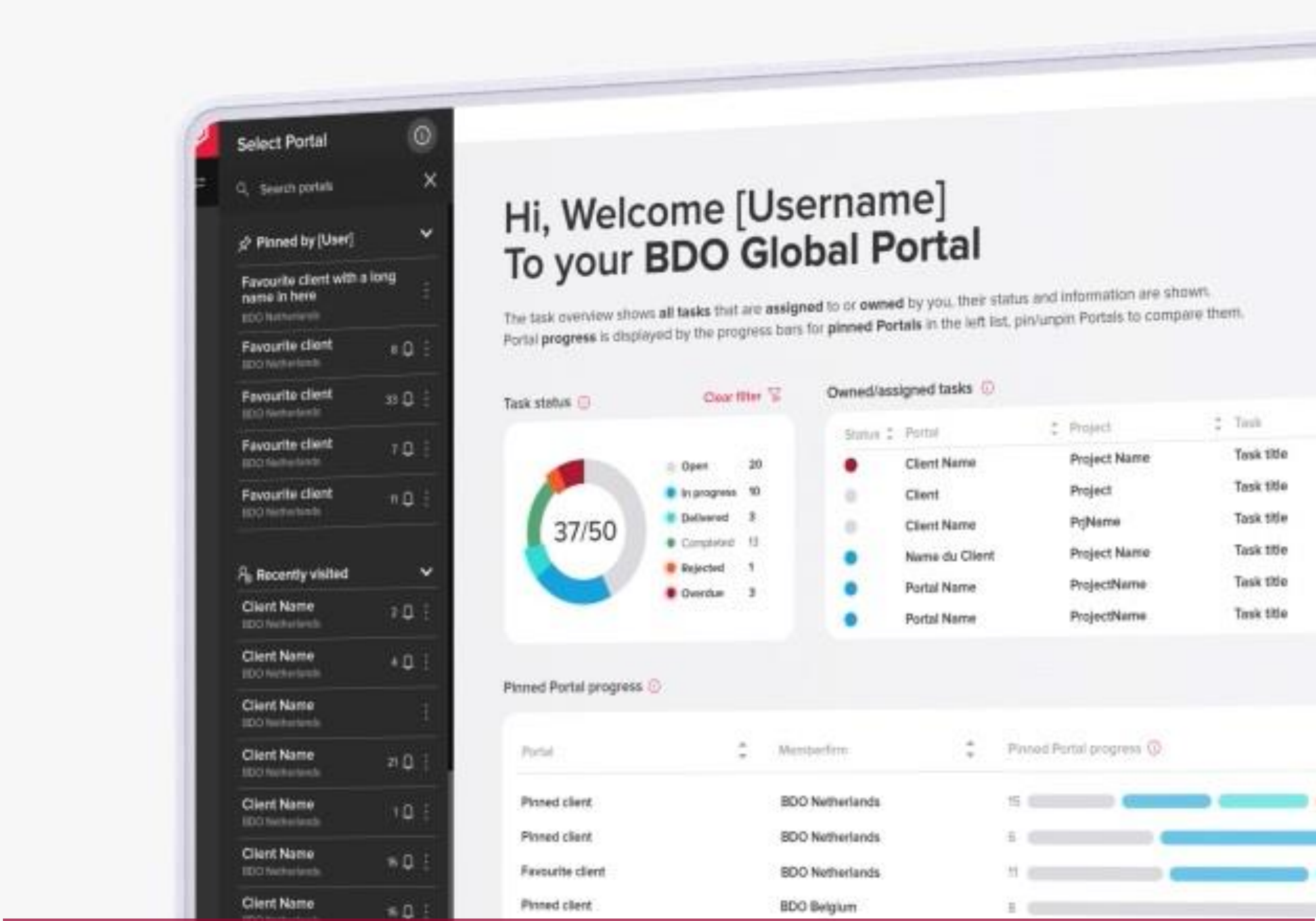


GLOBAL PORTAL

Client User Guide

17 April 2025

CONTENTS

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
2.1	January 2025	Raminta Pociute	Updated document based on Release 5.7
3.0	April 2025	Maria Peicheva	Updated document based on Release 5.8. Exchange Next Gen replaced with Tasks. Updated screenshots.

REVIEWER

Name	Version	Date
Maria Peicheva	2.0	6 December 2024
Maria Peicheva	2.1	24 January 2025
Kornelija Samardokaite	3.0	17 April 2025

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.

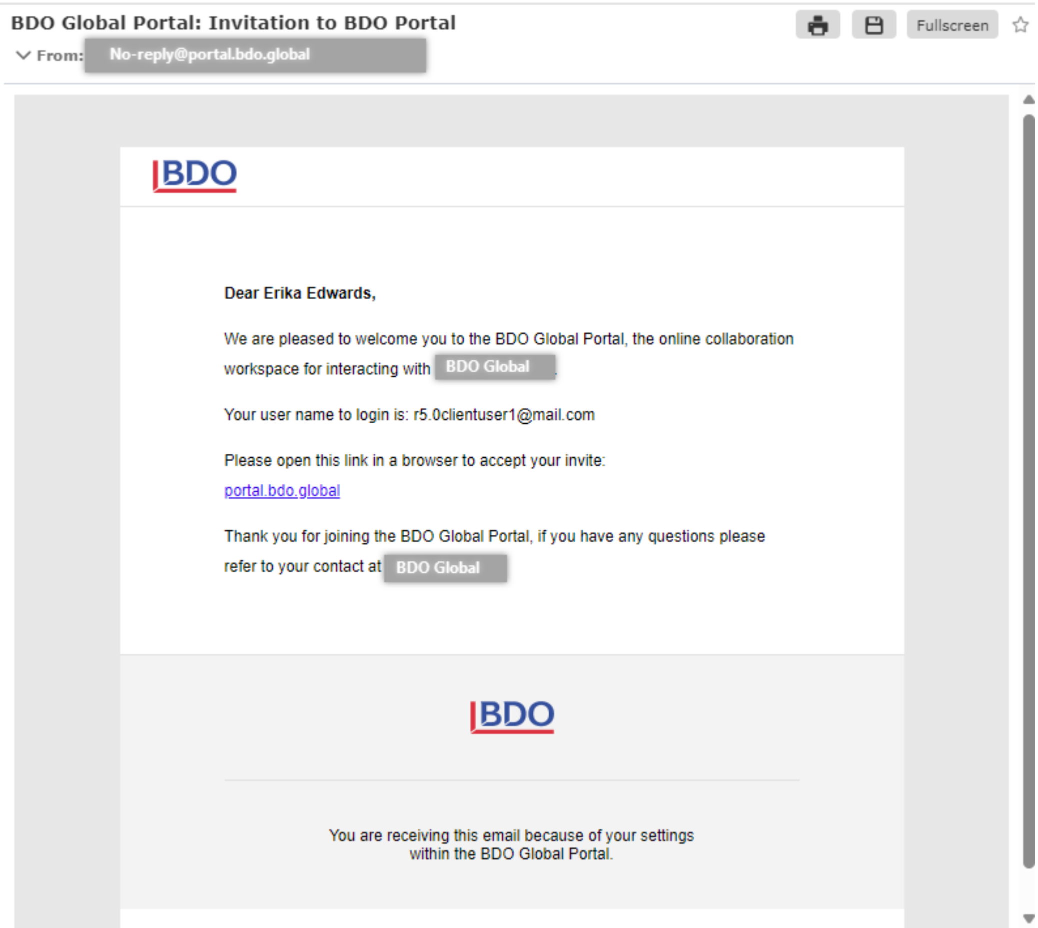
By working in partnership with Microsoft, an online collaboration space has been developed that allows BDO advisers and their clients to embark on a truly digital relationship that can last for a client's entire lifetime with BDO.

2. PORTAL LOGIN

2.1 Login via an email invitation

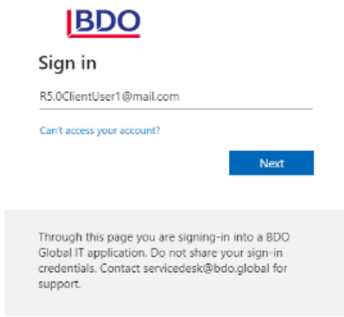
If you are a new user, you can access Global Portal only after you have been invited by your BDO contact. You will receive an email invitation which you need to accept to be able to log in to Global Portal. A sample email is provided in the below screenshot.

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.

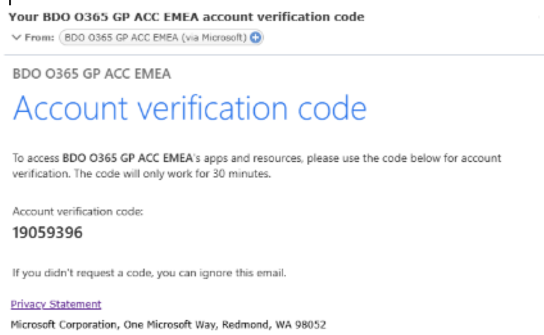


To accept the invitation, click the **portal.bdo.global** link in the invitation email and type in your email address in the authentication window.

- 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.



See an example of a one-time password email:


Your BDO O365 GP ACC EMEA account verification code

From: BDO O365 GP ACC EMEA (via Microsoft)

BDO O365 GP ACC EMEA

Account verification code

To access BDO O365 GP ACC EMEA's apps and resources, please use the code below for account verification. The code will only work for 30 minutes.

Account verification code:

19059396

If you didn't request a code, you can ignore this email.

Privacy Statement

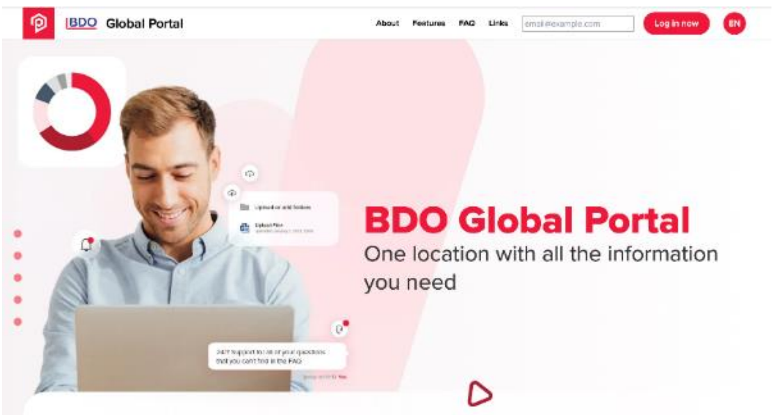
Microsoft Corporation, One Microsoft Way, Redmond, WA 98052

- 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.

For more information on MFA, please refer to Microsoft's [Authentication methods in Microsoft Entra ID - phone options] article.

2.2 Login via the global landing page



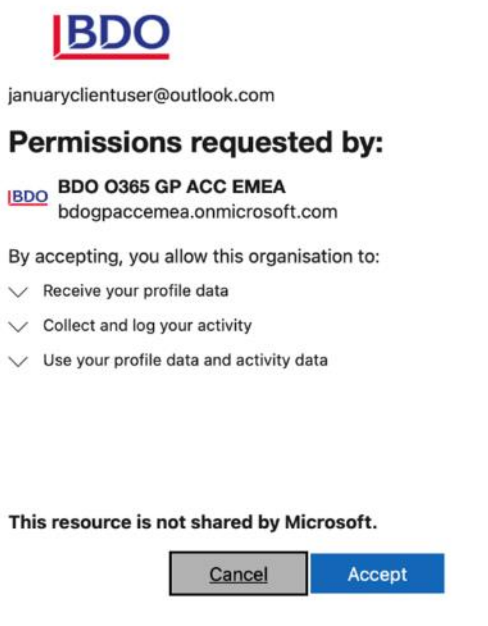
Visit https://portal.bdo.global. Enter your email address and click the **Log in now** button. You will be redirected to the BDO login and authentication page where you need to log in with your email and password (see above).

