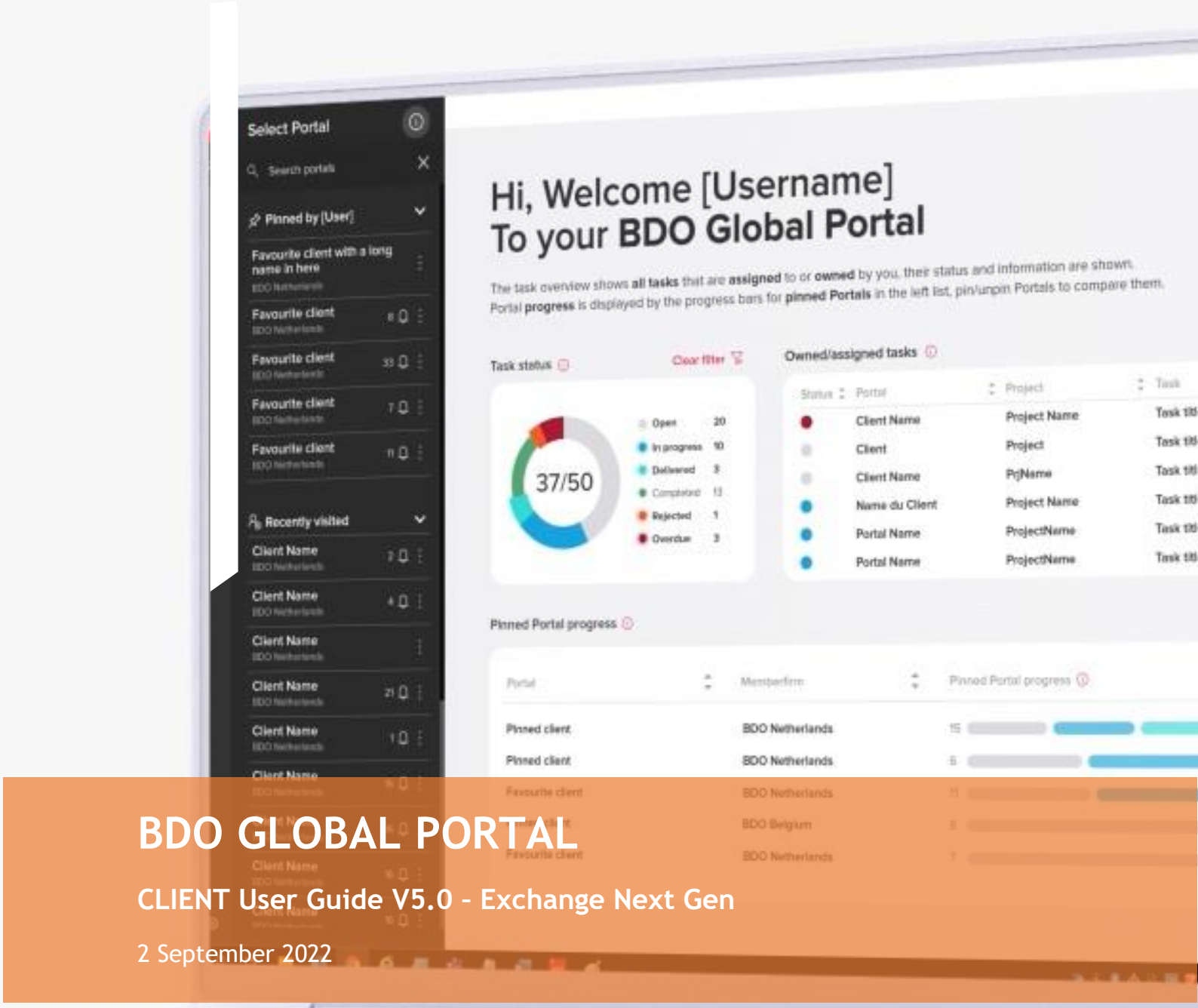


# BDO GLOBAL PORTAL

## CLIENT User Guide V5.0 - Exchange Next Gen

2 September 2022

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# DOCUMENT DETAILS

## VERSION MANAGEMENT

| Version | Date | Author | Nature of amendment |
|---|---|---|---|
| 1.0 | September 2022 | Karolina Mala | Updated document based on 5.0 RN |

## REVIEWER

| Name | Version | Date |
|---|---|---|
| Karolina Mala | 4.1 | 2 September 2022 |
| | | |

## INTENDED AUDIENCE

| Target Audience |
|---|
| BDO Global Portal project team |
| BDO firm users |
| Vendors for further development of the BDO Global Portal |
| ServiceDesk |
| Support team |

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# INTRODUCTION AND HOW TO USE THIS DOCUMENT

This document gives an overview of the functionality of BDO Global Portal from the BDO and Client point of view.

The information is applicable to BDO Global Portal release 5.0. Technical details are not described.

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

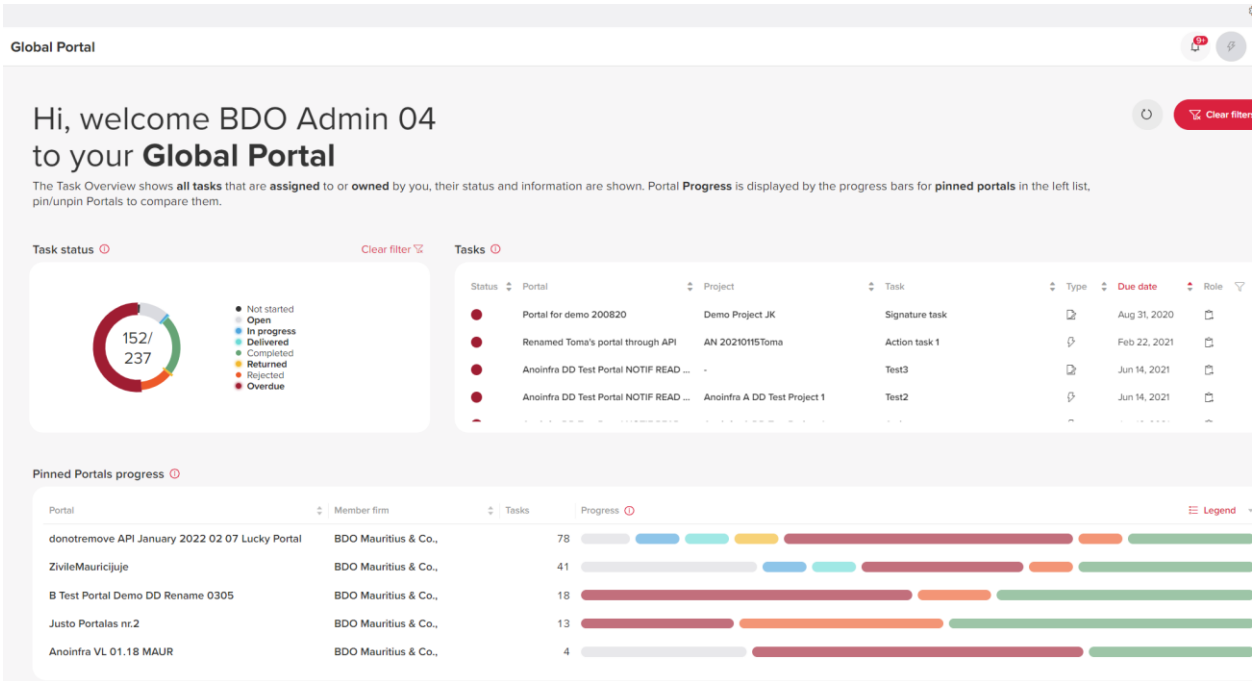
# 1. WELCOME PAGE

## 1.1 PORTAL OVERVIEW DASHBOARD

If users have an access to one Client Portal only, they will not be able to see the Welcome page dashboards. Although the Welcome page is loading, an empty dashboards are seen for a second but then the user will be redirected straight to that Client Portal home page.

In case that the user is assigned to more than one Portal, they will see this information in the Welcome page:

1. Welcome text.
2. Message text.
3. Task Status dashboard.
4. Tasks dashboard.
5. Pinned Portals Dashboard




In case there are no Portals pinned, the dashboards will stay empty, unless the user pins at least one Client Portal.

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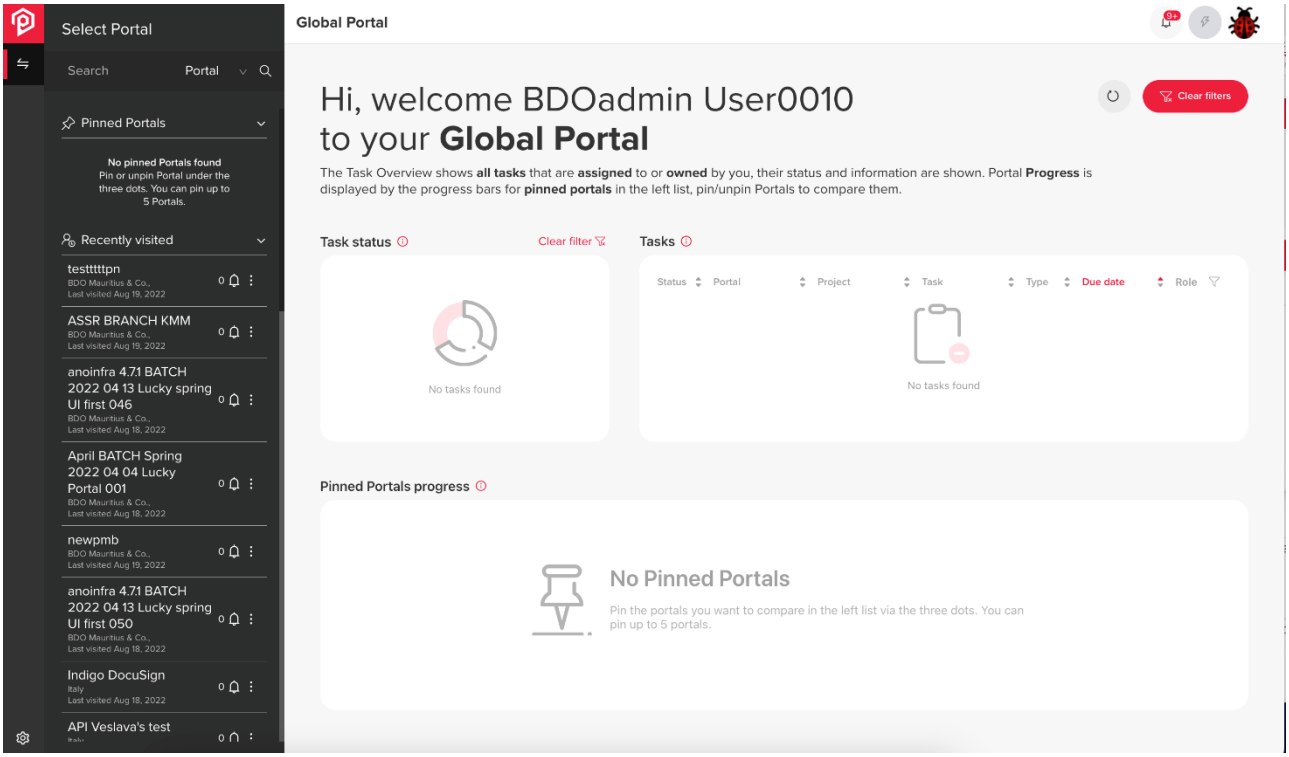
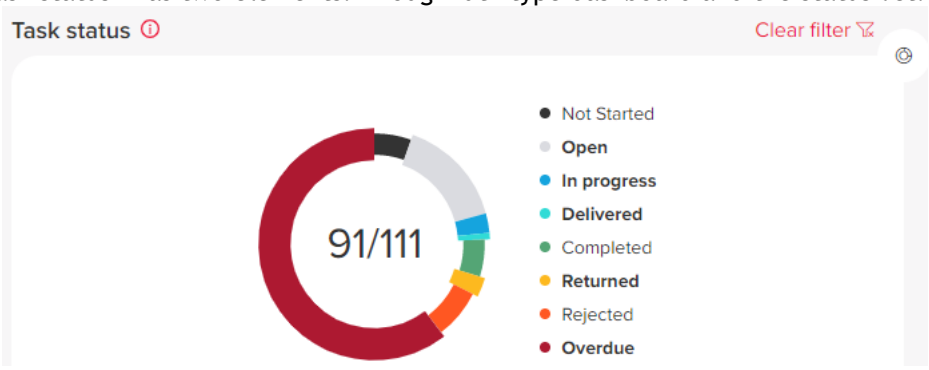



## 1.1.1 Tasks Status Dashboard

Dashboards will show only available statuses for a user, e.g., if user has only tasks in statuses "Open" and "Overdue", dashboard will show only 2 statuses in total. If user has only task in status “Completed”, dashboard will show only one status in total.

Dashboard “Task status” has two elements: “Doughnut” type dashboard and the status list.




“Doughnut” shows available statuses and is divided in pieces with different colors and the selections shows:

- task count of selected statuses / total of tasks (e.g., 37/50)
- in case nothing is selected - total of tasks is showed only (e.g., 50)

### 1.1.1.1 Filtering

- Not Started – Tasks start date is in the future

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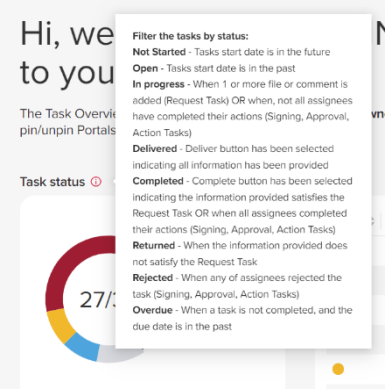
- Open – Tasks start date is in the past
- In progress – When 1 or more file or comment is added (Request Task) OR when, not all assignees have completed their actions (Signing, Approval, Action Tasks)
- Delivered – Deliver button has been selected indicating all information has been provided
- Completed – Complete button has been selected indicating the information provided satisfies the Request Task OR when all assignees 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"



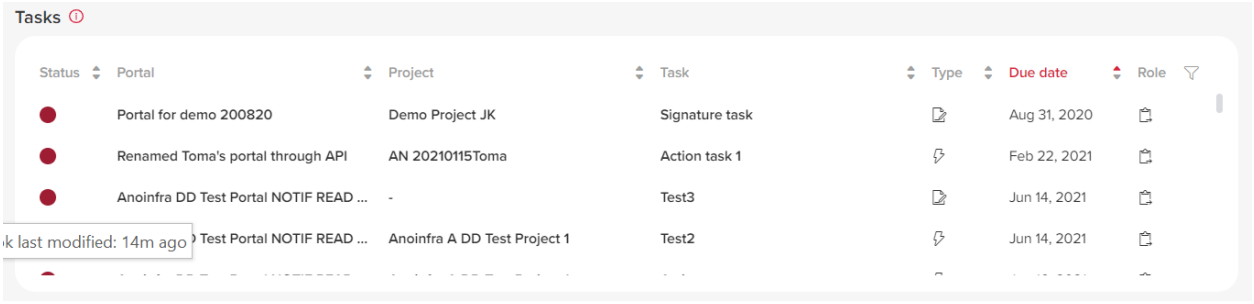

"Clear filter" clears user's selection in "Task Status" and “Task” dashboards – all tasks are shown.

