update may occur for several minutes
	Cancel Continue

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

Please review the	e documents below.							FINISH	OTHER ACTIONS -
		€,	Q		ē	0			
START	DocuSign Envelope ID: FCE57FCA-FC8F-4333-8D4	B-BBD8E	E6BD8E4	0		DEMONS PROVIDE 999 3rd Av www.docu	TRATION DOCUMENT ONLY D BY DOCUSIGN ONLINE SI ve, Suite 1700 • Seattle • Was usign.com	GNING SERVICE hington 98104 • (20	06) 219-0200
	Best practice for smart templates								
	1) Write the name of the creator and purpose of template in Description								
								Sign ★ 2/2/2024	

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

P	BDO Global Portal	Home	Documents Projects Exchange Next Gen Analytics	BDO United States BDO Onboarding Completed Ta ID 89010	.	F O
与	+ New 🗸 😴 Promote	Page det	ails 🖬 Analytics	Published 4/20/2023 😢 Share	~ 0	Edit 🖉
۹	Q Search for projects		▼ ■ > EXCHANGE NEXT GEN > REVENUE > SIGN TEST			
			Sign test			
	V III Client Portal documents	۵	Filters			
	> BDO Study Audit	۵	Search files Q Filter document type ~	Uploaded by	<u> </u>	X
	> BDO Study BSO	۵	Select all	$Export\mapstoSort^{\uparrow\downarrow}$	Download	Ŧ
	 BDO Study Tax 	۵	5 Revenue			
	Exchange Next Gen		example testing document 20240202110816 signed off		-	
	> Expenses		Uploaded February 2, 2024 5:08 AM		(i)	÷
	Revenue		Kample testing document.pdf Uploaded February 2, 2024 5:07 AM		Ō	:
	Sign test					
	> 🖿 State					

9.2 Read-only/editable Request Item documents

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

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

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

All files in the Exchange Next Gen folder become read-only when a task gets status Delivered or Completed. Files that have a lock icon next to the title are read-only. The read-only status depends on the status of the Exchange Next Gen task (when it is Complete or Delivered).

9.3 Storing Request Item files to Documents

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

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

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

10. PERSONAL SETTINGS

When logging in Global Portal for the first time you will be prompted to set your personal preferences.

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



10.1 Step 1 – Set my contacts

Please fill in your contact details and click Continue.



10.2 Step 2 – Set my Insight preferences



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

All topics (default)

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

10.3 Step 3 – Set my Notification preferences



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

10.4 Step 4 – Set my Email preferences

Step 4 EMAIL PREFERENCES

Select the email frequency and topics that you would like to be notified about, from Followed tasks in Global Portal.

Summary email frequency 🕠			
Summary email is based on the notifications	preferences		
None	~		
Follow email settings 🕕			
Follow			
Select follow topics and the frequency of rec	eiving them		
Follow topics	Instant email	Daily email	
Task assigned 🛈	•	•	
Task status change 🚯	•	•	
Task overdue 🛈	•	•	
New comments ()	•	•	
		previous Let's	s get started

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

Summary email frequency () Summary email is based on the notifications preferences Daily List (Recommended) None Daily List (Recommended) Weekly Count

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

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

11. TEAM MANAGEMENT FOR CLIENT ADMINISTRATORS

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

Role	Team management	Assign tasks	Level
Client CP Admin	\checkmark	\checkmark	Portal
Client Project Admin	\checkmark	\checkmark	Project
Client Project User	×	\checkmark	Project
Client Project Reader	×	×	Project

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

11.1 Team management page

Click the **Team management** option under the lightning bolt icon ⁶ to load the page for managing access for users from your organization and then navigate to the desired project on the left.



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

BDO Global Portal	Home Insights Documents Exchange Next Gen TOMM	Ancientra 4.2 Simole VB
Q. Search for projects	Audit 12 31 2023	Tean nuragement
	Client Admin User	
		•
	Client User	
		•

11.2 Add users to a project

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

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

Add Client Admin Oser		
Project		
Audit 12 31 2023		
Add user 🛈		
	+	
ClientAdmin User01 - clientadmin.user01@	tst.bdo.world	Ī
	Cancel Add	

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

Invite new member	
Project	
Audit 12 31 2023	
First name	
Erika	
Edwards	
Email address *	
R5.0ClientUser1@mail.com	
	Back

11.3 Remove users from a project

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



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



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

11.4 Portal team management

P	BDO Global Portal Home	Insights Documents Exchange Next Gen TOMM Custom navigation 2		BDD Korea - Old Anoinfra 4.2 Smoke VB ID 83908	۵	₽ HW
≒	Q. Search for projects	TEAM MANAGEMENT				
	🖧 Manage Portal Admins	Anoinfra 4.2 Smoke VB				
	Audit 12 31 2023 7639	0 Search users X 14 A.7	Color reception 2 Image: Color reception			
	Pr1 9949					
	Proj 1 3089	BDO Admin User	Client Admin User			
	TomaProject1 0315 copy BA1 4976					
	Dar vienas projektas [Archived] 4587	BU Buckamin Useron (EP)	Hit of Warner Sr.5.0clentuser40mail.com			
	Proj 2 [Archived] 3830					
		*				

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

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

12. NEED FURTHER ASSISTANCE?

If you require further support to ensure the best possible Global Portal experience, please reach out to your BDO contact.