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

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

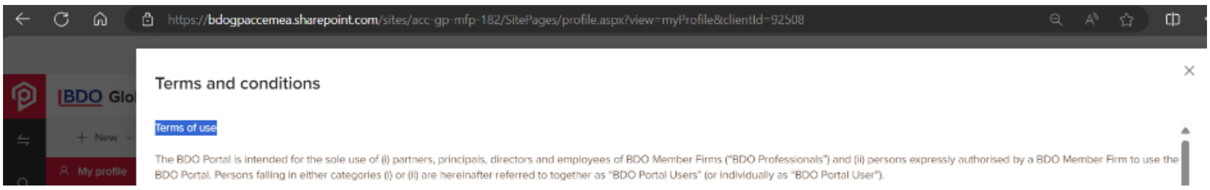
2.3 Permissions prompt

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 Microsoft's [Consent experience for applications in Microsoft Entra ID]() 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:

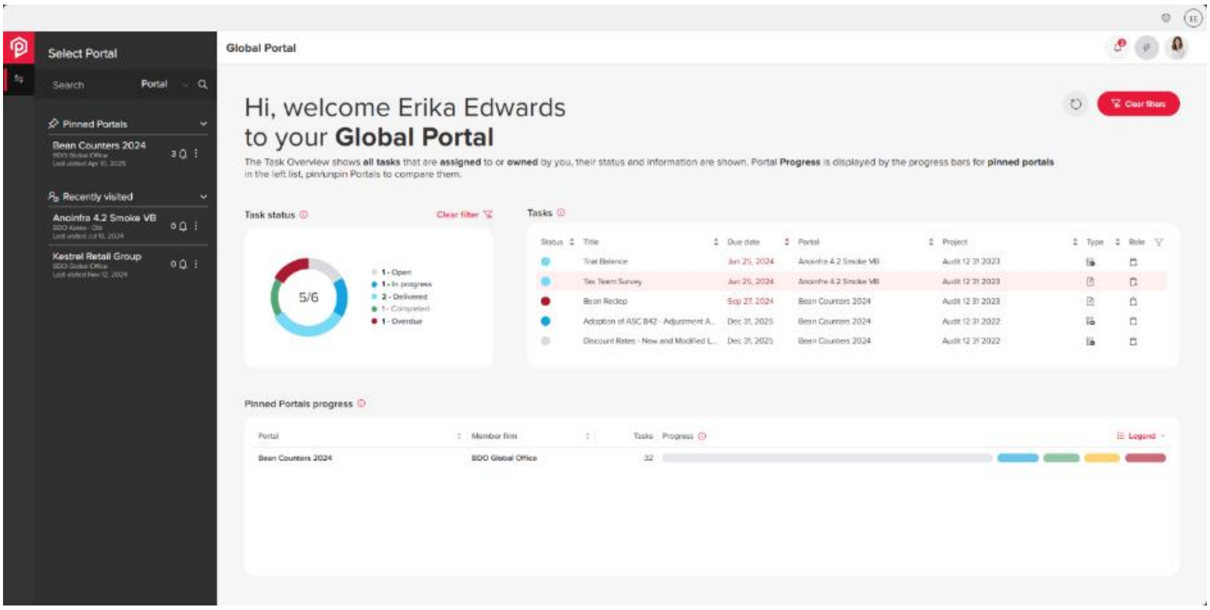


For more information on the initial setup visit the chapter on *Personal settings*.

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 **Welcome page** 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.



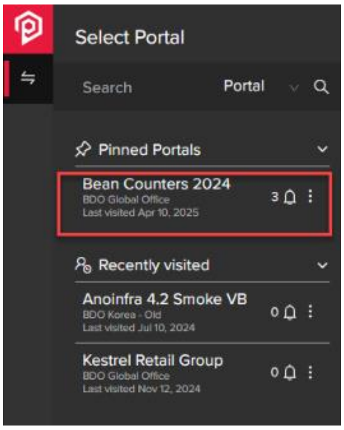
If you have access to **only one Portal**, you will be directed to the Portal's **Home page** (see below).

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

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

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

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.

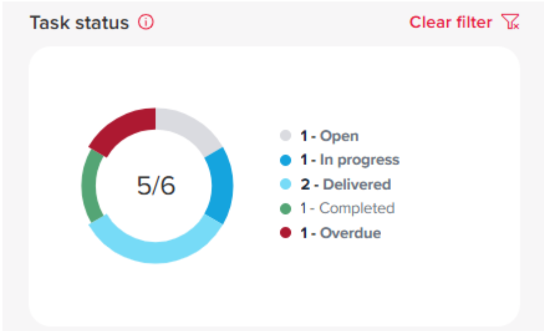
Note: On the right side of each Client Portal there is a notification bell indicating the unread notifications count for that Portal.

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.

Note: If you are assigned to Portal(s) without enabled **Tasks**, you won't be able to see any task content on the Welcome page. Navigate to your Portal and go to the **Documents** page to exchange files with BDO.

3.1 Tasks status filter

The **Task status** filter shows only the statuses of tasks assigned to you and the number of tasks per status. 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 filter displays just that one status.



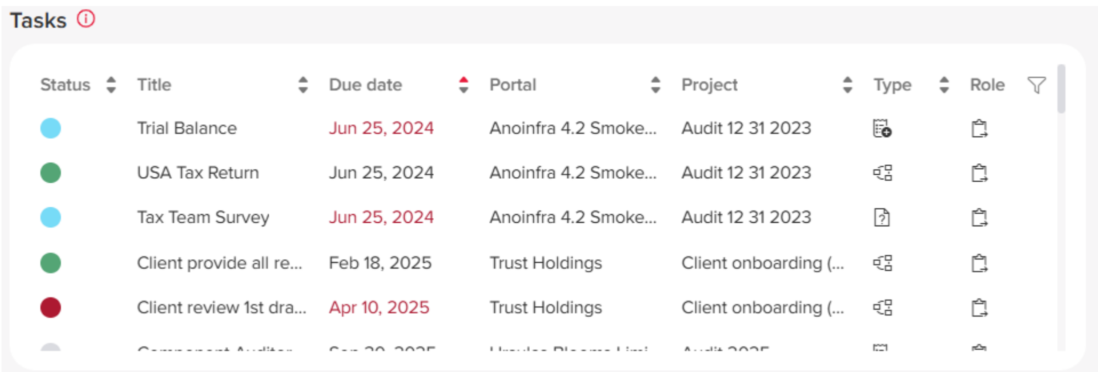
TASK STATUS NAME	TASK ACTION
Not Started	*The task Start Date is in the future*
Open	*The task Start Date is in the past*
In progress	*When 1 or more file or comment is added (Request Task) OR not all assignees have completed their actions (Signing, Approval, Action Tasks)*
Delivered	*All information 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*

Click the **Clear filter** button to clear selections in the **Task status** and **Task** dashboards and see all tasks.

3.2 Tasks dashboard

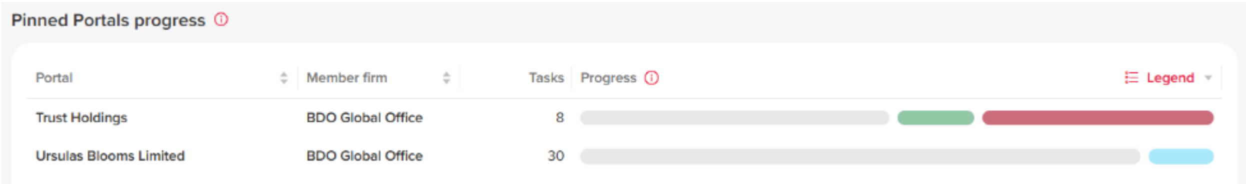
The **Tasks** dashboard shows a task list with the following columns: Status - a coloured bubble (hovering on the bubble shows the status name), Title, Due date, Portal, Project, Type, Role.

Click a task's title to open the task.



3.3 Pinned Portals progress dashboard

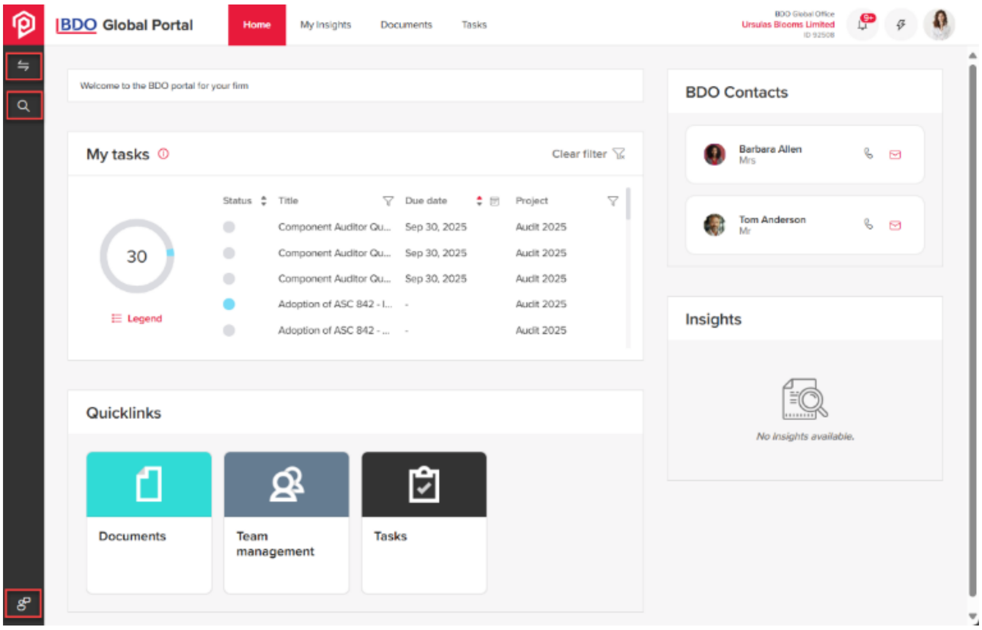
The Pinned Portal progress dashboard shows data for portals you pinned for quick access via the black sidebar.



The coloured pills are ordered left to right depending on the status of tasks. The size of the pill corresponds to the number of tasks with this status. Clicking on pills will take you to the Tasks page.

4. PORTAL HOME PAGE

The Portal Home page is the place where you can start reviewing the tasks you have been assigned to, or go to the **Documents** page and start collaborating on files. This page is customizable and can contain additional buttons or links to systems and tools offered by BDO.



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*.

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.

4.2 Main navigation menu

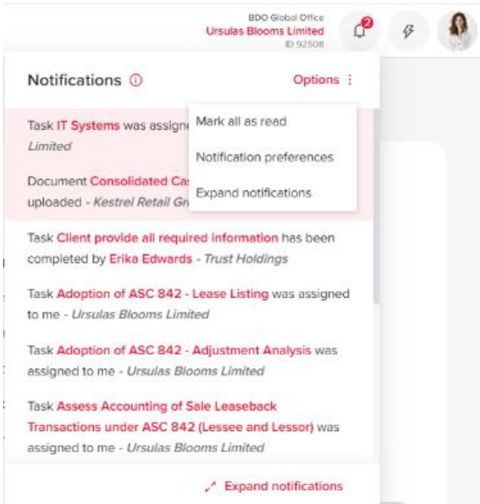
The main navigation menu on the top part of your screen is customizable and contains:

1. **Links**: **Home**, **My Insights**, **Documents**, **Tasks**, 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 notifications, team, and personal settings.

Click the Notifications **Bell** icon to review notifications about changes made to your projects and tasks, such as status changes, uploaded files etc. Under **Options** in the **Notifications** 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.



Click the **Lightning Bolt** icon to access the **Team management** page. If you have the Client Admin role, you can manage your team's access to specific projects in this portal.