### 1.1.2 Task Dashboard

Dashboard “Tasks” - shows task list with data from the tasks:

- Status - as colored bubble (Hovering on bubble status name is shown)
- Portal - portal name
- Project - project name
- Task - task name
- Type - 5 task types (Action, Milestone, Signing, Approval, Request)
- Due date - standard portal format used (from sooner to later)
- Role - as icon Owned or Assigned (Hovering on icon text "Owned" or "Assigned" is shown)

In case text is longer than the available space, columns "Portal", "Project", "Task" can be shortened with "..." (hovering on the shortened text full name is shown).
Each column sorting by alphabet is available. Default load is sorted by column "Due date" from sooner to later.




### 1.1.3 Pinned Portals

Pinned Portal Dashboard is a third dashboard in the Welcome page. This dashboard will generate data if at least one Portal is pinned in Black sidebar. If user has access only to one portal – dashboards are not leaded with data – user is redirected straight to that portal after user’s login.

Pinned Portals dashboard has 4 columns of data:

a. Portal - Portal name, word wrap is used in case of long name
b. Member firm - MF name
c. Tasks
d. Portal Progress - chart with pills.

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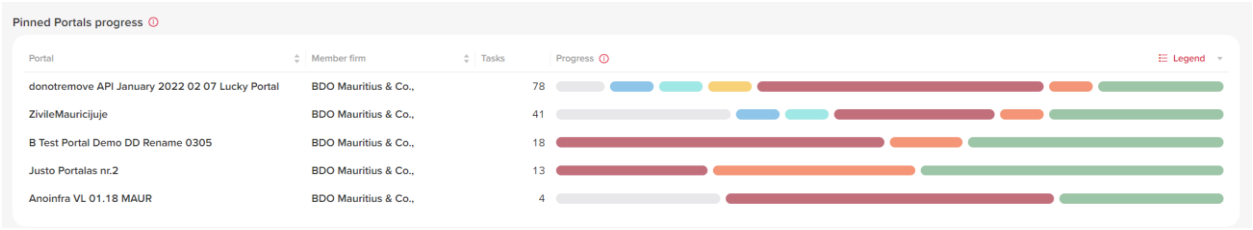


Column "Portal progress" is showing pills:

a. one pill is representing one status of portals tasks count within the same status
b. only portals/projects user has access (including restricted ones) are included in statistics
c. pills' color depends on status
d. the size of each pill is representing the proportion of each status tasks count
e. pills order left-right depends on the status order (different from the doughnut dashboard); pills are laid out in this order:

| Color | Codes | Status |
|---|---|---|
| Black | #333 | Not Started |
| Grey | #DADBE0 | Open |
| Blue | #15a4de | In progress |
| Blue/Green | #30dbd6 | Delivered |
| Yellow | #fdb91f | Returned |
| Warning Red | #ad1931 | Overdue |
| Orange | #FF5722 | Rejected |
| Green | #54a575 | Completed |

The size of each pill is representing the proportion of each status tasks count and the pill is not shown if there are 0 tasks in the particular status.

#### 1.1.3.1 Sorting

a. "Portal" and "Member firm" columns by alphabet
b. "Portal Progress" sorting is based on hierarchy of statuses and count of tasks large amount->small amount.
    1. Overdue
    2. Returned
    3. Delivered
    4. In progress
    5. Open
    6. Completed
c. *default sorting* is based on "Portal Progress", Overdue->Completed.

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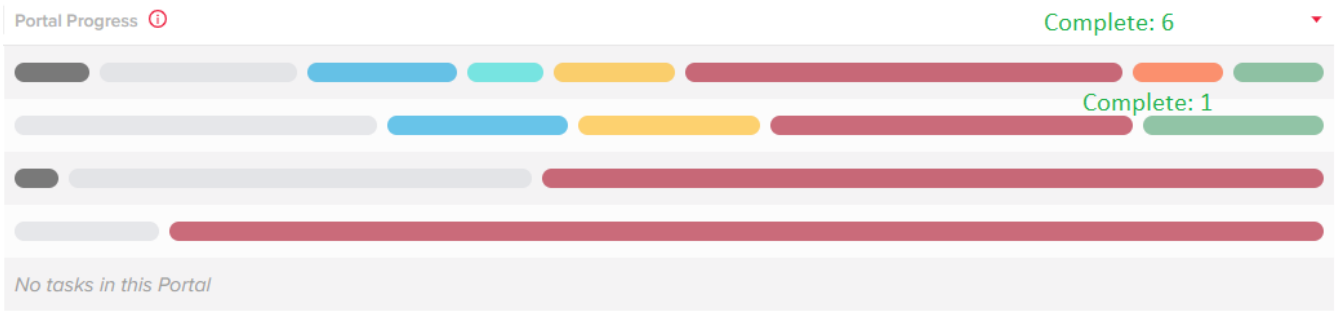
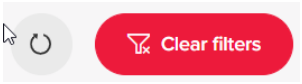
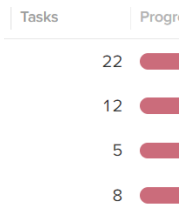



Button "Clear filters" has features:



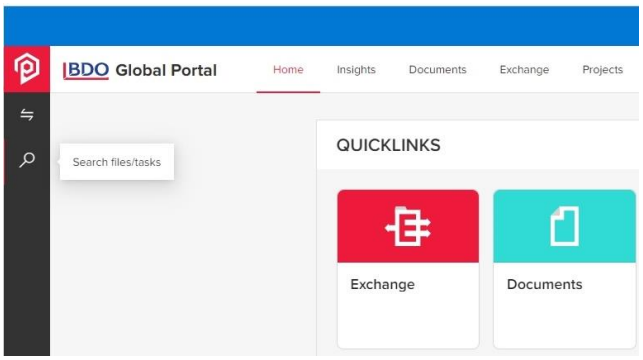

a. hovering on the button is highlighted
b. clicking on the button is resetting all the selections, sorting, switches made by user and moves back the page to default state without data reload. Status selection is removed in dashboard "Task status" and moved back to default selection: "Open", "In progress", "Delivered", "Returned", "Overdue" (this directly impacts the dashboard "Tasks").

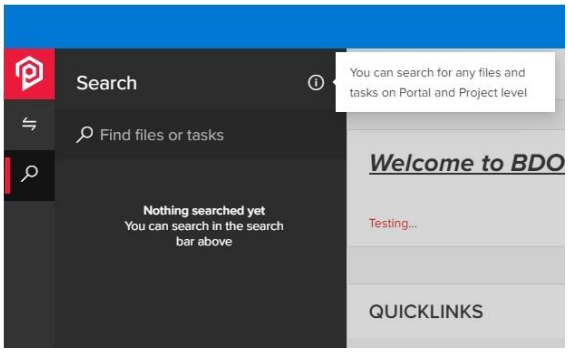
Additional column is added in "Pinned Portals" dashboard on Welcome page to show the task count for the pinned portals.




## 1.2 SEARCH

The black sidebar has a search icon, available for all users and displayed when the user logs in to the Client Portal.




The search is automatically triggered when the user starts typing in the search field. Search results have two sections *Tasks in Exchange NG* and *Files in Documents*. In each results section, if any files/tasks are found, it will show up to 10 results.

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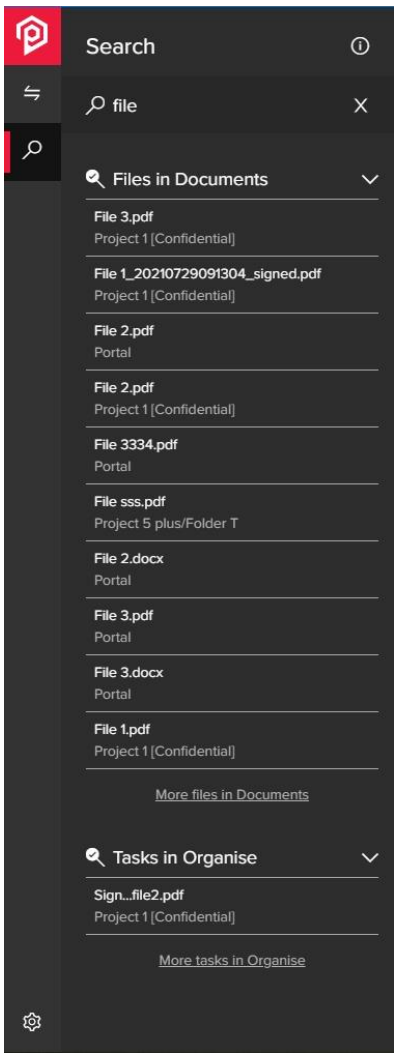
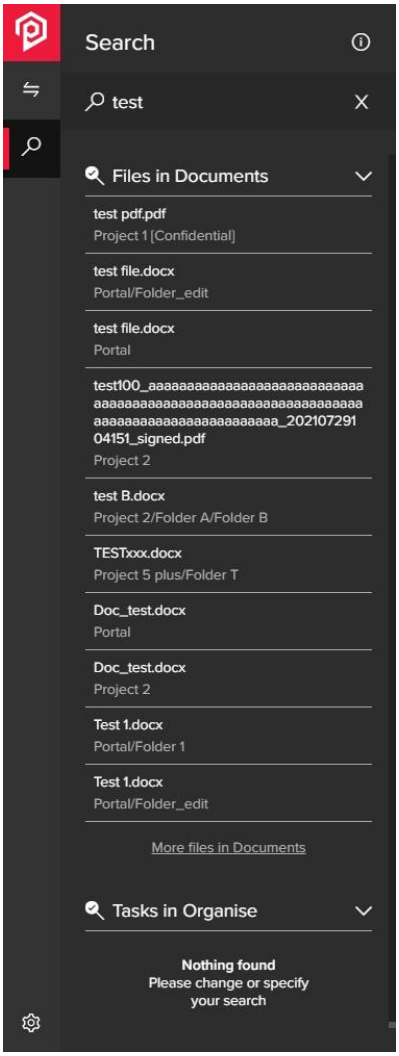
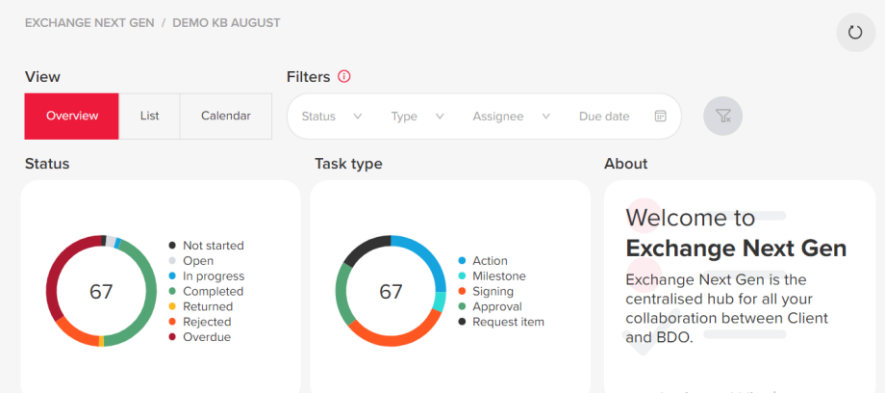




Search
test
Files in Documents
test pdf.pdf
Project 1 [Confidential]
test file.docx
Portal/Folder_edit
test file.docx
Portal
test100_aaaa




### 2.1.1 Dashboard “Status”

This dashboard has two elements – “doughnut” and list of statuses with exact order:

“Doughnut” and list will represent users’ tasks count.

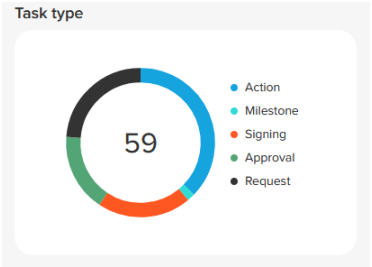
The size of each piece is representing the proportion of each status by tasks count.

Right side of dashboard “Status” is filled with list of statuses. Selection is available by clicking on each status name.