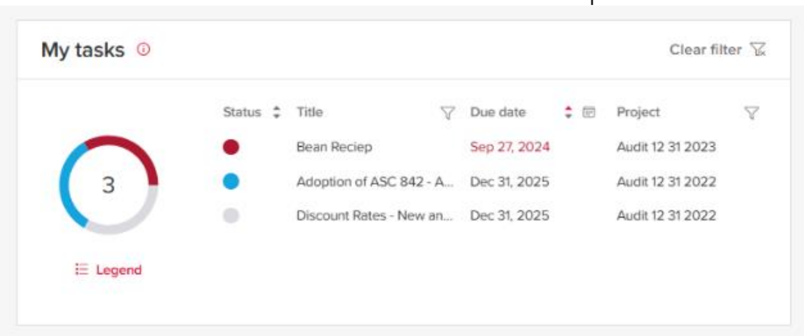
Click the **Profile photo circle** icon to access your **Personal settings**, revisit **Virtual tour**, **Coaching**, **Terms and Conditions** or **Log out**.

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.



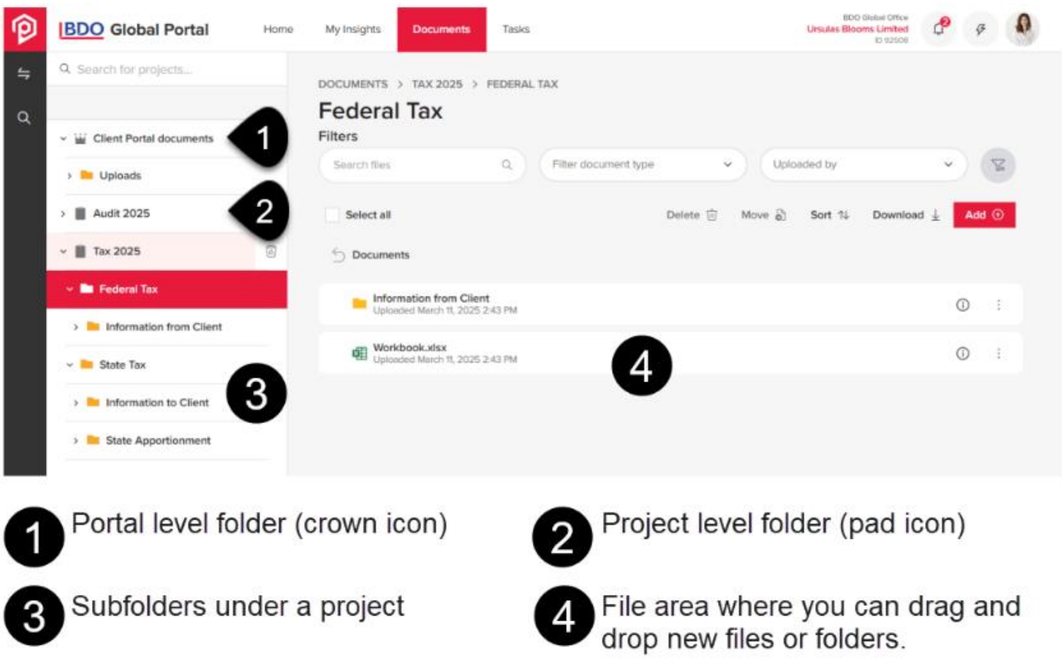
4.5 Quicklinks

The **Quicklinks** block appears under the dashboard and can vary per portal. Links in this block can direct you to pages 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 (signified by the pad icon) using the navigation on the left.

Note: The **Documents** library may be turned off and altogether missing from the main navigation menu. If your BDO contacts are sending you task requests only in **Tasks** (see below), you need to navigate to the **Tasks** page (previously called "Exchange Next Gen").

5.1 Documents structure

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

Project folders that were created in **Tasks** 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 (signified by the crown icon). If you need to upload files, please browse to the corresponding project folder or subfolder (signified by the folder icon).

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.

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 actions 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,.preview,.xslt,.jpeg,.xlsm,.htm,.docm,.xps, .mp4,.7z,.log,.xlm,.pptm,.zipx,.csv, .qbw, .qgw, .qba, .qbb, .qbm, .qbx, .sdb, .sdw, .sai, .saj, .abk, .aga, .agacc, .agaccbackup, .agacctransfer, .agex, .agexbackup, .agextransfer, .qdf, .sie, .se
While uploading a document, you can continue working with other files.

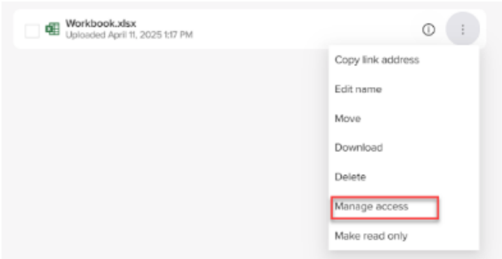
Tip: If you need to upload a file of a type that is currently not supported, you can try zipping the file(s). Please reach out to your BDO contact, if the file(s) you are uploading are not accepted.

5.2.2 Characters support in file names

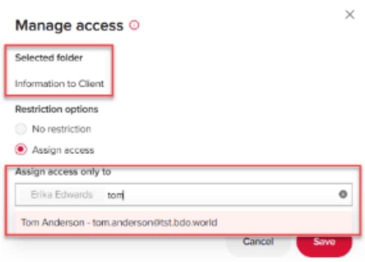
- English alphabet is supported
- Norwegian alphabet is supported
- Hebrew alphabet is supported
- File names cannot contain any of the special characters: " * : < > ? / \ ~ |. If the upload contains the characters, an error message is displayed and it is not possible to proceed.
- Each document name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

Access to a document or a folder can be restricted by managing its access to a select amount of people. Only Client Admin users (on either portal or project level) can use the **Manage access** option in **Documents**. An Access restricted icon (lock) appears next to restricted files.

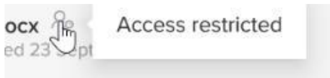


Click the **Manage access** option to open a new window to set accesses. Two toggles appear:



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

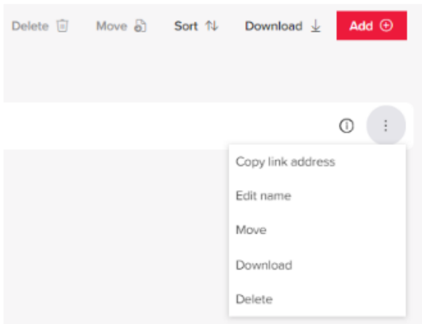
The user who is managing the restricted accesses for the folder, cannot remove themselves from the list. When a folder gets its access restricted, it is marked with a lock icon.



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

5.4 Edit a document

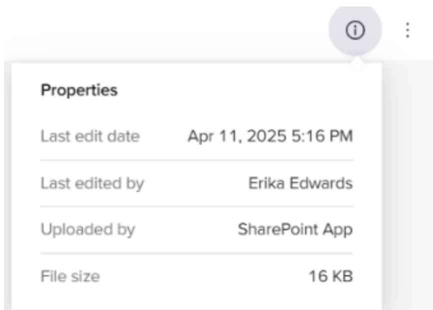
Documents that were uploaded directly to the **Documents** library, can be edited if this is allowed in your project settings. If you can open the documents in your browser via the online M365 apps, you can edit, and your changes are automatically saved.



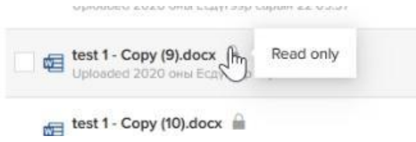
If viewing files online is not supported, an option to download the file appears.

Manage documents and properties via the options next to the Add button or under the ellipsis button ⋮ .

Click the ⓘ info button to view **Properties**.

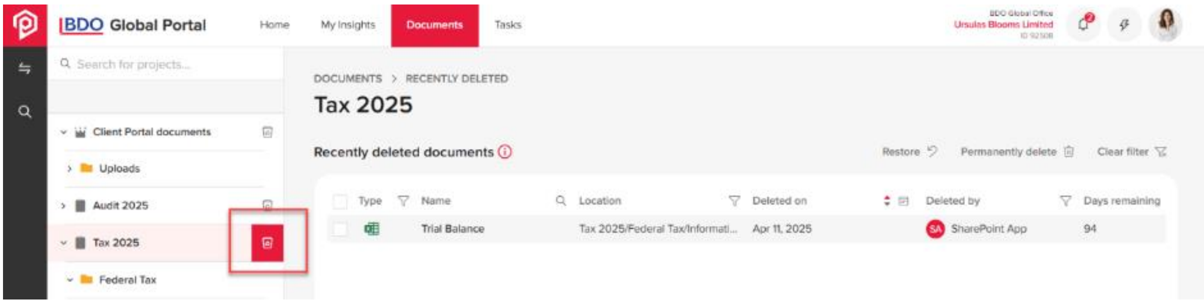


Note: A document is in Read-only mode when there is a lock icon next to its name. It means that all users can only view the file and not edit it. This ensures that the document remains unchanged and accessible for viewing by everyone.



5.5 Delete files and folders

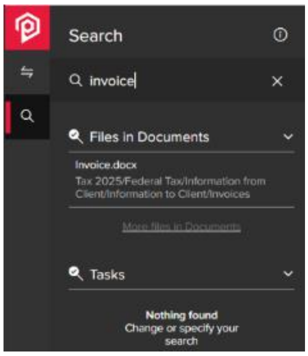
Files and folders can be deleted, if they are not read-only. Deleted files and folders are moved to the recycle bin where they stay for 94 days. In the **Recently deleted** page files and Folders can be restored to the original directory or permanently deleted.



5.6 Search documents

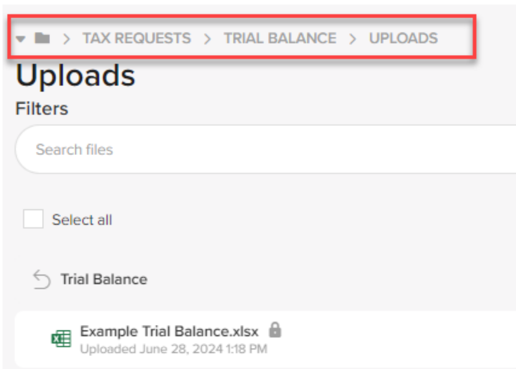
You can search for specific files from any location on Global Portal. Insert the search term next to the search icon. Folder names do not appear in search results.

***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

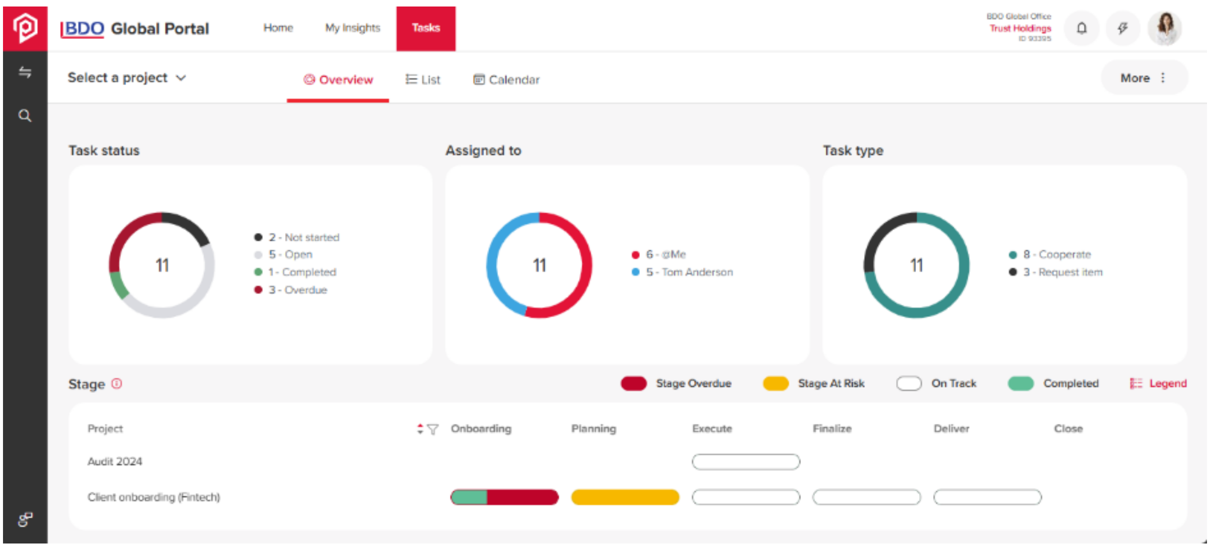
Note: *In April 2025 the **Exchange Next Gen** page was renamed to **Tasks**. If you are looking for your tasks, navigate to the Tasks page via the main navigation menu or the Tasks dashboards on the Portal home page. In some instances, Exchange Next Gen references in menus and messages can still be preserved.*

In April 2025 (Release 5.8), numerous improvements to navigation and the overall look and feel have been made to enhance the user experience on the new Tasks page. Existing users will note the below changes:

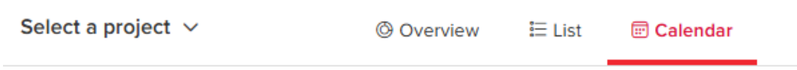
- List view in Tasks to be the default view
- Left-side menu can be hidden (accessible via the 'Select a project' menu)
- Separate columns for Follow, Flag, Export, and Restricted access.
- Task Filters and Navigation:
  - Filters are now integrated into each column on the Tasks page, allowing for more granular filtering options. Filters are indicated in red when applied and can be cleared individually or all at once.
  - Filters applied in the list view are retained in the calendar view and overview page. Overview page can also be used to apply filters to other views.
  - Tasks in the Calendar view can be filtered similarly to the List view. Navigation through tasks is possible using arrow buttons, and the selected task is highlighted in red.
- Split Screen Task View:
  - A split-screen view allows users to see task details while still interacting with the task list. Users can navigate through tasks using arrow buttons, and the view can be expanded to full width.