### 2.1.2 Dashboard “Task type”

Works in the same manner as dashboard "Status". Exceptions are listed below:

1. List of types with the final order and colors:
2. Hovering on piece shows name of type in the tool tip
3. Right side is filled with list of type - 5 possible options




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

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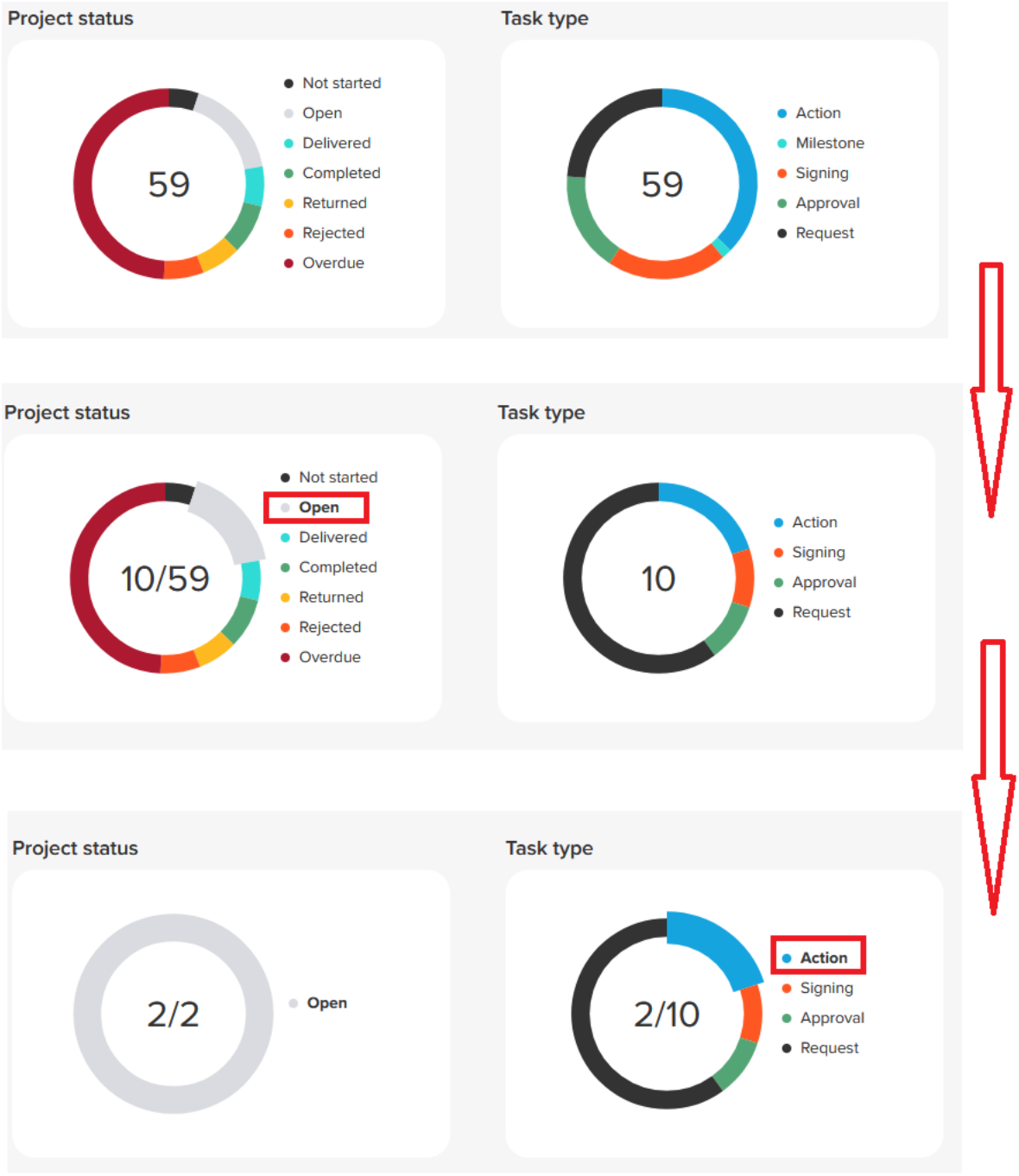
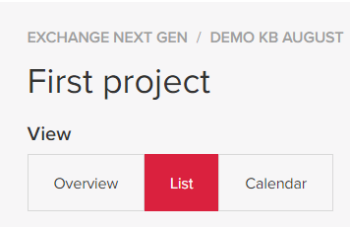



### 2.1.3 List view

After navigating to Exchange Next Gen page - Portal level dashboard, three solid radio buttons are available: Overview, List and Calendar. When clicking on List radio button, the Tasks table will be displayed, where system will provide the filters to view & filter the Portal tasks.

After this is done, user is able see all tasks data in Tasks table:

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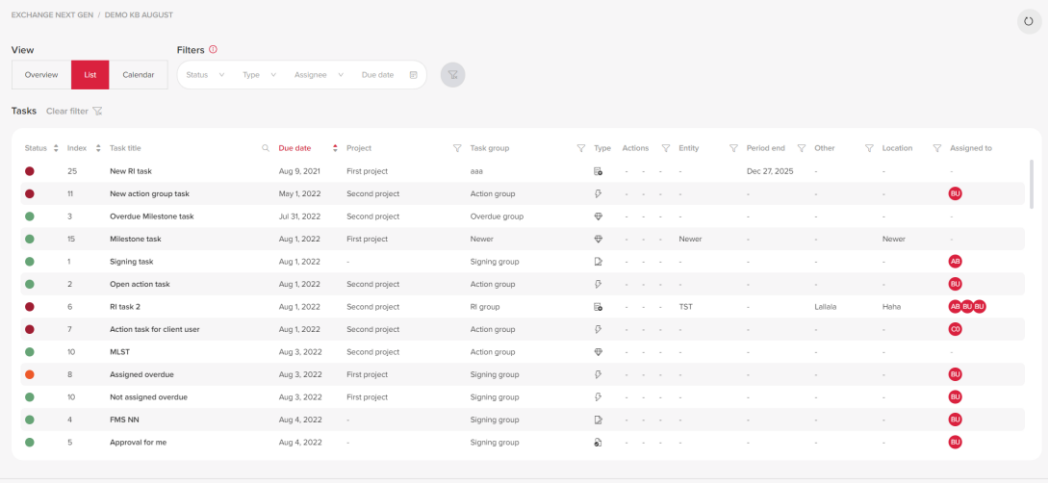


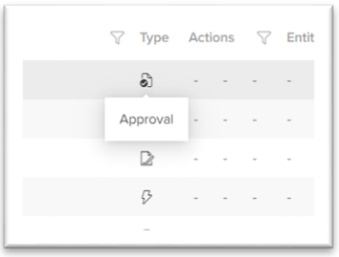

### 2.1.3.1 “Tasks” table

Please note that there are some attributes which are the same for all table filters:

- table filter or search icon is highlighted in RED when in use
- "Clear" is added to each filter for removal of users selection.

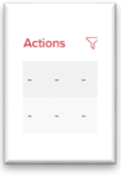
“Tasks” table for Portal level is the same as for Project level, only additional “Project” column is added:

- Status – status of the task displayed as a bubble with status color 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 task does not belong to a task group,”-“ symbol is displayed)
- Task type (Request; Action; Approval; Signing; Milestone) – symbol value is shown when hovering on it




- Actions – in this column, it is displayed if task is:
  a) Restricted/unrestricted: restricted tasks are displayed with eye icon
  b) Flagged/Not flagged: flagged tasks are displayed with flag icon:
  c) Exported/Not exported: exported tasks are displayed with arrow icon:

View for unrestricted/not flagged/not exported tasks:

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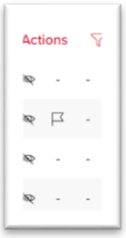
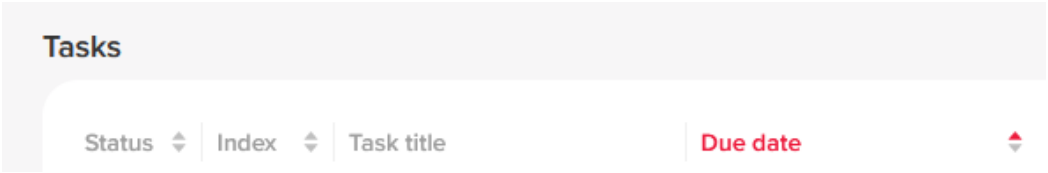
View for restricted/ flagged tasks (as example):




By default, all tasks in the table are sorted by Due date (from older to newer), but user can also sort tasks himself by pressing on Status, Index or again on Due date column values.




If table does not fit in a screen, horizontal scroll bar is used to see all the tasks

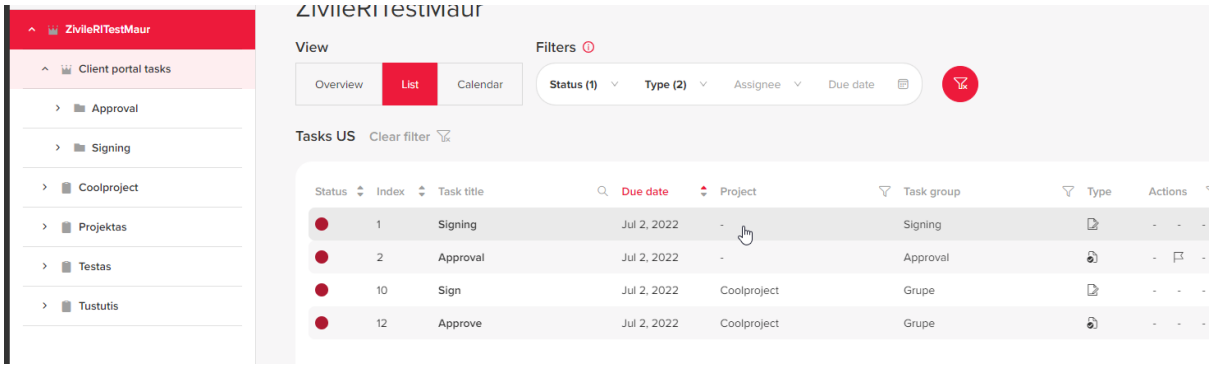
#### 2.1.3.2 Filters

In Portal level List view, tasks can be filtered by Master filters & Table filters as in Project level.

- **Task title**
- **Task group**
- **Action**
- **Location**
- **Entity**
- **Other**
- **Period End**
- **Project**

It is possible that some of the tasks don't have a specific attribute assigned to it (for example, entity or location). Such tasks can also be filtered by choosing a specific value in the filter.

Each line of task in both Portal and Project dashboard's List view is a link to the task overview page. While hovering, the line is greyed:




## 2.1.4 Calendar view

After choosing Calendar View in the radio button a default monthly view appears (if the master date filter is NOT selected)

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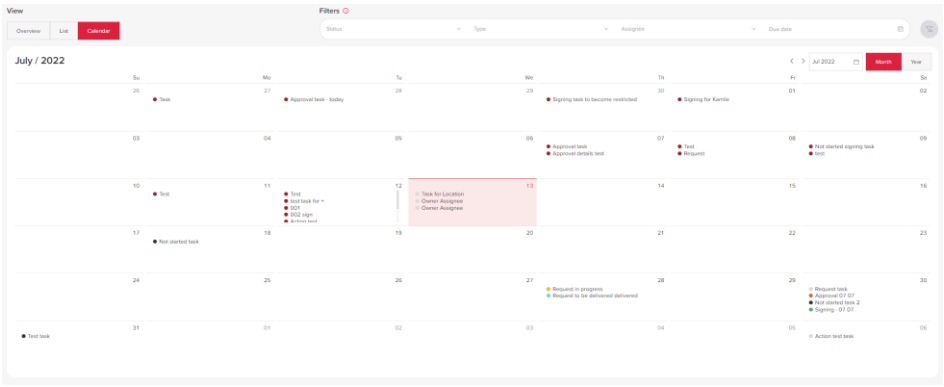
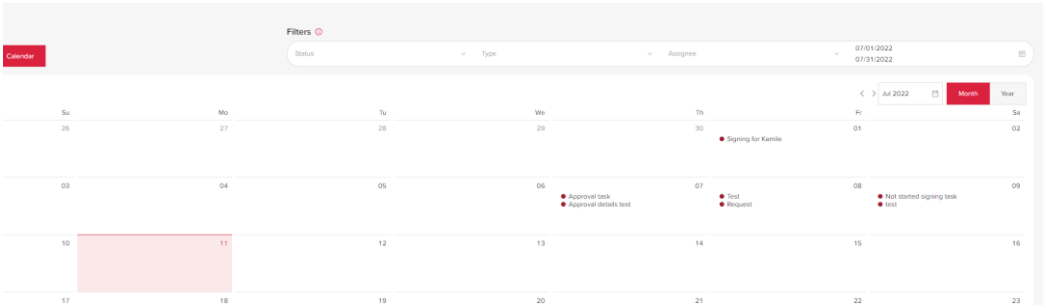
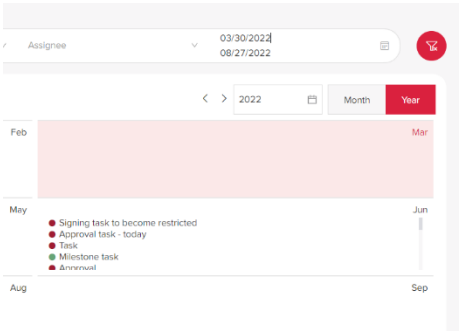



It is important to notice that Calendar view display depend on Master date filter. If master date filer is selected:

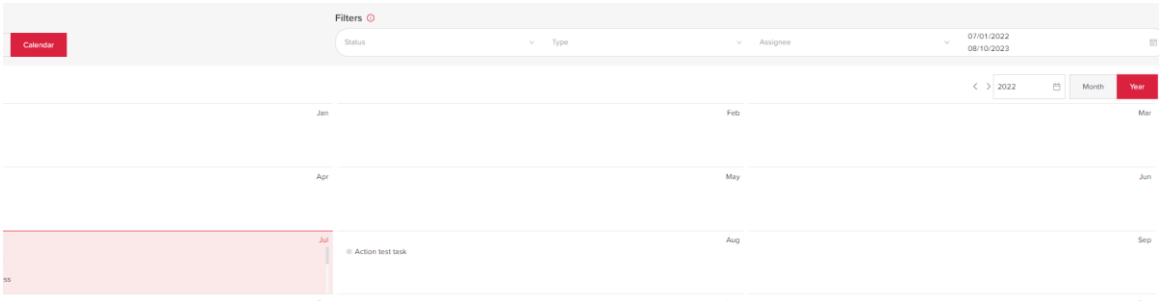
1. If the filtered period is within single month, the month is shown




2. If filtered period is between few months in the same year, the year is shown, which includes the filtered period.




3. In case filtered period includes 2 or more years, the first year of period is shown.

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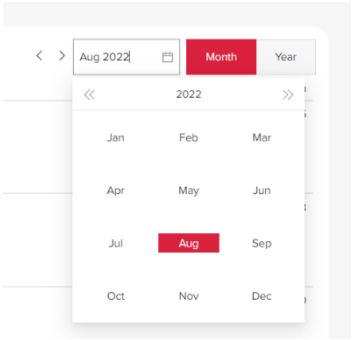
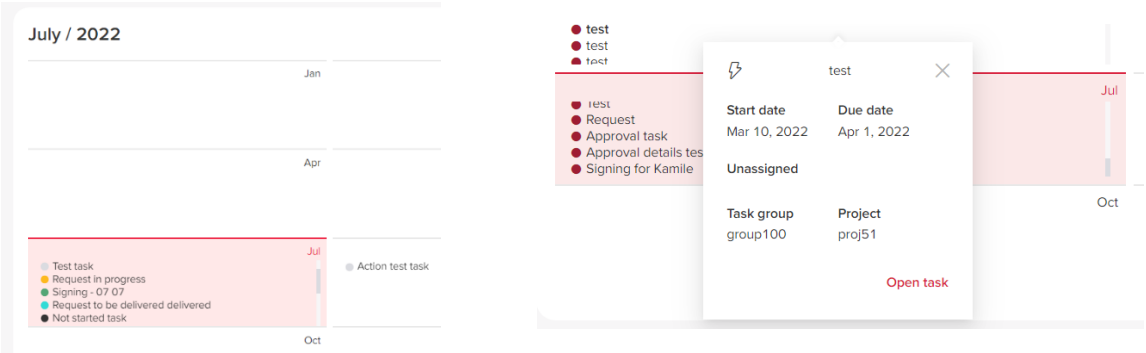
It is possible to switch from monthly view to yearly view (and opposite) by using radio button on the top left corner.




Task name and Task status is shown:

A) On its due date day, if monthly view is chosen
B) On its due date month, if yearly view is chosen.

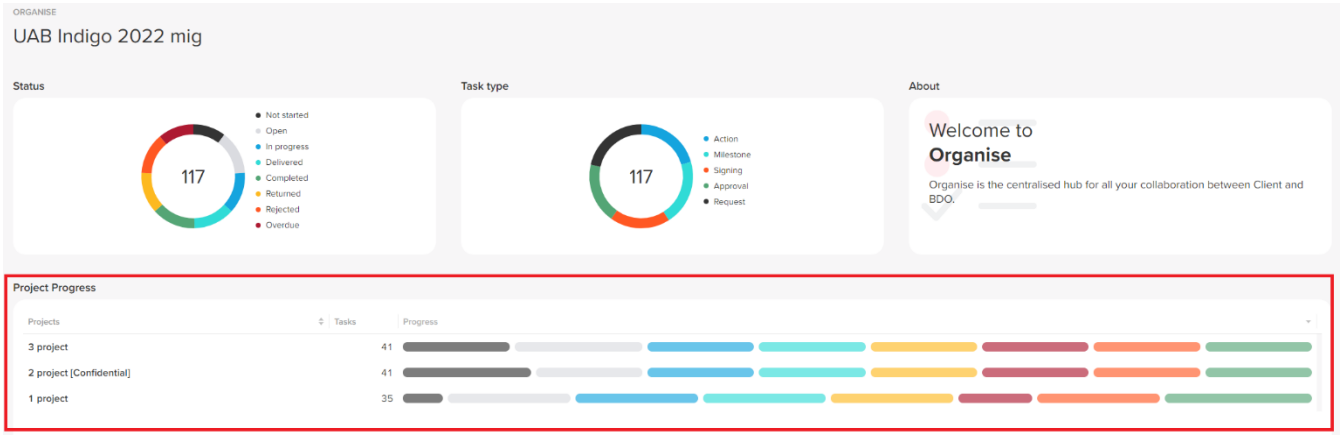
If task does not have a due date, it will not be displayed in the Calendar view. In cases of more tasks on the same day or month, a full task list is enabled using a scrollbar: After clicking on the task name, a pop-up will be displayed to show more information about the task:




After pressing on a day/month, chosen month/day button will also be displayed in pink color.

## 2.1.5 Pills dashboard

This dashboard is linked with “Status” dashboard directly, just showing statistics per project level. Dashboard “Task type” is linked too as additional filter. This dashboard has 3 columns: “Projects”, “Tasks” and “Progress”.




### 2.1.5.1 Column “Projects”

In this column user will see all projects from opened Portal where user is added to. In first line of projects always will be “Client portal tasks” if there are at least one task. Projects will be listed out under “Client portal tasks”. If project do not have tasks – this project will not be seen in “Projects” list.

### 2.1.5.2 Column “Tasks”

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

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#### 2.1.5.3 Column “Progress”

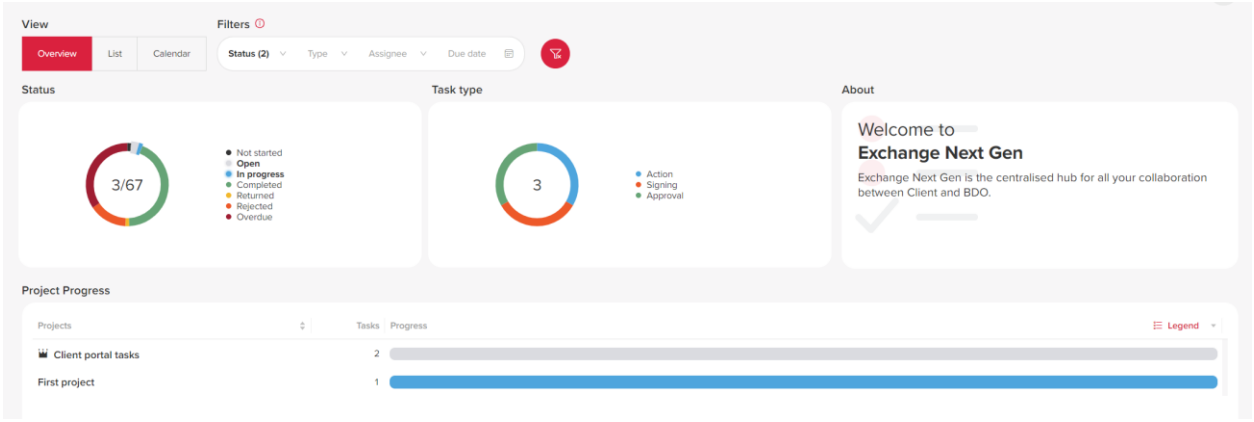
Column “Progress” is a chart with pills. Main functionalities are:

1. One pill is representing one status of projects tasks count within the same status
2. Pills' color is the same as status color
3. Pills order left-right depends on the status order (different from dashboard "Status")
4. The size of each pill is representing the proportion of each status tasks count
5. Pill is not shown if there are 0 tasks in the particular status
6. Project line is not shown if no tasks in the project or no tasks left to show after filters applied

#### 2.1.5.4 Dashboards “Project progress” interaction with “Status” and “Task type” dashboards

Clicking on doughnut or list in dashboard “Status”:

1. Only projects are left, which has selected status pill
2. All pills with selected status are highlighted
3. Numbers on the left side of the pills are showing count of tasks within selected status
4. Sorting is not affected
5. User can sort only filtered results after selection in dashboard "Status"




This dashboard is interactive with two doughnut dashboards in reverse order as well.

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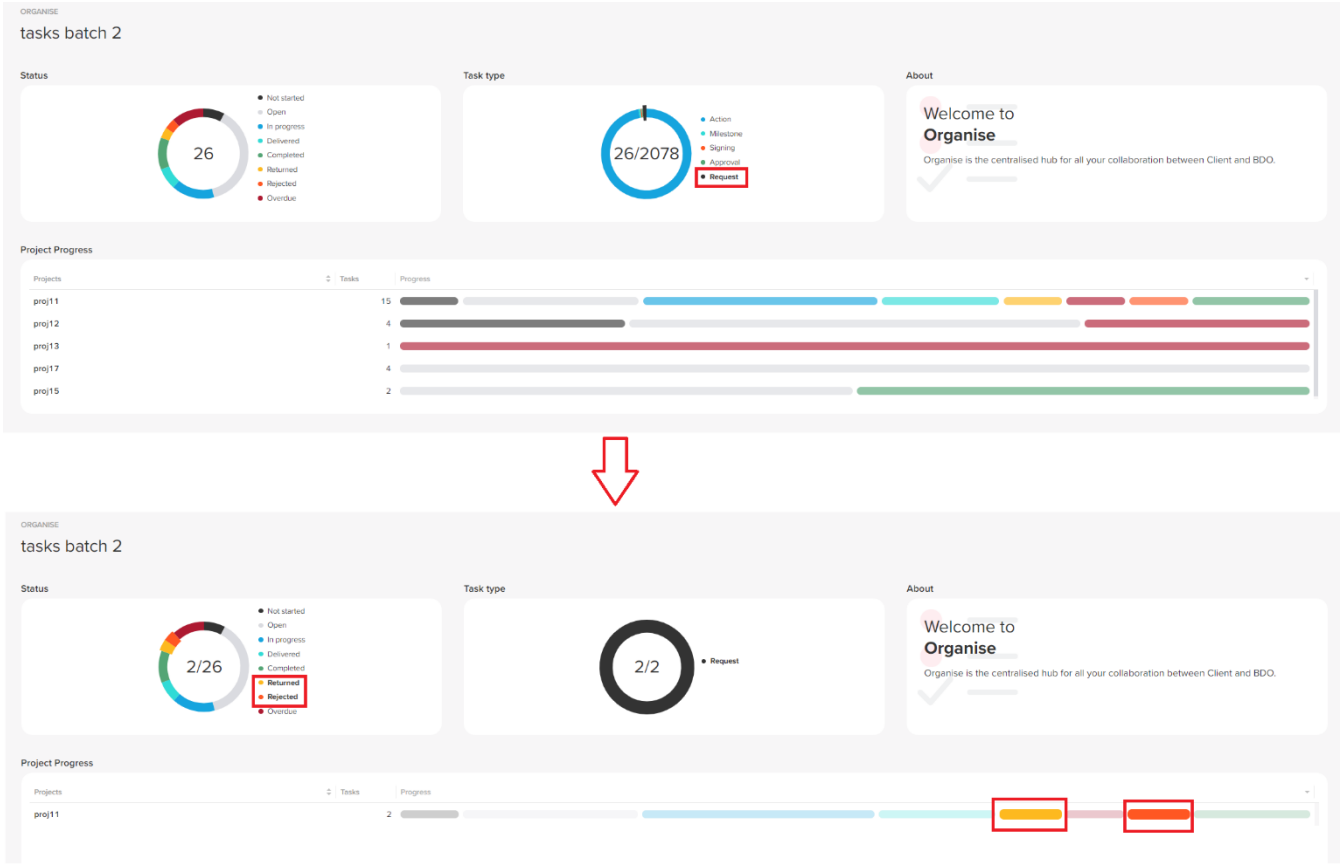
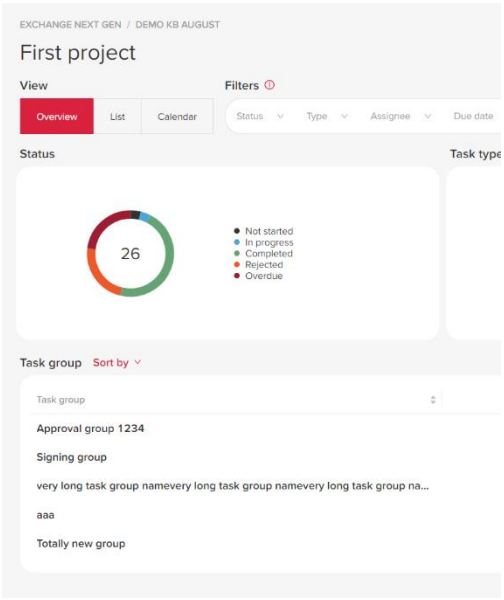



## 2.1.6 Grouping Pills dashboard

In Exchange Next Gen, 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.

To change task grouping, user has to press on “Sort by” button and choose accordingly:

- Task group (default)
- Location
- Entity
- Period end
- Other grouping

After choosing a different grouping option:

- First column is renamed to the selected grouping
- Dashboard title is changed to the selected grouping
- All tasks are regrouped by selected grouping, all tasks statistic and pills are recalculated (for columns "Tasks" and "Progress")

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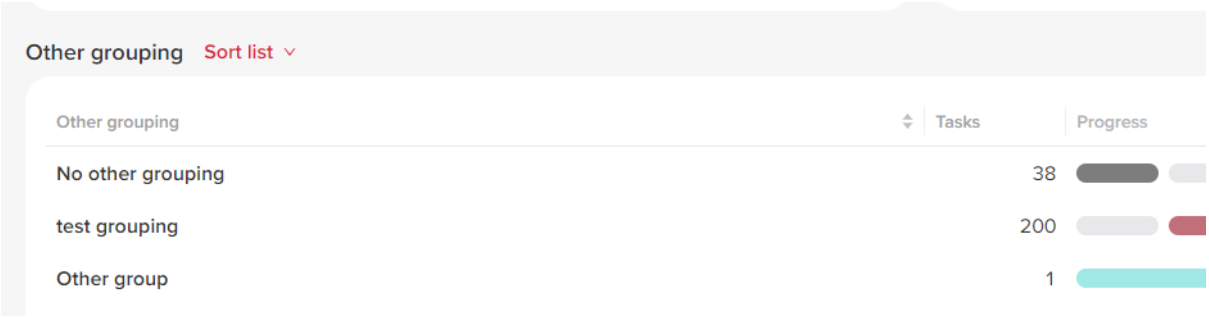



It is possible to sort groups by clicking arrows displayed on the first column of the dashboard. If "No X" group is showed, it is always showed in the first row despite default or user's sorting option. This functionality applies to the "Client Portal tasks".

If grouping is chosen by “Period End”, groups are sorted by date.

Selected grouping option is kept:

- If user is changing projects within the same portal
- If master filters are cleared
- If master fields are cleared

# 2.2 PROJECT DASHBOARD

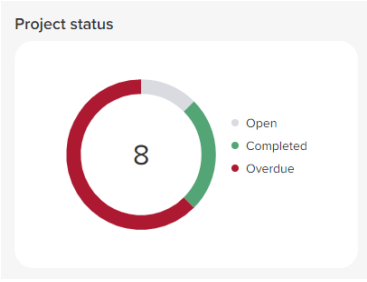
## 2.2.1 Progress bars

There are 3 dashboards with “doughnuts”: “Status”, “Task type” and “Assigned to”. Compared to the Portal level, the functionality of first two dashboards on the Project level do not change. Dashboards represents the statistics of all tasks count in the Project to which the user has an access to.

There is no selection by default load. User will be able to select any status or task by himself/herself.