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

The **Tasks** page provides a secure place to upload your documents combined with interactive dashboards to monitor any deliverables you and your team still need to provide.



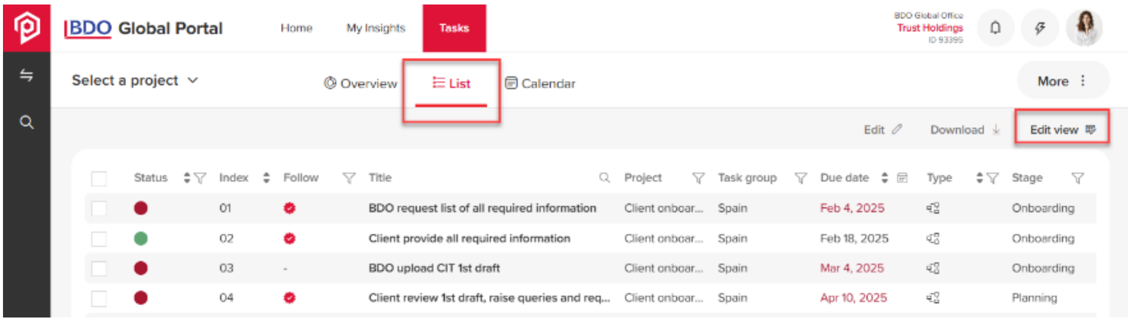
The **Tasks** page has three main views: **Overview**, **List** (default), and **Calendar**. Select a view under the main navigation menu. The view you are currently in is coloured in red and underlined:



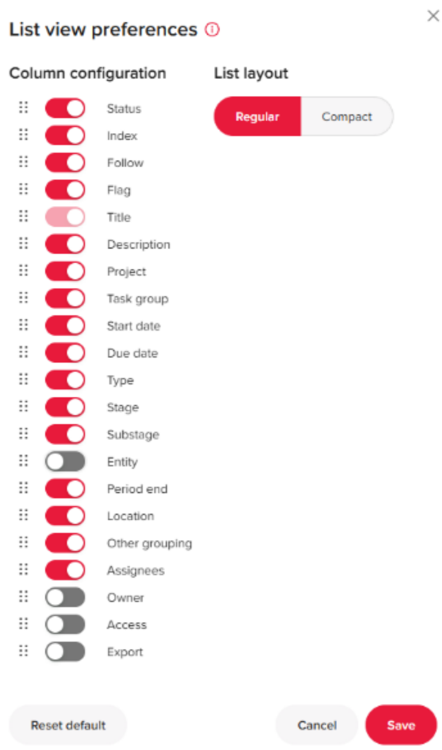
Use the **Select a project** menu on the left, if you want to filter tasks on a specific project (for example *Audit 2024*).

6.1 List view

The default **List** view will open, when you navigate to **Tasks** via the main navigation menu. It displays tasks in a table.



Customize the columns in the table view via the **Edit view** button. A **List view preferences** dialog will open. Click the toggle buttons next to each column's name to turn them on (red) or off (grey).

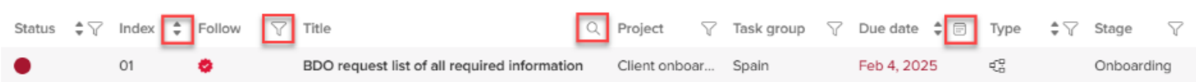


Change the order of the columns by clicking on the dots icon and dragging each column up or down.

Reset the view by clicking the **Reset default** button.

Don't forget to scroll down and click the red **Save** button to save your preferences.

6.1.1 Advanced filters in List view



Use the table's headers to sort, filter, search by keyword or select dates in a calendar picker.

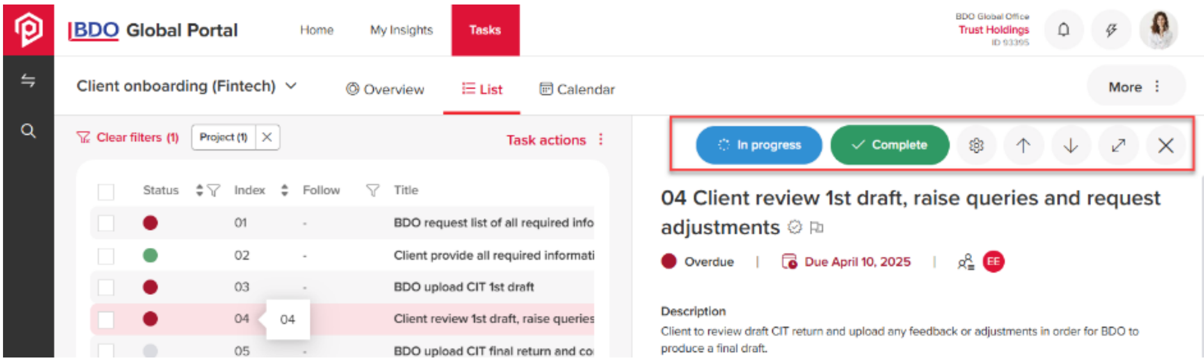
Click the Clear filters (2) dynamic option to clear all applied filters. The option does not appear, if no filters are applied.

Note that the filters are kept while changing views between **Overview**, **List**, and **Calendar**.

6.1.2 Tasks split view

Click a task's row and the task opens next to your list. The selected task's row gets highlighted in light red and you can preview it in a split view on the right.

Review task details or perform actions using the top menu buttons.



If you'd like to see an expanded view of your task, click the button with the two arrows . This will give you more space on the screen to perform more complex work. For more details on what you can do within a task, see *Task actions*.

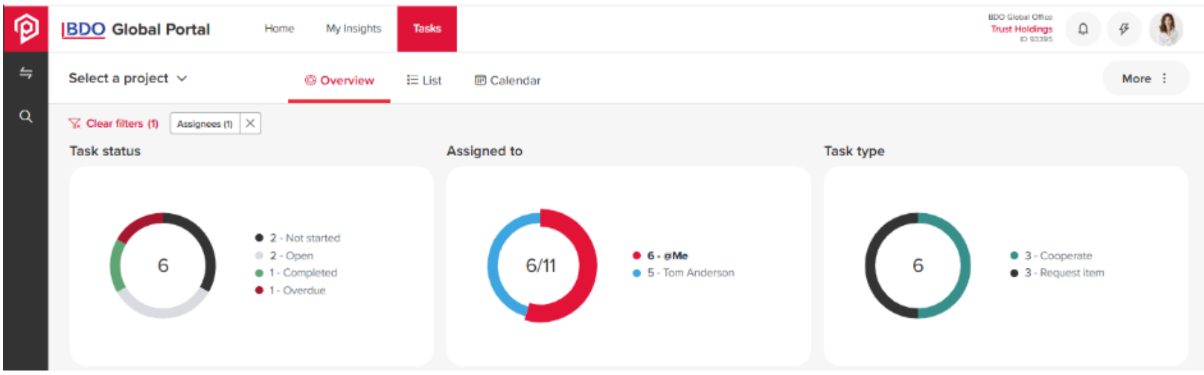
6.2 Overview view

The **Overview** contains two rows of graphical filters and navigation: three doughnut filters: **Task status**, **Assigned to**, and **Task type**, and the **Stage** progress dashboard.

- Use the doughnut filters, if you'd like to limit the tasks you need to process.

To the right of each doughnut, you can see a list of the available data. Click on a coloured portion or on the labels themselves to filter tasks you'd like to start working on (for example **@Me** in the **Assigned to** doughnut filter – see the below screenshot).

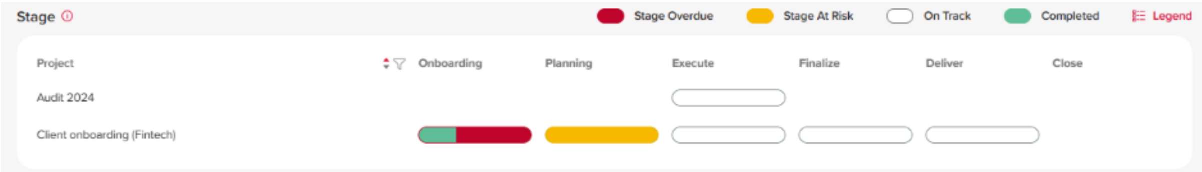
Note that you can view tasks assigned to other users, but you are not able to process them.



Once you apply your filters, navigate to the **List** view to start processing your tasks or head to the **Stage** progress dashboard to further refine your tasks.

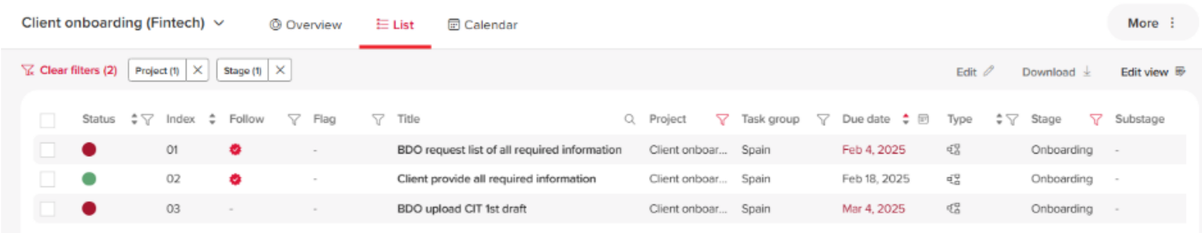
6.2.1 Stage progress dashboard

Click on the stage pills to open relevant tasks in the List view.



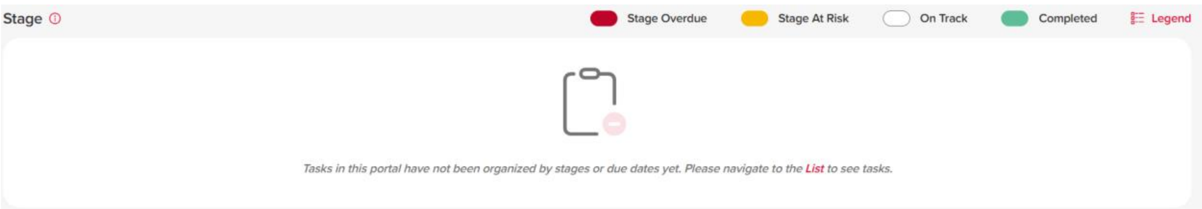
The **Stage** progress dashboard has been designed to help you identify the stage of your engagement and focus areas. Click on a project's stage (Onboarding, Planning, Execute, Finalize, Deliver, Close) and you will see a list view of the tasks in this stage.