### 2.2.1.1 Dashboard “Status”

“Doughnut” and list will represent users’ tasks count. E.g., If user has tasks with just three statuses – those statuses will be in the list and “doughnut” will have just three pieces in different colors.




Interaction with other dashboard - "Task type" - the selection of "Status":

1. Acts as filter and reduces options for selection - Doughnut pieces and Task type names
2. Count of tasks inside of doughnut shows the total amount filtered (e.g., 37)

Right side of dashboard “Status” is filled with list of statuses.

### 2.2.1.2 Dashboard “Task type”

It works in the same manner as dashboard "Status". Exceptions are listed below:

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1. List of types with the final order and colors:
2. Hovering on piece shows name of type in the tool tip
3. Right side is filled with list of type - 5 possible options

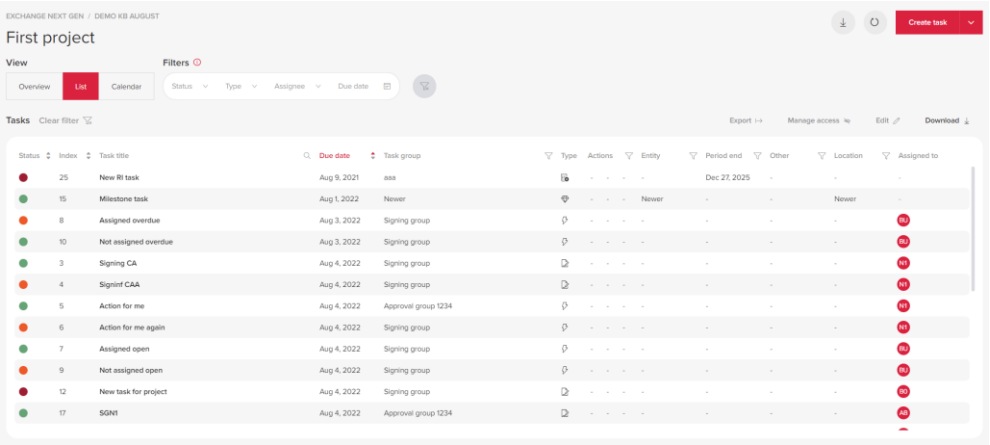
#### 2.2.1.3 Dashboard “Assigned to”

It works in the same manner as dashboard "Status"/”Task type”. Exceptions are listed below:

1. List is made from all assignees in the extracted tasks.
2. The same 8 colors (as in Status) are used and repeats (with some opacity) if more than 8 assignees
3. 1st row is dedicated for "@Me", if there are tasks assigned to the user
4. 2nd row is dedicated for "Unassigned", if there are tasks with **no** assignees
5. 8 rows are showed maximum. In case of larger list, scroll bar becomes visible
6. Rows are sorted by A to Z (users just with emails are included)
7. If assignees name is very long, the name is shortened and at the end "..." is visible. In case of hovering full name is shown as tool tip
8. Interaction with "Status"/"Task type" is the same in reversed order
9. Hovering on doughnut piece shows name of assigned in the tool tip

### 2.2.2 List view

To see all tasks data as a list on Project level (or Client portal tasks level), the user needs to go to any project, switch view from Overview to List and all tasks data in Tasks table appear.




#### 2.2.2.1 “Tasks” table

“Tasks” table includes columns below, which display information about the task.
*Note: the Task table on Project level behaves the same way as on the Portal level.*

#### 2.2.2.2 Restrictions

The restriction and flag marks are visible in all list views (Portal, Project, Client Portal tasks)
Restricted mark is shown when task has limited access:

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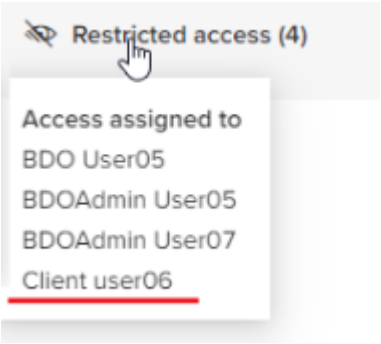
a. the list of users, who has access to the task, is shown while hovering (like in task overview:
b. "-" is shown if no restriction
c. filters are updated and filtering on action column
d. Restricted mark is not showing on Client portal tasks



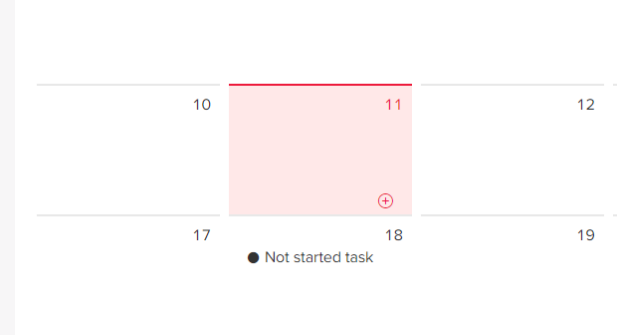

2. Flagged mark is showed when task is flagged
   a. the symbol is
   b. "Flagged" is shown while hovering
   c. "-" is showed if no flag
   d. filters are updated and filtering on action column

### 2.2.3 Calendar view

Project level calendar view was created to display all Project tasks with due date in the calendar.

*Note: the Calendar view on Project level behaves the same way as on the Portal level.*

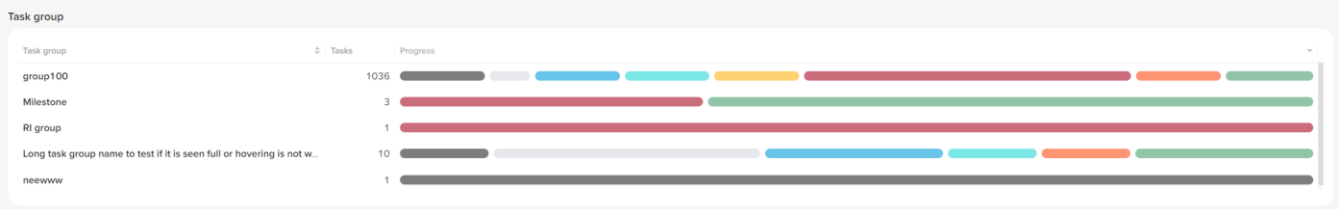
After selection a day/month, that particular day/month button will be displayed in pink color. If user is on Project level, using BDO role, he/she will also be able to see a „+“ sign in the bottom right corner. After pressing on it, user will be redirected to task (Action, Milestone or request Item) creation page.




*Note: On "Client portal tasks" task creation is disabled as Signing/Approval tasks are created from "Documents" only.*

### 2.2.4 Pills dashboard

Another dashboard in Project level Overview page is “Task group”. It will show tasks count and statuses in each task group (of selected project) where user has access to. Statistic with data is shown as pills with different colors. This dashboard is linked with “Status” dashboard directly, just showing statistics per project level. Dashboards “Task type” and “Assigned to” are linked too as additional filters. “Task group” dashboard has 3 columns: “Task group”, “Tasks” and “Progress”.




In case of no tasks at all – text: “No tasks yet” is shown in this dashboard.

#### 2.2.4.1 Column “Task group”

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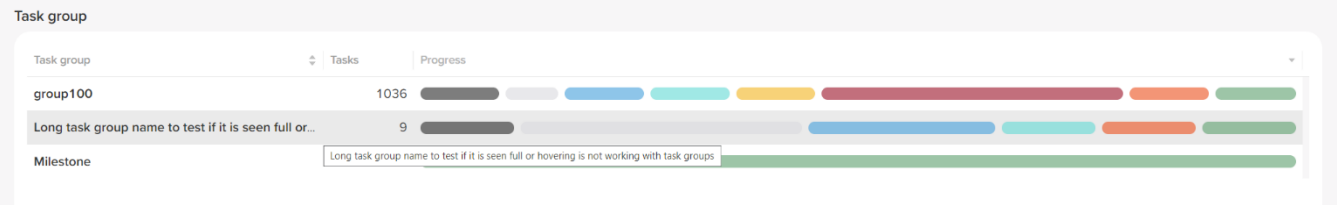
In this column user will see all task groups from selected Project where user is added to. On “Task group” column sorting is based on alphabet. If task groups name is too long and it does not fit into available space – name can be shortened with “…”. Hovering on the shortened text – full name is shown.




#### 2.2.4.2 Column “Tasks”

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

#### 2.2.4.3 Column “Progress”

Column “Progress” is a chart with pills. Main functionalities are:

1. One pill is representing one status of Task group tasks count within the same status
2. Pills' color is the same as status color (with 64% opacity in comparison with Status doughnut)
3. Pills order left-right depends on the status order (different from dashboard "Status")
4. The size of each pill is representing the proportion of each status tasks count
5. Pill is not shown if there are 0 tasks in the particular status
6. Task group line is not shown if no tasks in the project or no tasks left to show after filters applied

#### 2.2.4.4 Dashboards “Project progress” interaction with “Status”, “Tas type” and “Assigned to” dashboards

Clicking on doughnut or list in dashboard “Status”:

1. Only task groups are left, which has selected status pill
2. All pills with selected status are highlighted
3. Numbers on the left side of the pills are showing count of tasks within selected status
4. Sorting is not affected
5. User can sort filtered results

Clicking on doughnut or list in dashboard “Task type”:

1. Only task groups are left, which has selected task types
2. Only those pills are showed, where task type exists in that status
3. Pills are **not** highlighted
4. Numbers are affected:
   - 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

Clicking on doughnut or list in dashboard “Assigned to”:

1. Only task groups are left, which has selected task types
2. Only those pills are showed, where assigned person exists in that status
3. Pills are **not** highlighted
4. Numbers are affected:
   - 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

## 2.3 FILTERS

Three filters, Status, Type and Assignee are added to Portal in section "Filters" and Project Overview page.

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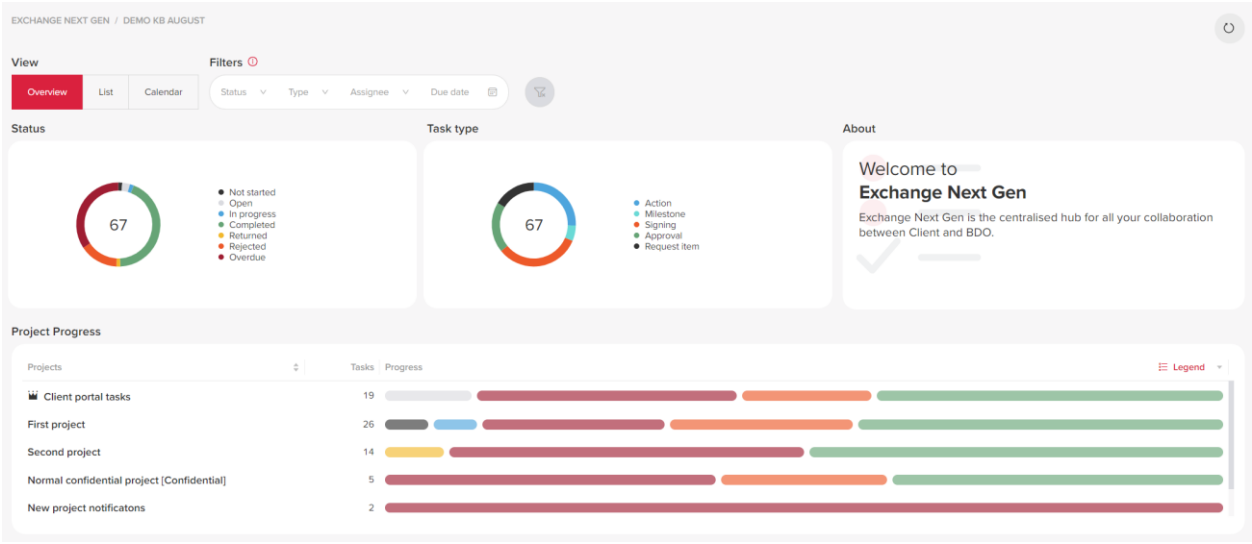
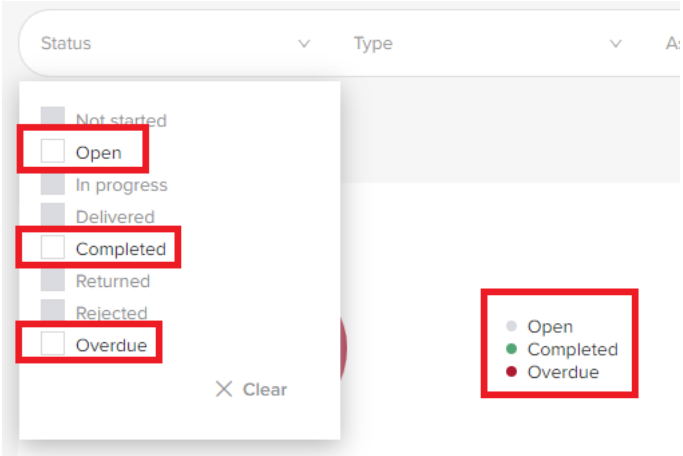



These filters will be used with user's selection while changing view between "Overview", "List" and "Calendar". These filters are added in "Client Portal tasks" (as specific project) too.

After each selection the page updates all dashboards, because filters are directly connected to Doughnuts "Status", "Type" and "Assigned to" (“Assigned to” doughnut is on project level only).

### 2.3.1 Filter “Status”

User can select a status by clicking on filters area and choose needed status by clicking on it. All statuses are showed, not available statuses in the portal/project are greyed out. If status is not available after other filters in use, it is greyed out and not possible to select. This means that available statuses are changing dynamically and in the same logic as in doughnuts. Multiple selection is available. Statuses are listed in the same order as in Doughnut. When user makes a selection – the count of selection is showed next to filter name: e.g., "Status (3)".




"Clear" button is shown and clears all before selected statuses. Button is greyed out while filter is not in use.