Here is the view that opens, if you click the green-red pill in the **Onboarding** stage of the "Client onboarding (Fintech)" project:



If you'd like to view tasks in the next stage, you can either return to the **Overview** and select a different pill, or filter on the **Stage** column in the **List** view.

Note: Some portals may not have data about stages. To see all the tasks available in this portal, go to the **List** view. In such cases you will see the below message and link that will take you to the **List** view.



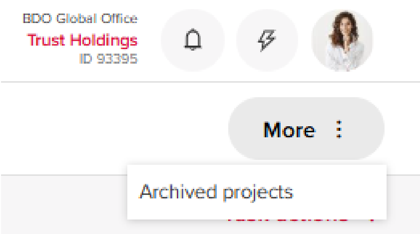
6.3 Calendar view

If you choose the **Calendar** view, a default monthly view appears. Switch from monthly to annual view by using the **Month | Year** button on the top right corner.

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

6.4 More

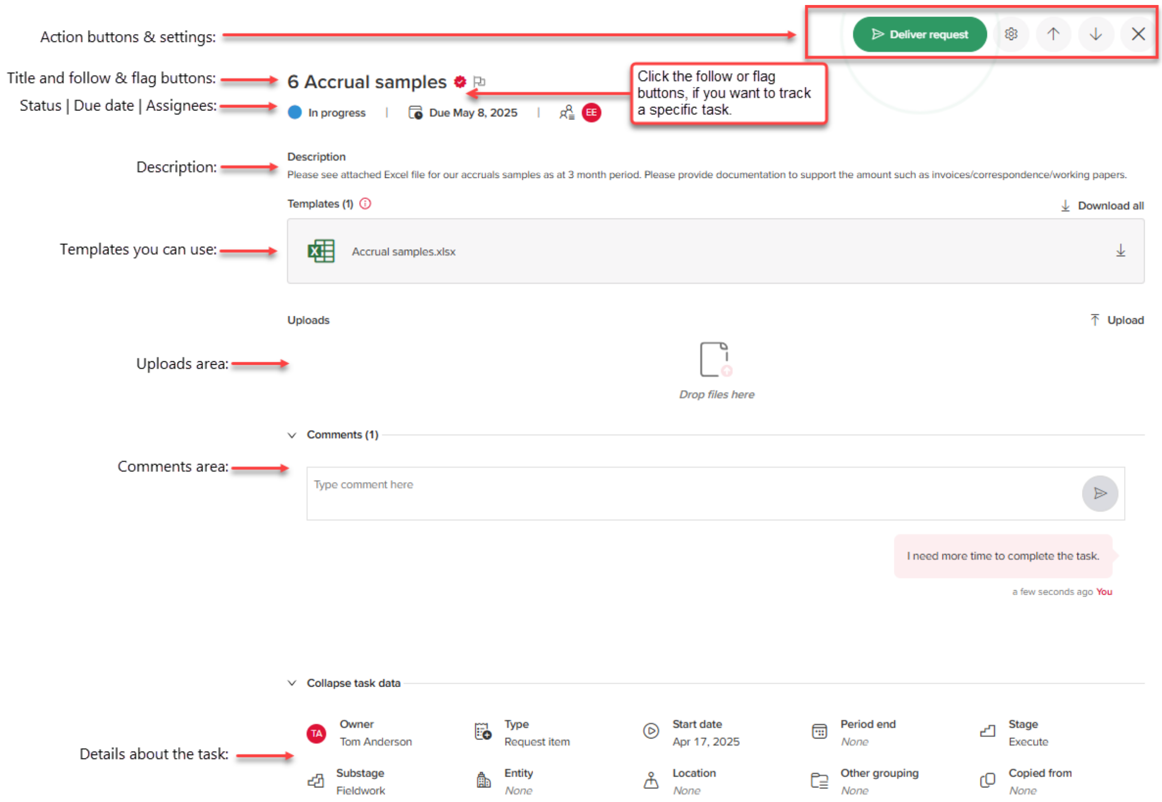
In the right top corner of the **Tasks** page there is a grey button **More**. It lists the option to open the **Archived projects** page and consult old projects that have been archived.



7. TASK ACTIONS

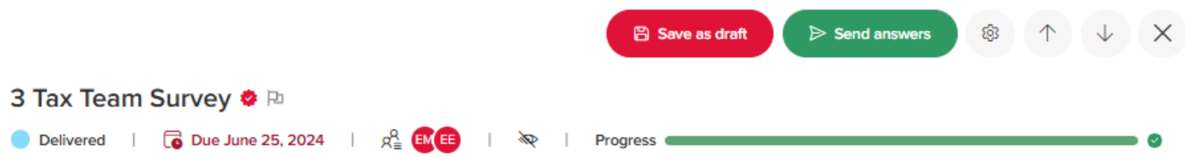
Your BDO adviser will assign to you tasks that will require you to upload files, provide signatures or answer questionnaires.

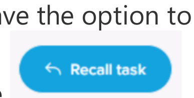
Once you open a task from the **List** view, start exploring the task's title, description and templates. Note that all documents attached to a task can be previewed in your browser. There are download links on the task itself in case you need to have a local copy.



When you are ready to fulfil a task, upload the requested documents in the **Uploads** area or use the **Upload** button. Use the comments area to discuss a task with your BDO team. Type the **@** character to mention a specific contact.

Don't forget to click the green **Deliver request** button. Depending on the task type the action buttons at the top of the task can vary:



For tasks of the Request item type assignees also have the option to recall it. You can recall an already delivered task to continue working on it via the blue 

button. The task should become 'In progress' (or Overdue, if its due date is in the past).

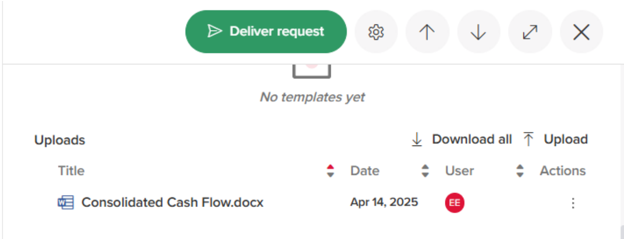
7.1 Upload files/folders to a task

Rules for adding folder/folders with files to the **Uploads** section are:

1. Only one-level folders can be added;

2. If a nested folder is added, the system displays a warning: "The uploaded folder contains sub folder(s), this is not permitted. A folder only containing files can be uploaded here."
3. Files cannot be added to the already uploaded folder;
4. Folders and files are displayed in a file tree.
5. Allowed file extensions depend on each Tenant setting. Reach out to your BDO contact if you need to upload a file that has a different extension than the ones listed in *File 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*. Changing the status activates the action buttons at the top of the task: and the **Deliver request** button is visible as active. Buttons for delivering tasks may vary depending on the task's type. Once you upload all files requested, don't forget to click the coloured buttons to submit the task to your BDO team.



7.1.1 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 in both Tasks and Documents pages.* *If you add additional file to uploads, task status goes back to In progress. All files become editable, until user clicks on the Deliver request button again, and makes task status Delivered, with all files in read-only mode.*
Completed	*All files in Uploads and Templates become read-only both in Tasks, 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 Tasks folder in Documents 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 task (when it is Complete or Delivered).

7.1.2 Storing Tasks files to Documents

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

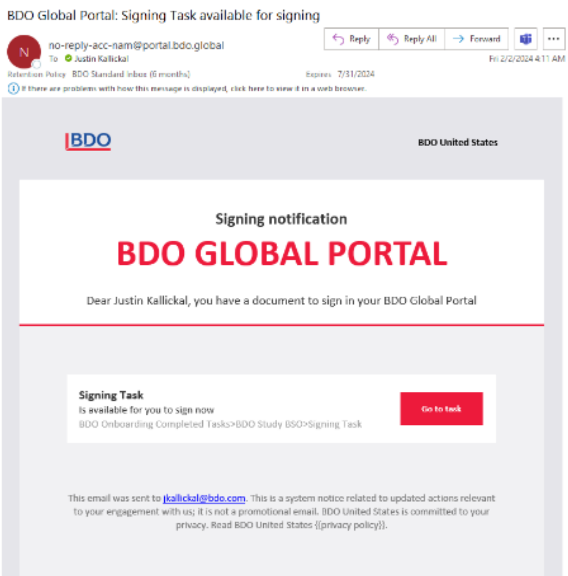
You can't add additional files or folders from the **Documents** page to any of the Tasks folders. Folder names cannot be edited from the **Documents** page. Tasks structure folders (Tasks, Task group name, Task name, Templates, Uploads) cannot be deleted from **Documents** page.

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

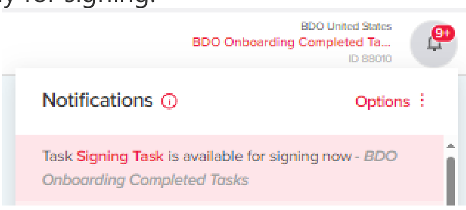
7.2 Signing and Approval tasks

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

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

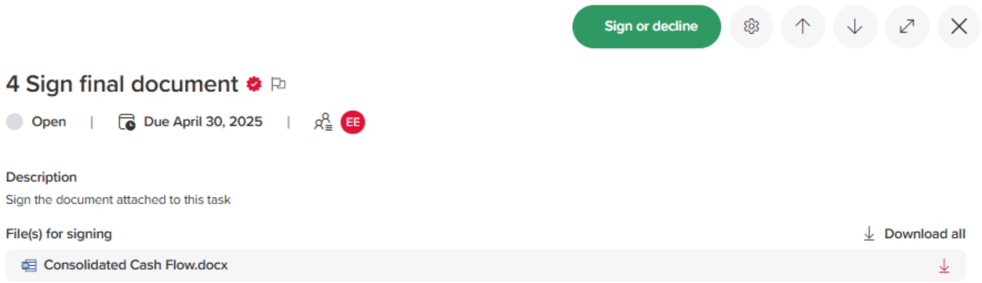


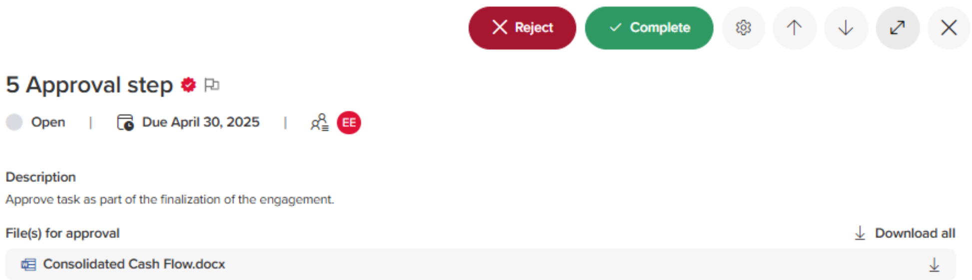
In addition to the email notification, you will also get a bell icon notification on Global Portal indicating that there is a signing task ready for signing.



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

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



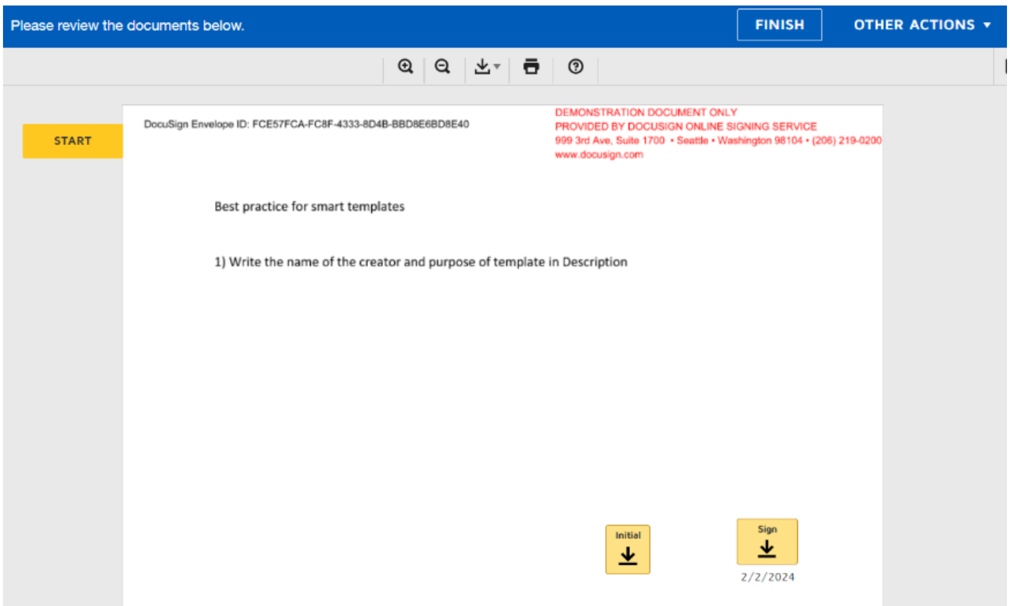


Please note that if you are on the ordered list and there are other assignees above you who have not signed the document yet, the **Sign or Decline** button will be greyed out with the message "Assignees prior to the current user have not signed or declined the task."

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

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

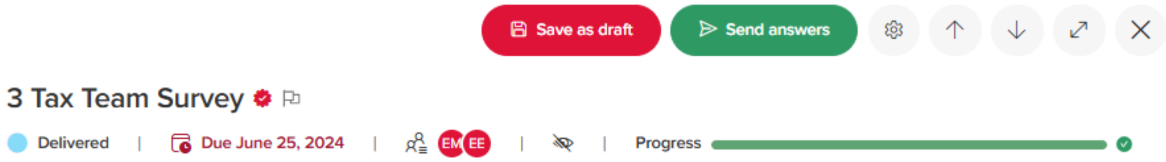
Once you are in the DocuSign platform, you have the option to click on **Start** and the system will highlight the areas where you need to provide your initials and signature.



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

7.3 Answer a Survey task

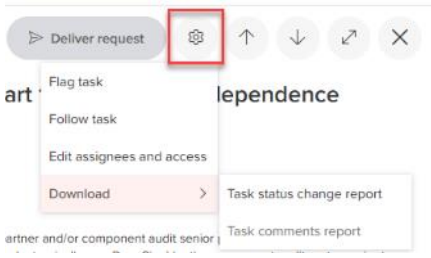
Survey tasks are designed to collect information outside of documents, such as dates, names, addresses, or amounts.



Fill out the survey by completing the different types of questions. In some answers you will be able to attach a file to your form. Don't forget to click the **Send answers** button on the top of the survey when you are ready to submit it. If you need more time, you can click the red **Save as draft** button and complete the survey later.

7.4 Actions in tasks

The round button with the gear icon in all tasks' headers allows you to:

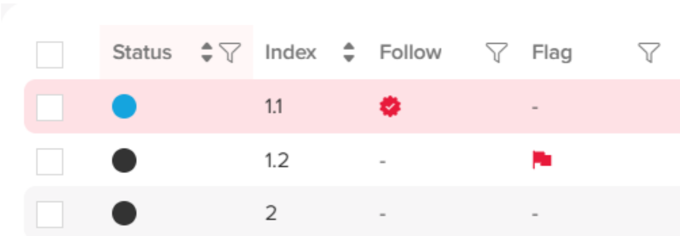


- Flag/Unflag a task
- Follow/Unfollow a task
- Edit assignees and access *(Client Admins only)*
- Download *Task status change report* and *Task comments report*. For Signing and Approval tasks there is an additional option *Signing/Approval logs*. In Survey tasks you can download the task in Excel and PDF format.

7.4.1 Flag a task

Flagging a task via the **gear button** or the flag button next to the task's title indicates that you'd like to draw attention to this task.

The activated flag will appear in red next to the task's title and in the List view to all users with access to the project:



Use the filter in the **Flag** column in **List** view, if you'd like to filter on flagged tasks.

To unflag a task, open the task and click the red flag button next to its title or select **Unflag task** under the gear button.

7.4.2 Follow a task

Following tasks via the **gear button** or the  check button next to the task's title enables direct access to tasks that are relevant to you, eliminating the need to navigate through unrelated tasks.

The activated follow check will appear in red next to the task's title. Only you will be able to see your own followed tasks in the List view.

Use the filter in the **Filter** column in **List** view, if you'd like to filter on followed tasks.

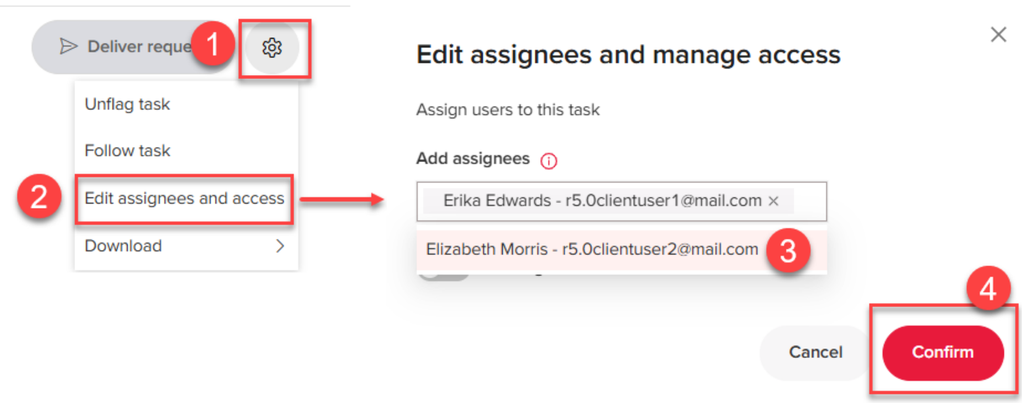
To unfollow a task, open the task and click the red check button next to its title or select **Unfollow task** under the gear button.

7.4.3 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

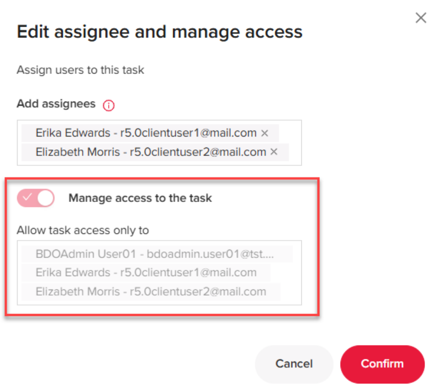
Open a task, click the gear button, select **Edit assignees and access**. A pop-up **Edit assignees and manage access** opens.



You can add/delete yourself and other Client-side users in the **Add 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.

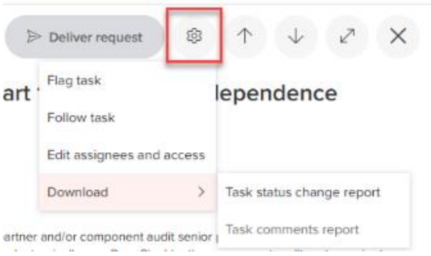
Assignees are added by default to the **Manage access** field (see an example from a task with restricted access in the screenshot below) and can't be removed. If a Client User wants to remove Client-side users' access, they should make changes in Assignees fields beforehand.



You can also manage access to multiple tasks on a Portal level (see below).

7.4.4 Download task reports

There are various reports you can download on a task level.

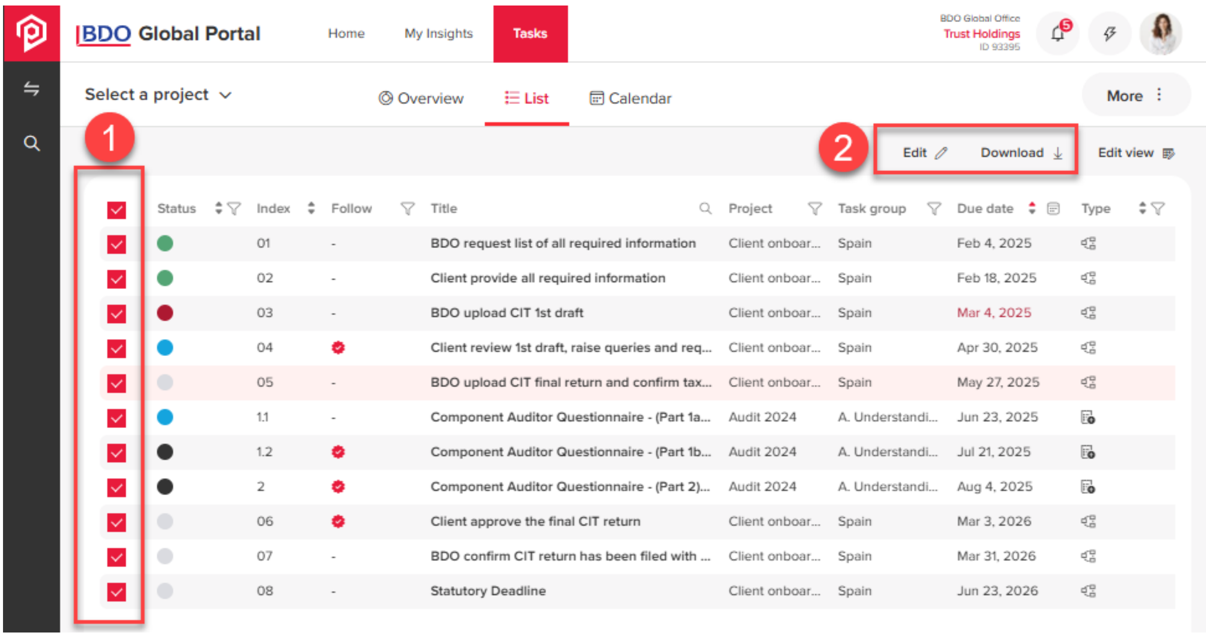


Click the gear icon in a task to download a *Task status change report* and a *Task comments report*. For Signing and Approval tasks there is an additional option *Signing/Approval logs*. In Survey tasks you can download the task in Excel and PDF format.

The **Task status change report** allows to track what and when happened with the task and who and when changed the task status. The **Task comments report** allows you to export comments on a task level.

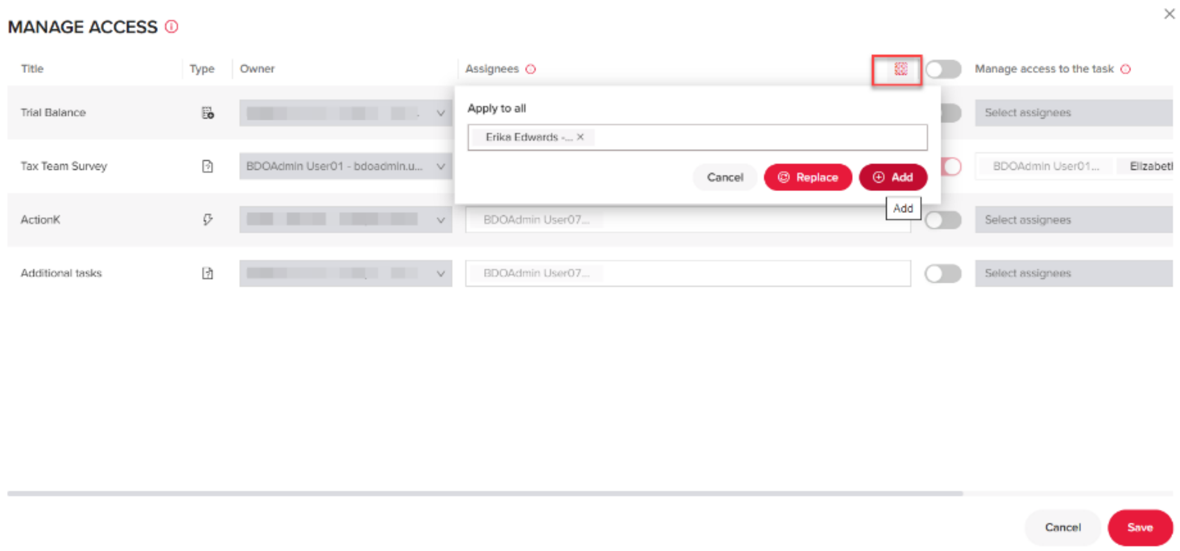
7.4.5 Edit multiple tasks or download tasks' files and reports

In **List** view, you can edit multiple tasks within one portal by simply selecting them. Once you have selected some tasks, the **Edit** and **Download** buttons will be enabled

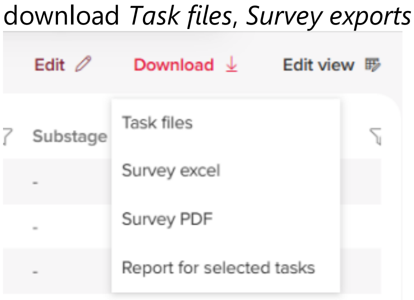


If you have *Client admin* permissions, under the **Edit** button you will see the **Manage access** option. Follow the instructions on the screen to add other members of your team to tasks as needed.