### 2.3.2 Filter “Type”

User can select a type by clicking on filters area and choose needed type by clicking on it. All types are showed, not available types in the portal/project are greyed out. If type is not available after other filters in use, it is greyed out and not possible to select. This means that available types are changing dynamically and in the same logic as in doughnuts. Multiple selection is available. Types are listed in the

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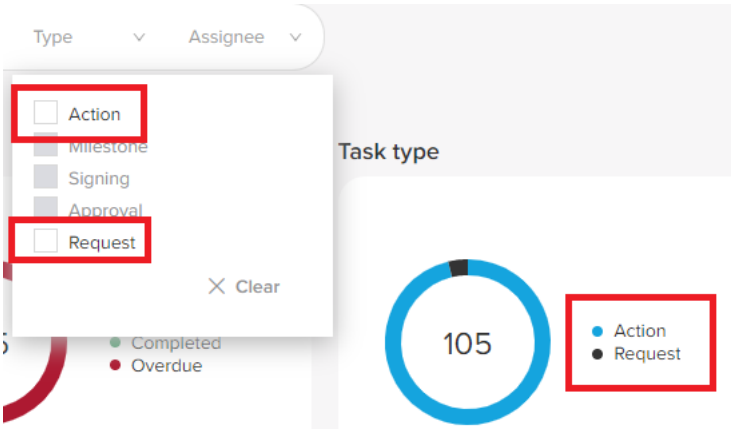
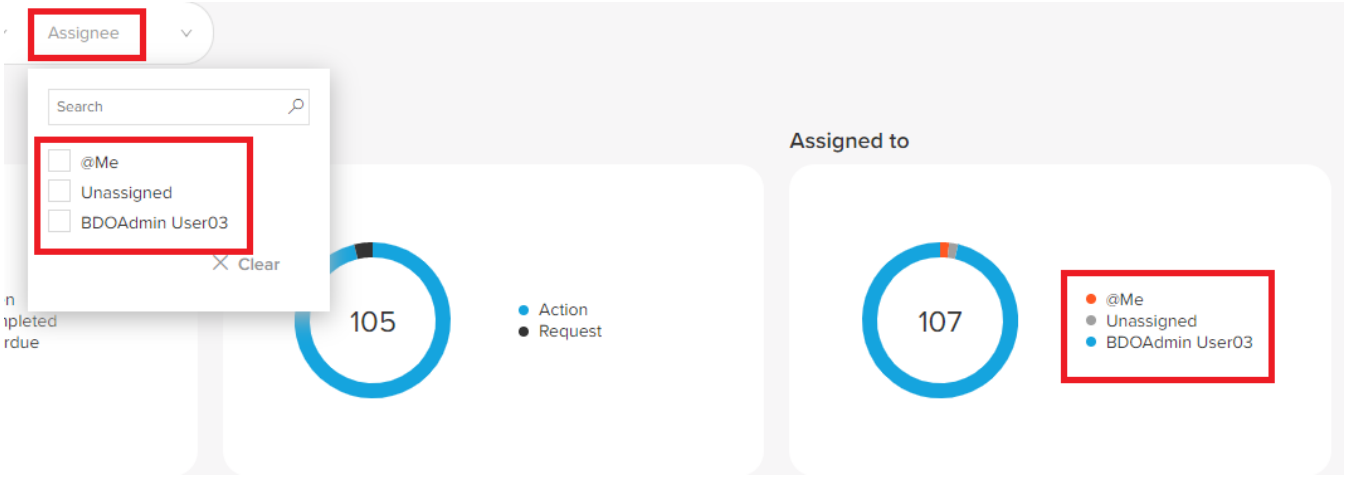
same order as in Doughnut. When user makes a selection - the count of selection is showed next to filter name: e.g., "Type (2)".




"Clear" button is shown and clears all before selected types. Button is greyed out while filter is not in use.

### 2.3.3 Filter “Assignee”

User can select a type by clicking on filters area and choose needed type by clicking on it. Only available assignees are showed. If assignee is not available after other filters in use, it is greyed out and not possible to select. [Just in Project level] - This means that available assignees are changing dynamically and in the same logic as in doughnuts. Multiple selection is available. When user makes a selection - the count of selection is showed next to filter name: e.g., "Assignee (5)".




1st line is always dedicated to option "@Me”, and it filters tasks assigned to the user. Line is shown if such tasks are available. 2nd line is always dedicated to option "Unassigned" and it filters tasks without assignees. Line is shown if such tasks are available. Afterwards all other users are shown in alphabetical order. In this filter fits 8 assignees and if there are more scroll bar appears.

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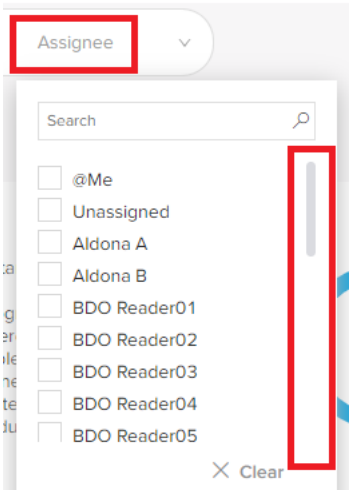



Additional option of search is available on top, search starts with start of typing. Selected assignees are not affected while searching.

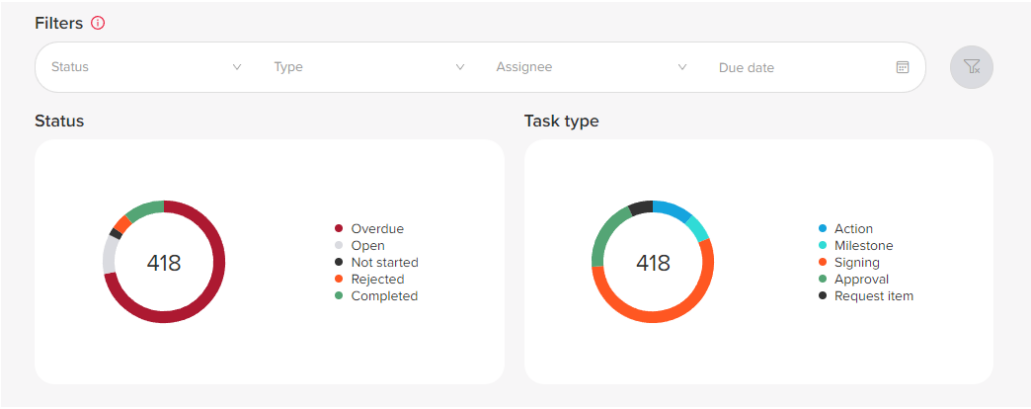
"Clear" button is shown and clears all before selected types. Button is greyed out while filter is not in use.

### 2.3.4 Master filters

Master filters are kept while changing dashboards between projects, Portal level and Client Portal tasks.

When navigating to Exchange Next Gen and choosing the project, the Overview view and the master filters are displayed together with clear filter button.

- Status
- Type
- Assignee
- Due Date




*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).*

If there are no tasks to show in the other project/portal/client portal tasks while using selected master filters, dashboard is shown as empty. Also, additionally, the pop-up message is shown.

### 2.3.5 Due date filter

A "Due date" filter is added in "Filters" on Portal and Project level Overview pages.

Due date will be called "Master filters" as well and will be used with user's selection while changing view between "Overview", "List" and "Calendar".

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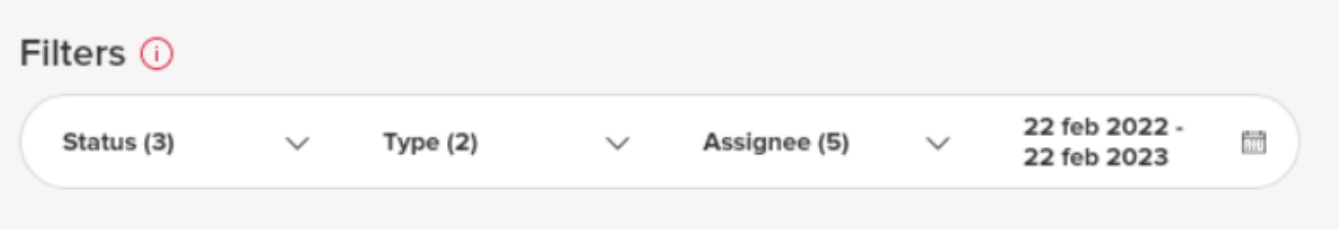
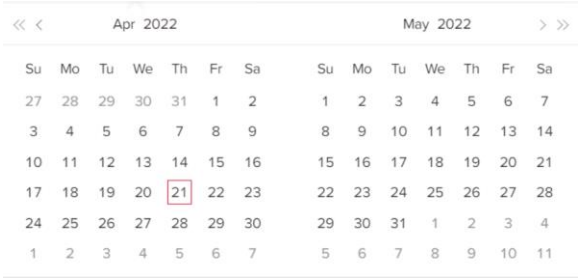
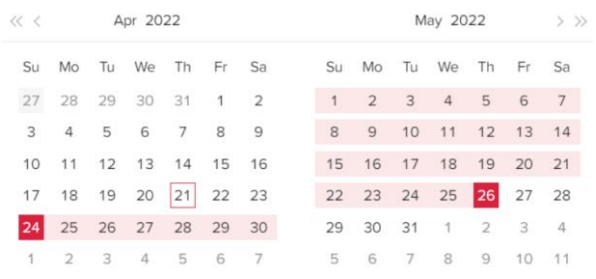
Selected filter will look like this:



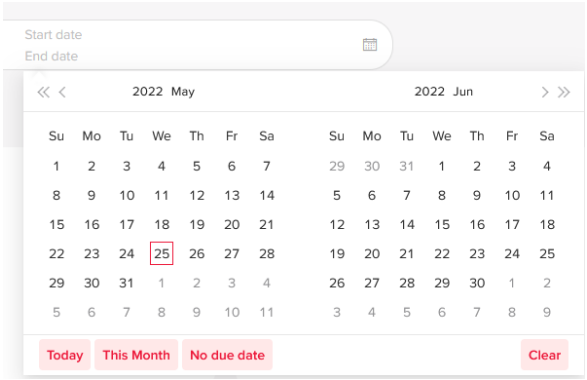

Clicking on filters area - filters options opens/hides:

- The calendar is shown - standard "datePicker"
- User always is selecting both start and end dates
- Two months are showed
- Options to move month and year to the future and past is available




After each selection the page updates all dashboards. This filter is not interactive and is not showing possible dates to select. After selecting a period, the filtered tasks are limited to that period. Additional pre-set ranges are available as "Today", "This Month" and "No due date". “No due date” filter the tasks with no due date defined.




## 2.3.6 Project level filters

When clicking on List radio button, the Tasks table will be displayed, where system will provide the filters to view the project tasks.

"Client portal tasks" is using the same list as specific project.

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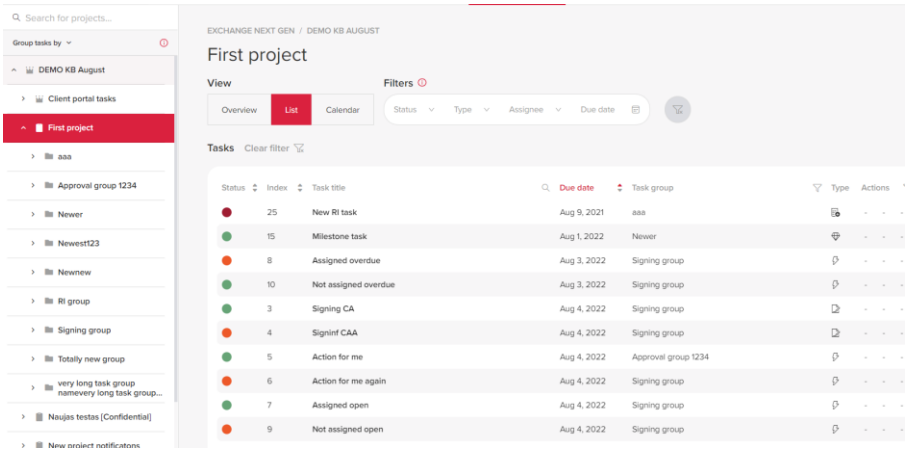


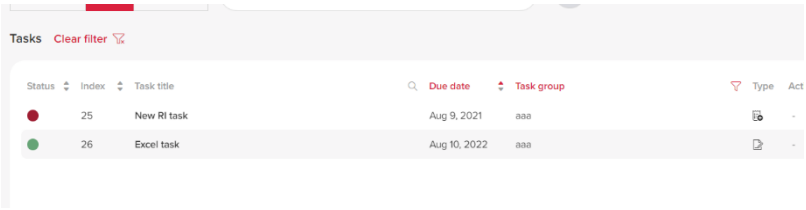

User can filter tasks by using either:

- Master filters (Status, Type, Assignee & Due date) provided above the task table
- Table filters provided in the table

### 2.3.6.1 Filters & search options

Some attributes are the same for all table filters:

- table filter or search icon is highlighted in RED when in use
- "Clear" is added to each filter for removal of users selection: button is active only if some values are chosen and when pressed, clears those values.




More information about each filter:

**Task title:** by pressing on columns name, user can search for a specific task by its title
**Task group:** user can use this filter by choosing a specific value or a multiple values provided in the list by alphabet.
**Action:** user can use this filter by checking values from three different parameters. If no tasks according to any parameter can be found, checkbox alongside that parameter is greyed out.
**Location:** user can use this filter by choosing a specific value or a multiple values provided in the list by alphabet.
**Entity:** user can use this filter by choosing a specific value or a multiple values provided in the list by alphabet.
**Other:** user can use this filter by choosing a specific value or a multiple values provided in the list by alphabet.
**Period End:** user can use this filter by choosing a specific period end date or dates provided in the list from older to newer.

**No values**

It is possible that some of the tasks don't have a specific attribute assigned to it (for example, entity or location). Such tasks can also be filtered by choosing a specific value in the filter:

- "No Task group" (only on Client portal/ Portal level task) for "Task Group"
- "No entity" for "Entity"
- "No location" for "Location"
- "No period end" for "Period End"
- "No other grouping" for "Other"
- "No projects" (only on Portal level) for "Projects" (filter exists only on portal level)

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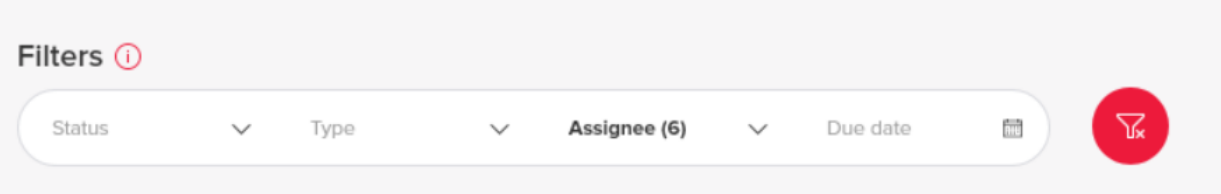
### 2.3.7 Clear master filters

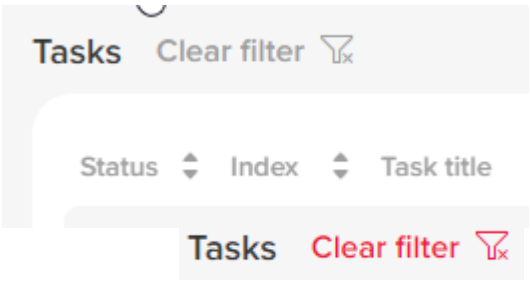
Button "Clear Master filters" is added next to Master filters in Project and Portal level dashboards and in all views – Overview, Calendar and List.