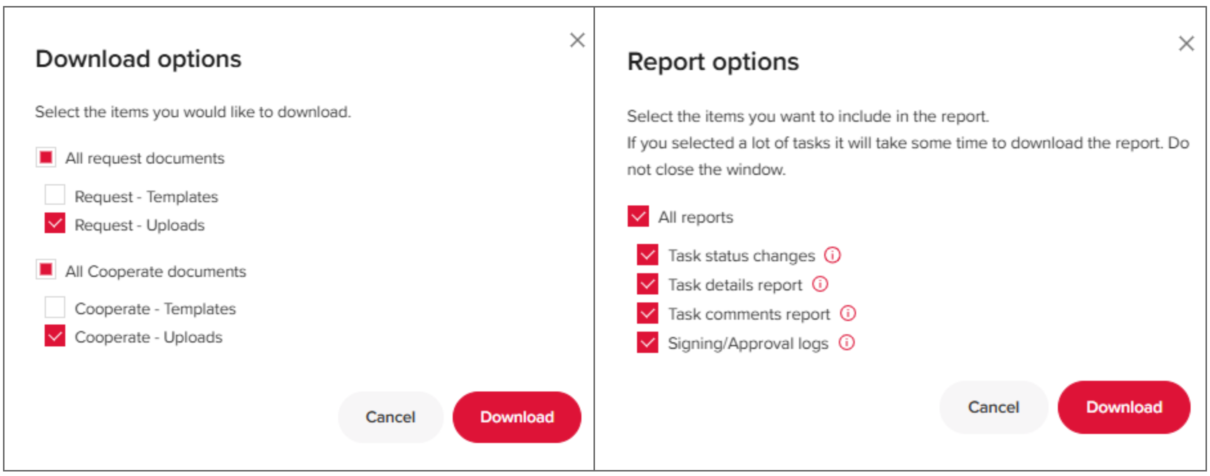
In the appearing **Manage access** dialog you can apply new assignees in bulk. In the **Assignees** column click on the red square icon **Apply to all** and verify only users, who have access to all Portal projects, are shown in the drop-down list. Choose any client-side users from the list and click the **Add** button. Click **Replace** if you'd like to override the previously assigned users.



The **Download** button that becomes active upon tasks selection, will provide you with options to download *Task files*, *Survey exports (Excel and PDF)* or available *Reports* for your tasks.



The **Task files** and **Report for selected tasks** options will display additional prompts to specify the content to be downloaded:

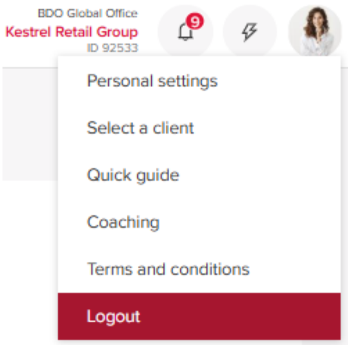


Apply your selections and a zipped file will start downloading. Please note that Survey tasks are not exported in zip files. To export survey results, select the corresponding options **Survey excel** or **Survey PDF**.

8. PERSONAL SETTINGS

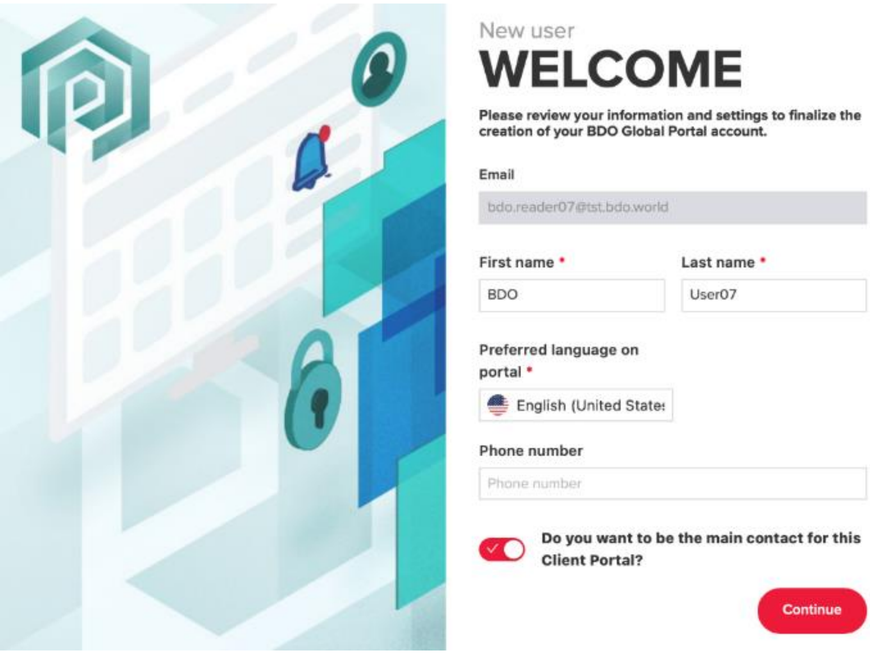
When logging in to Global Portal for the first time you will be prompted to set your personal preferences.

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.

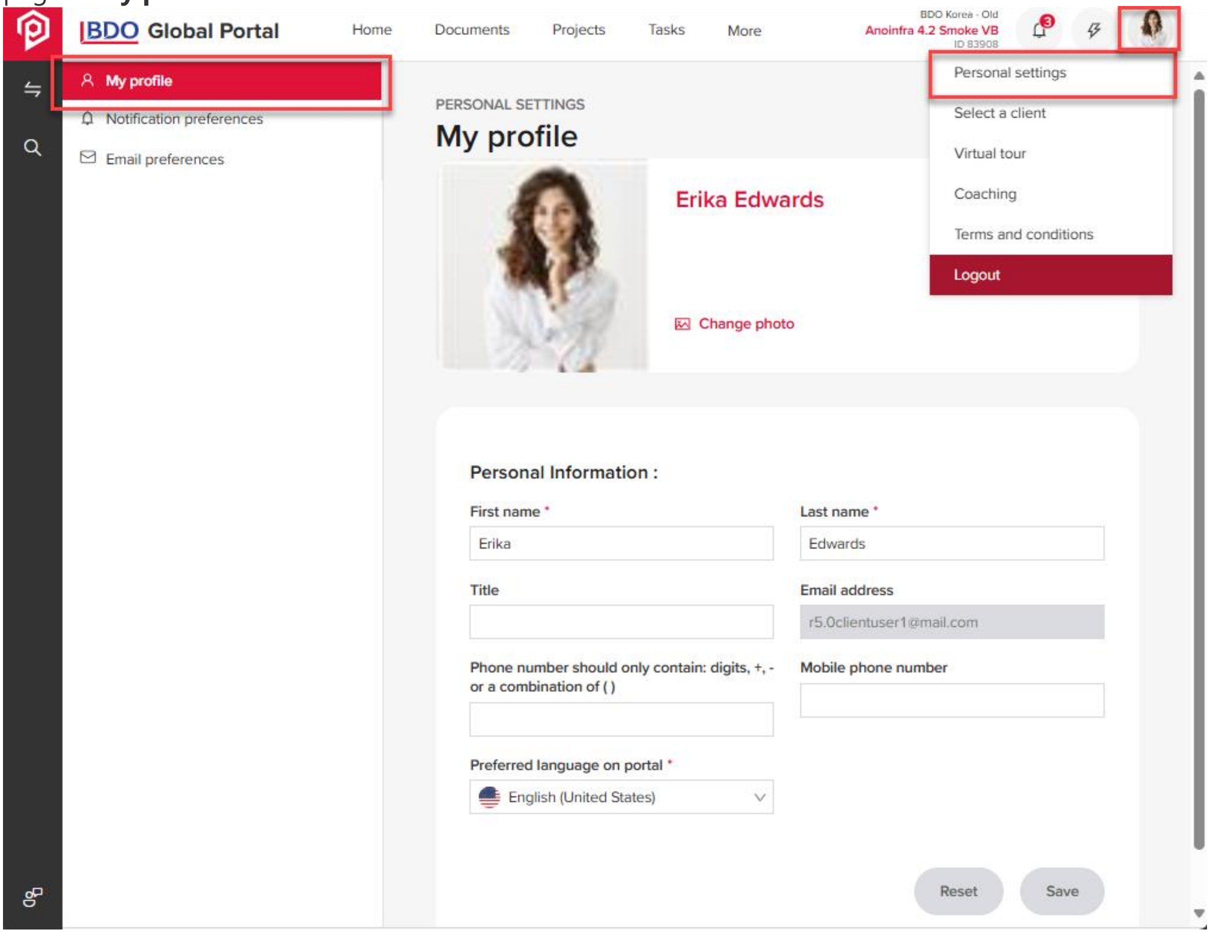


8.1 Step 1 – Set my contacts

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



If you want to change your language settings, photo or contact details, go to the **Personal settings** page > **My profile**