When no filters are selected, button is greyed out and when filters are in use, button is active.

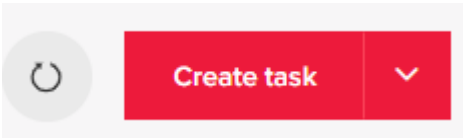
If button is active, all Master filters are removed after user click.

If button is red, all filters/searches are cleared out from the table after user clicks on the button.




Button "Reload data" is added in Portal and Project level dashboards and in all the views – Overview, List and Calendar. In the project dashboard the button is placed next to 'Create task button.

Clicking on the button is reloading all data in the page without changing any of users preferences:




## 2.4 NOTIFICATIONS

This table summarises new and old toggles that will be under "Notification preferences". Red color indicates new toggles and new notifications that are generated using them.

| BDO/ Client | Changes to current toggles | Name of a Toggle in Notifications preferences (Tasks, Exchange NG) | Tooltip text |
|---|---|---|---|
| BDO | Rewording | Task assigned | When a task is assigned in Exchange Next Generation, the user(s) that the task was assigned to are notified |
| | New toggle added | Task unassigned | When a Request/Action task has been unassigned, all BDO users and all Client users with access to the Project and the task are notified. |
| | Rewording | Task status change | When an Approval, Signing or an Action task is completed/rejected at the Portal or Project level, or when request task is delivered the task owner is notified. |
| | - | Task overdue | When a task is due in two days or becomes overdue, all BDO and all Client users with access to the Project and Request Task are notified. |

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| | | | |
|---|---|---|---|
| | New toggle added | New comments | When a new comment is added by any user, all BDO users and all Client users with access to the Project and Request Task are notified. |
| | New toggle added | Uploads added | When a file is uploaded by any user to a Request task, the task owner is notified |
| | New toggle, different wording from Exchange Classic | Export status | When Request task files are exported to APT successfully all BDO users invited to that Project are notified. If export failed, then BDO user that initiated the transfer is notified. |
| Client | - | Task assigned | When a task is assigned in Exchange Next Generation, the user(s) that the task was assigned to are notified |
| | New toggle added | Task unassigned | When a Request/Action task has been unassigned, all BDO users and all Client users with access to the Project and the task are notified. |
| | New toggle, different wording from Exchange Classic | Request returned | When a Request task is returned by BDO, all client users with access to the Project and Request task and/or assigned BDO users are notified. |
| | New toggle, different wording from Exchange Classic | Request completed | When a Request task is completed by BDO, all Client users with access to the Project and Request task and/or assigned BDO users are notified. |
| | - | Task overdue | When a task is due in two days or becomes overdue, all BDO and all Client users with access to the Project and Request task are notified. |
| | New toggle added | New comments | When a new comment is added by any user, all BDO users and all Client users with access to the Project and Request task are notified. |

# 3. TASKS

## 3.1 EDIT A TASK

### 3.1.1 Request Item status change

After RI creation, the user is navigated to the Task Overview page where they can see statuses and action buttons. Statuses and action buttons are related and changing according to users' interactions (adding files, comments, clicking certain action buttons).

Open created RI task. In the Overview page under the Task name the Task status is displayed.

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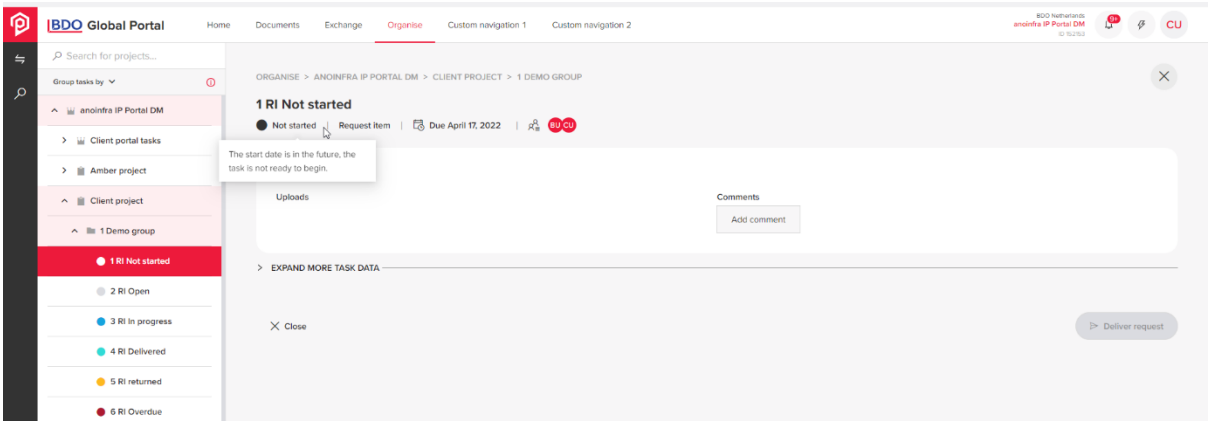



The status of the RI task is indicated by the status name and a colored bubble next to it. Hovering over these statuses an explanation text is displayed:

1. **Status** ● Not started - The start date is in the future, the task is not ready to begin. Once the Start date becomes later than today, status from Not started changes to Open.

2. **Status** ● Open - The task is ready to begin.

If RI task is created without a start date, or start date is today or earlier than today, RI task status is Open.

3. **Status** ● In progress - When 1 or more file or comment is added (Request Task) OR when, not all assignees have completed their actions (Signing, Approval, Action Tasks).

When BDO or Client user adds at least one file or comment in Task overview page, task status becomes In progress.

4. **Status** ● Delivered - A Request Task has been sent to BDO for review.

After Client user or BDO User, assigned to the RI task, clicks on „Deliver request“ button, task status becomes Delivered. "Deliver request" button is not active and greyed out after delivery was made.

All uploaded files becomes read only in Exchange NG and in Documents page. If user adds additional file to uploads, or a new comment, task status goes back to In progress. All files become editable, until User clicks on „Deliver request“ button again, and task will be Delivered, with all files in read only mode.

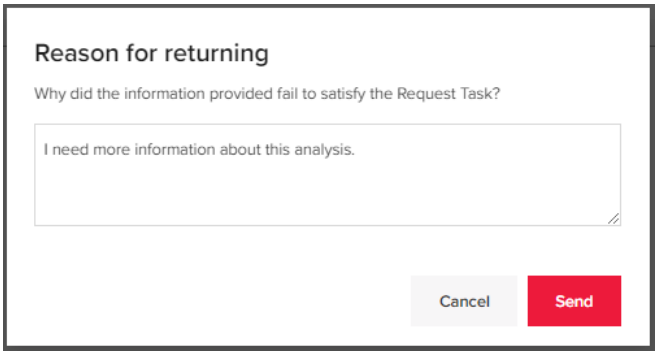
5. **Status** ● Completed - Task was completed and does not require any additional actions.

All files in Uploads becomes read only in Exchange NG and in Documents page. BDO user sees Return and Export buttons at the end of Task Overview page. The RI task can‘t be edited when task is status Completed.

6. **Status** ● Return - The information provided in the Request Task did not satisfy the requested items.

If BDO Portal Admin is not satisfied with the Client‘s uploaded documents/comments to the RI, he can return it by clicking on the “Return” button. RI can be return as many times as it is necessary. All added documents in Returned status are editable and task is editable too.

Clicking "Return" button a mandatory pop up window opens. A reason for returning is required and it can be no longer than 1000 characters. After text is entered, "Send" button becomes active.

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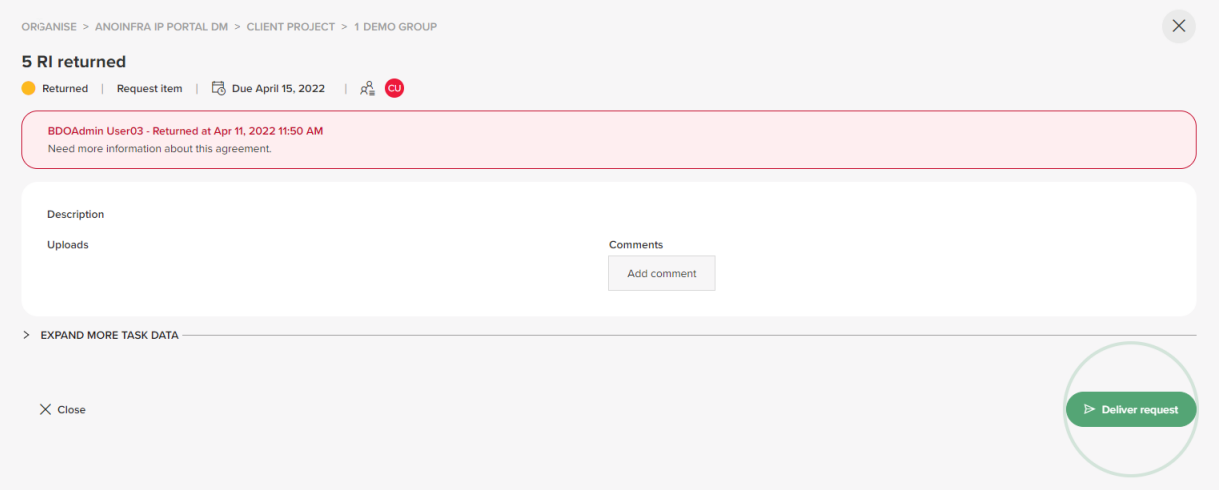
Client user or BDO user, who is assigned to the task, sees active "Deliver request" button.




7. Status Overdue - When a task is not completed, and the due date is in the past.

Files have same restrictions as in the status prior to Overdue. If task was in Overdue status and due date was changed to the future or removed at all, then task should get the status prior to being Overdue.

### 3.1.2 Action/Milestone

When the Action/Milestone tasks is successfully created, user is navigated to the Task Overview page, where he can see statuses and action buttons. Statuses and action buttons are related and changing with users interactions (comments, clicking certain action buttons).

Choose the project and open created Action/Milestone task. In the Task overview window under the task title information about the task is displayed:

- Status
- Task type
- Due date
- Assignees (no Assignees for Milestone)

The status of the Action and Milestone task is indicated by the status name and a colored bubble next to it.

- Not started
- Open
- In progress
- Completed
- Rejected
- Overdue

1. Not started: The start date is in the future, the task is not ready to begin.
2. Open: The task is ready to begin.
3. In progress: When 1 or more file or comment is added (Request Task) OR when, not all assignees have completed their actions (Signing, Approval, Action Tasks)
4. Completed: Task was completed and does not require any additional actions.
5. Rejected: When any of assignees rejected the task (Signing, Approval, Action Tasks)
6. Overdue: When a task is not completed, and the due date is in the past.

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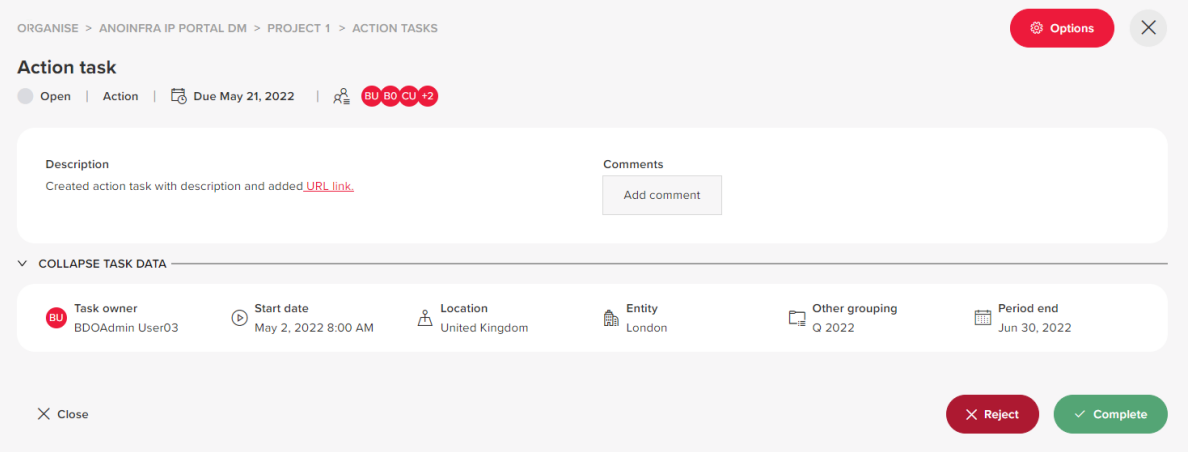


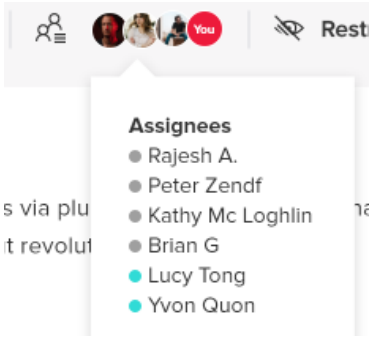

On the right side the Options button is displayed. User can choose to edit or delete the task. Under the task information, description field is displayed.

For the user, who created the task but is not assigned to the task, Reject and Complete buttons are not active (greyed out). And if there are no assignees Reject and Complete buttons are not active too.

It is possible to see which user already completed or rejected the task. However, it's difficult to understand what other users done so far. Assigned users will have circle icons indicating what they have done with the task.

An example of color coding used to describe the progress of the users:

| Color | Codes | User status |
|---|---|---|
| Grey | #DADBE0 | No action done by user |
| Blue/Green | #30dbd6 | Delivered |
| Orange | #FF5722 | Rejected |
| Green | #54a575 | Completed |




## 3.2 RESTORE A TASK

Files and folders in Templates and Uploads folders can be deleted from Documents page UI, if they do not have Read only setting. Deleted files and folders are moved to recycle bin, and it is possible to restore them as in Documents functionality.

If file is being deleted from Templates and/or Uploads section in Exchange NG, it should be deleted in respective folder in Documents as well. It is possible to restore the deleted files as in Documents functionality. Restored files are editable or read only depending on the task status.

If task is being deleted in Exchange NG, all of the related files and folders starting with Task name are deleted as well. It is not possible to restore deleted files, if task was deleted in Exchange NG.

If task files were deleted, and later task itself was deleted, the previously deleted files are stored in recycle bin and cannot be restored to the Exchange NG folder (Documents UI). Upon trying to restore, user receives an error message: There was an error restoring your item(s).

## 3.3 PROVIDE AN ATTACHMENT TO A TASK

In Exchange NG after choosing a project and selecting an already created RI, BDO and Client admins and users can add/see Uploads, so they could provide required documents.

Uploads section is available in the Request Type task overview page. If there are no files in the Uploads section, the count is 0 and the icon with the text is displayed: "Drop files here".

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Files and folders can be added by Upload button or drag and drop function.
When adding folder/folders with files to the Uploads section:

1. only one level folders can be added;
2. if nested folder is being added, system displays a warning: "The uploaded folder contains sub folder(s), this is not permitted. A folder only containing files can be uploaded here." No files are uploaded in that case.
3. files can not be added to the already uploaded folder;
4. folders and files are displayed in a file tree:
   - folders at the top of the list, in alphabetical order;
   - files within one folder listed in alphabetical order;
   - separate files, listed below the folders, in alphabetical order.

### 3.3.1 Uploading rules

1. File types depends on each Tenant settings
2. File size restriction applies the same as files in Documents (2GB).

Once the file is uploaded it appears in the list in Uploads field:

1. Uploaded file has a file type logo, name and options (in three dots icon):
2. More files can be added by browsing on Upload button or via drag and drop to the Uploads field.
3. Spinner should be displayed while file is being uploaded. If file was not successfully uploaded, the popup message should be displayed to explain the reason of the failure.
4. All files can be downloaded at once on Download **all** button. Files are zipped.
5. If more than 8 files are uploaded scroll appears.

When files are being uploaded, there should be this structure in Documents page:

1. every Project has a folder named Exchange NG by default (folder name is translatable):
   . In which, a folder is created with Task Group name, which is the same name as RI's Task Group:
      . In which, a folder is created with a Task name, which is the same name as RI Task's name:
         i. consist of two folders: Templates (translatable) and Uploads (translatable)

After BDO or Client user adds at least 1 file or comment in Task overview page, task status changes from Open/Not started to In progress. Change of status activates action buttons at the bottom of the Overview page:

1. for Client user and/or BDO assigned user button "Deliver request" is visible as active;
2. for BDO user buttons "Return" and "Complete" are visible as active.

### 3.3.2 Storing RI files to Documents

All templates and files uploaded through Exchange NG are saved in Documents page under a particular project.

Every Project has a folder named Exchange NG by default (folder name is translatable):

1. In which, a folder is created with Task Group name, which is the same name as RI's Task Group:
   . In which, a folder is created with a Task name, which is the same name as RI Task's name:
      i. consist of two folders: Templates (translatable) and Uploads (translatable)
      ii. special characters in the name like: !@#$%^&()_-+=[]{};'., is changed to underscore ( _ )

Each file has (i) icon to display Properties and the user is able to sort, download and search the files.

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User is not able to add additional file or folder from Documents UI to any of the Exchange NG folders. Exchange NG folder is not movable, as well as any of the folders inside of it from Documents page UI. Folder names cannot be edited from Documents page UI. Exchange NG structure folders (Exchange NG, Task group name, Task name, Templates, Uploads) cannot be deleted from Documents page UI.

If file name or task name is being changed in Exchange NG, then it is updated in Documents as well.

### 3.3.3 Download responses to RI

BDO users and Client users (also Readers) who have access to the project and task are able to access list view and select tasks.

User is able to download files from ONE project's Request tasks. If user does not have access to some Request task, files of this task will not be available for download. Only Request task documents could be downloaded. Download button is displayed at the right top of list view and active if Project does have at least one Request task, otherwise the button is greyed out and inactive.

If the Request task is empty, user will download empty zip. User is able to download all Project documents or only from selected tasks.

Download starts in the same tab (user sees a spinner, while download is being prepared); navigation to other places will not cancel the download process.

Files are downloaded in zipped folder (inside the zipped folder, structure is the same, as we have in documents page). Checkboxes ticks stay after doing a multiselect action, there is a possibility to select/clear with one click.

## 3.4 FLAG A TASK

Both BDO users and Client users with an access to the task can flag or unflag the task.
Reader users cannot flag/unflag. If a task has restricted access, only users with granted access can flag/unflag it.

As Signing and Approval tasks are visible in the list, even if they have restriction coming from Documents, it is possible to flag them. User is able to flag/unflag both tasks on a Portal level, and on Project level, this is applicable to all types of tasks: Action, Milestone, Request, Signing, Approval.

If one user flags/unflags the task, this change will be done on a task level, and same marking will be displayed for all users.

**Flagging should be visible:**

1. in an **Overview** page, under task title (first icon in the row); icon is not displayed for unflagged task;
2. if user hover over the icon, a text is displayed: "Flag indicates attention is required, Flag/Unflag is available under the Options button"
3. on a **left side menu**, next to each flagged task (in front of a status dot);
4. in tasks **list view**, as described in these US:

User should be able to **Group Tasks by flag**:

1. **Flagged** option should be available in Group Tasks by dropdown;
2. If user selects Flagged option, menu should show 2 folders with flagged and unflagged tasks:

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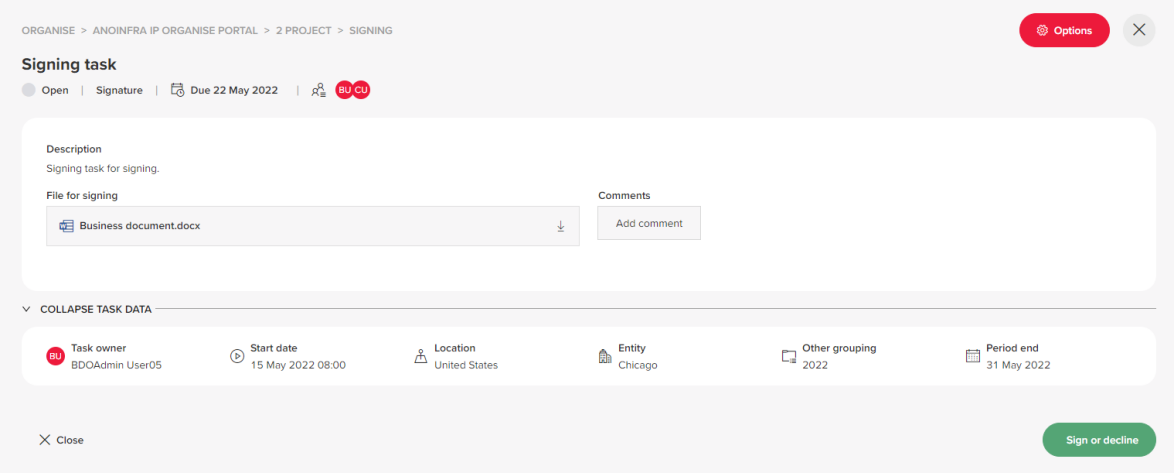
a. flagged folder shows task list of flagged tasks listed by due date, with earliest due date on top.
b. not flagged folder shows tasks list of not flagged tasks listed by due date, with earliest due date on top
c. if there are no flagged tasks, folder is not displayed;
d. folders will be displayed within project.

# 3.5 DOCUMENT ACTIONS

## 3.5.1 Signing and Approval overview page

Choose the project and open created Signing/Approval task. In the Task overview window under the task title information about the task is displayed:

- Status
- Task type
- Due date
- Assignees




On the right side the Options button is displayed. User can delete the task. Under the task information, description field is displayed. User can expand more task data to see the additional task information:

- Task owner
- Start date
- Location
- Entity
- Other grouping
- Period end

At the bottom of the Signing task overview page for users, who are assigned to do the task, Sign or decline button is displayed.

At the bottom of the Approval task overview page for users, who are assigned to do the task, Reject and Completed buttons are displayed.

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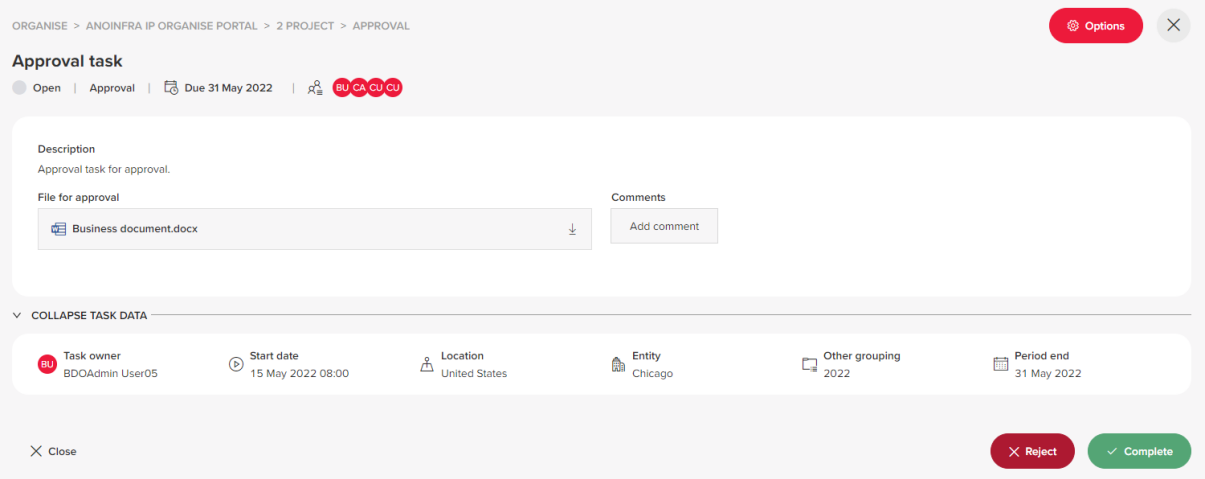
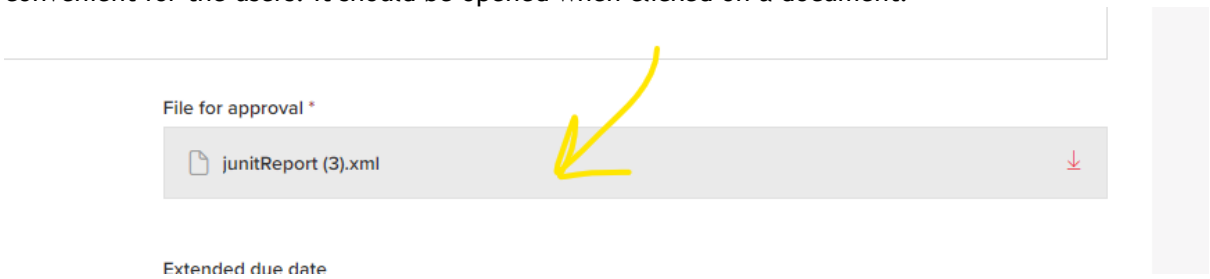



For the user, who created the Signing task but is not assigned to the task, Sign or decline button is not active (greyed out). For the user, who created the Approval task but is not assigned to the task, Reject and Complete buttons are not active (greyed out).

### 3.5.2 Document signature and approval

Currently Signing and Approval tasks' files are downloaded when clicking on the file area, which is not convenient for the users. It should be opened when clicked on a document.




# 4. ARCHIVING EXCHANGE NEXT GEN

## 4.1 DOWNLOAD TASK HISTORY REPORT

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 now able to download “Task status change” report via Options -> Download report -> Task status change.

By performing these actions users download an excel file containing all history logs that have happened with the particular task.

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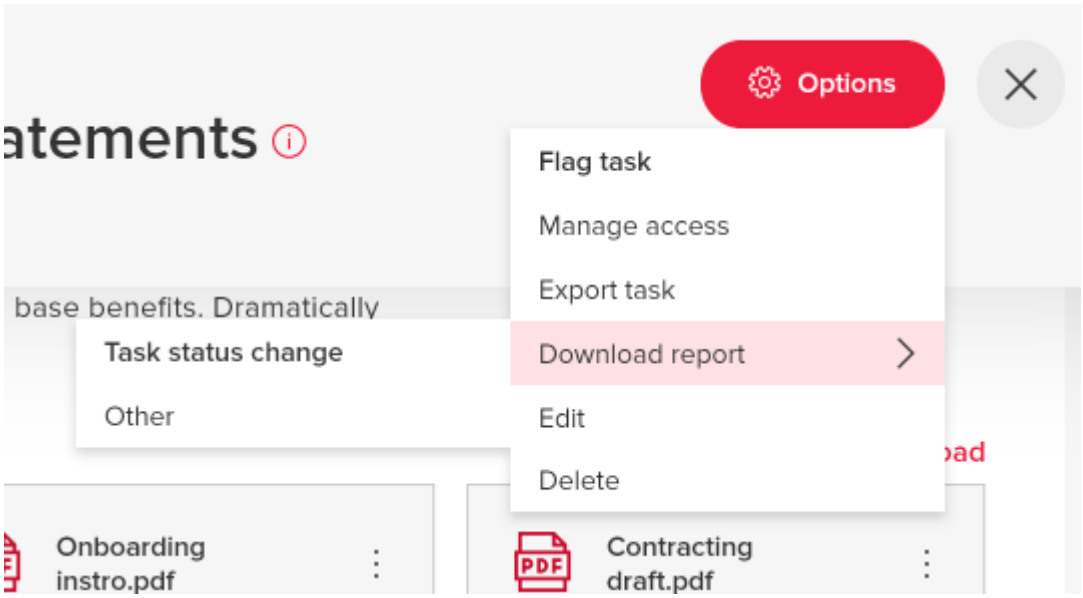


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