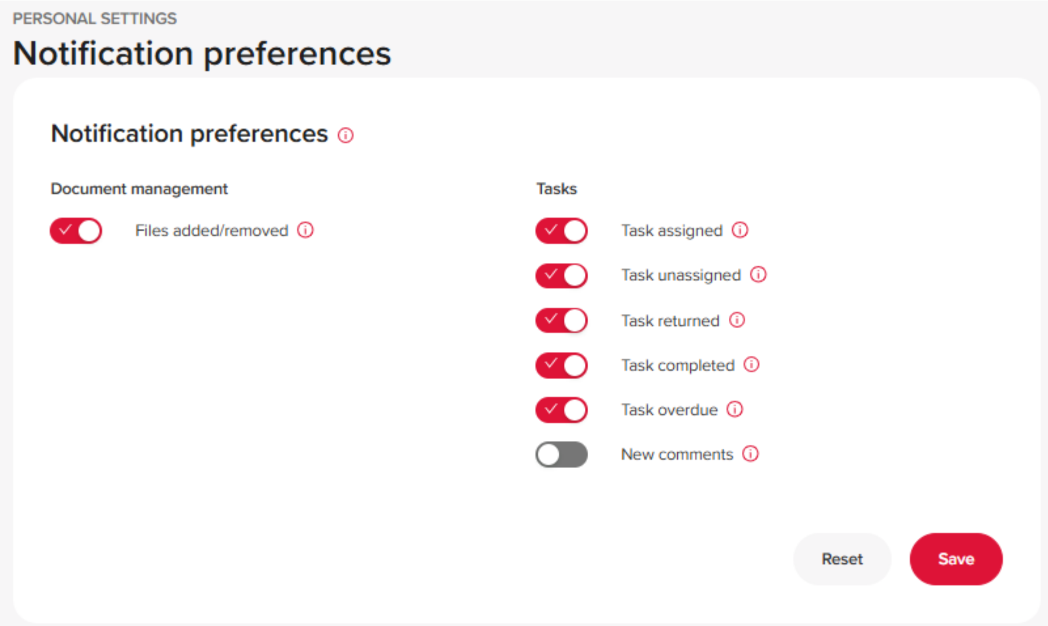


8.2 Step 2 – Set my Insight preferences

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

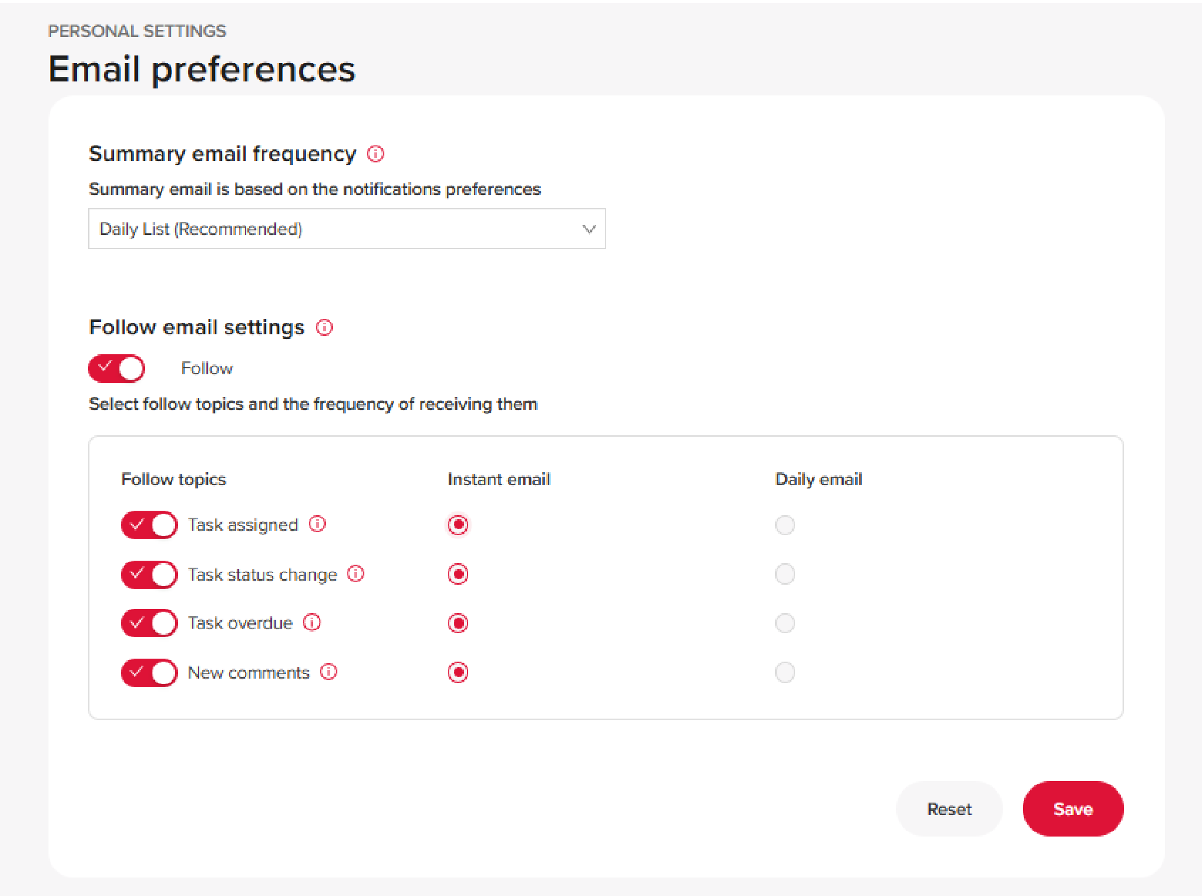
The **Insights preferences** step is not mandatory and you can skip it by clicking the **Skip** button on the bottom right corner.

8.3 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.

8.4 Step 4 – Set my Email preferences



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

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

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

9. TEAM MANAGEMENT FOR CLIENT ADMINISTRATORS

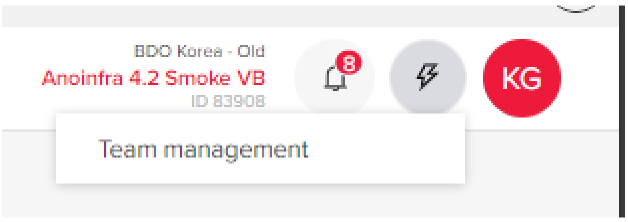
The roles Client users can have in Global Portal and their permissions are as follows:

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

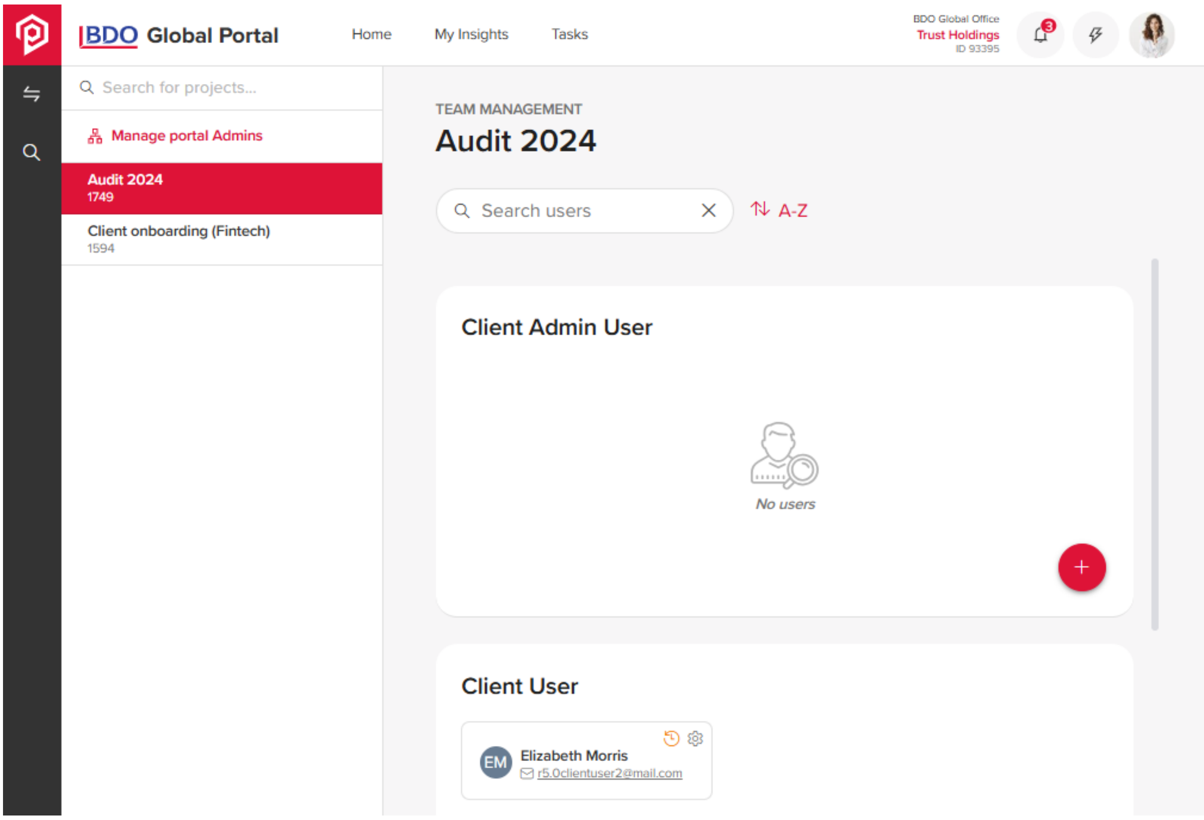
Please note that the **Client CP Admin** role has access to all projects under a portal. Portal Admins cannot upload deliverables or complete tasks, unless they are assignees, but they can view tasks and files in Tasks and edit files in the Documents library.

9.1 Team management page

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



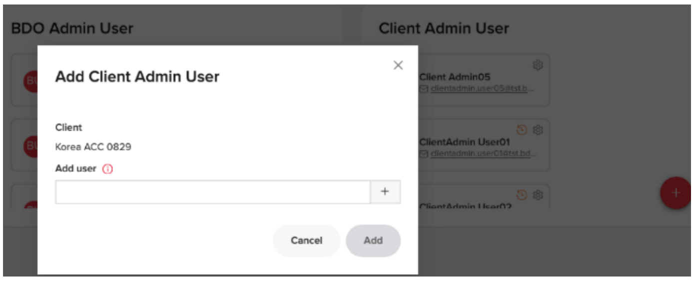
If you act as a Client CP Admin or Client Project Admin on a portal or project level respectively, you can add/remove users to/from all the groups you see in Team management.



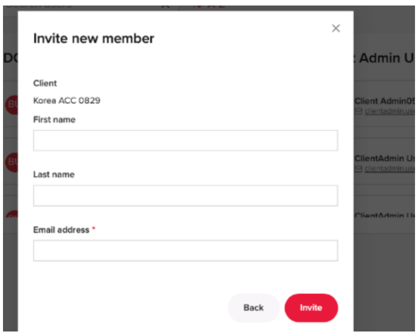
9.2 Add users to a project

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

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

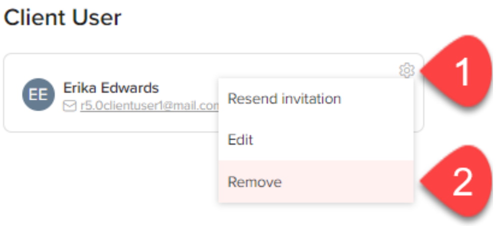


- If you wish to add a new user, click the plus button and provide their names and email address and click **Invite**.



9.3 Remove users

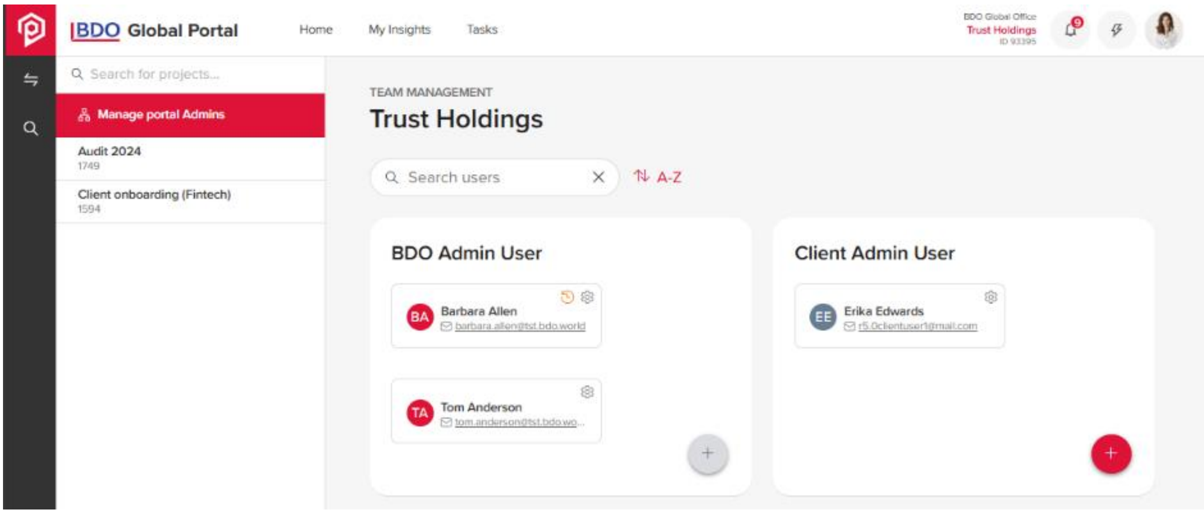
To remove a user from a group, click the gear icon next to the user's email and select **Remove**.



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.

9.4 Portal team management



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

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

10. NEED FURTHER ASSISTANCE?

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

www.bdo.global