

Hi, Welcome [Username]
To your **BDO Global Portal**

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

Task status



Owned/assigned tasks

Status	Portal	Project	Task
●	Client Name	Project Name	Task title
●	Client	Project	Task title
●	Client Name	ProjName	Task title
●	Name du Client	Project Name	Task title
●	Portal Name	ProjectName	Task title
●	Portal Name	ProjectName	Task title

Pinned Portal progress

Portal	Memberfirm	Pinned Portal progress
Pinned client	BDO Netherlands	15
Pinned client	BDO Netherlands	5
Favourite client	BDO Netherlands	11
Pinned client	BDO Belgium	8
Favourite client	BDO Netherlands	7

GLOBAL PORTAL

Tasks – Exchange Next Gen

9 February 2024



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DOCUMENT DETAILS

VERSION MANAGEMENT

Version	Date	Author	Nature of amendment
1.0	November 2022	Karolina Mala	Updated document based on 5.0 and 4.6 User guide, 5.1 RN
1.1	October 2023	Raminta Pociute	Updated document based on 5.1 and 5.2 User guide, 5.3 RN
1.2	January 2024	Raminta Pociute	Updated document based on 5.2 and 5.3 User guide, 5.4 RN
1.4.	February 2024	Justin Kallickal, Maria Peicheva	Added instructions and screenshots for signing and approval tasks, proofreading and formatting

REVIEWER

Name	Version	Date
Karolina Mala	5.1	8 November 2022
Raminta Pociute	5.3	3 October 2023
Raminta Pociute	5.4	January 2023

INTENDED AUDIENCE

Target Audience
BDO Clients

1 INTRODUCTION

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

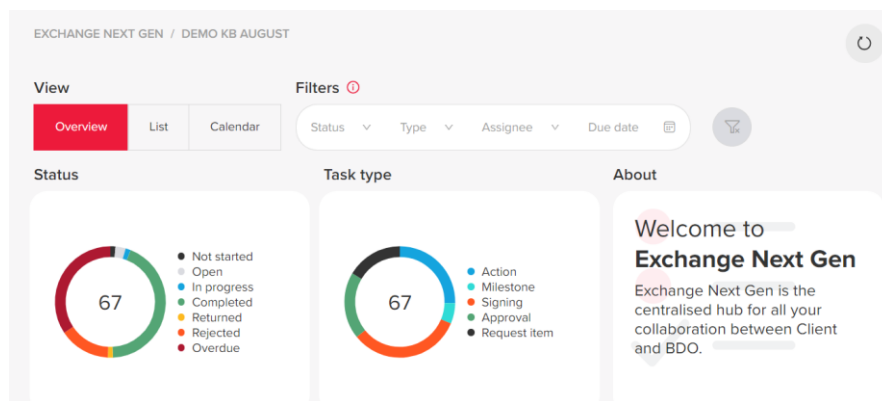
You can view dashboards to see which tasks are overdue or outstanding. Each project has a view allowing you to monitor tasks and document requests by type, including filters by due date or assigned to.

Click the task you wish to complete and then to upload files, simply use drag and drop or the upload button.

2 DASHBOARDS

2.1 Portal dashboard

Dashboards represents the statistics of all tasks count in the Portal, where you have access to.



2.1.1 Status dashboard

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.

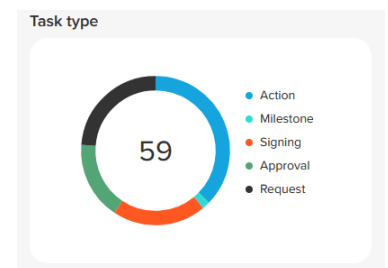


2.1.2 Task type dashboard

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

1. List of types with the final order and colours:
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.



2.1.3 List view

The List view displays Tasks table providing the filters to the Tasks.

Status	Index	Title	Due date	Project	Task gr...	Type	Actions	Entity	Period ...	Other	Location	Assigned to
●	9	task9	Dec 19, 2023	basic	task9	👁	- - -	task9	Dec 17, 2021	task9	task9	-
●	9	RI with template	Dec 19, 2023	sgdre fsgr...	task9	👁	- - -	task9	Dec 17, 2021	task9	task9	-
●	9	task9	Dec 19, 2023	basic	task9	👁	- - -	task9	Dec 17, 2021	task9	task9	🚩
●	9	task9	Dec 19, 2023	sgdre fsgr...	task9	👁	- - -	task9	Dec 17, 2021	task9	task9	-
●	9	task9	Dec 19, 2023	basic	task9	👁	- - -	task9	Dec 17, 2021	task9	task9	-
●	9	task9	Dec 19, 2023	sgdre fsgr...	task9	👁	- - -	task9	Dec 17, 2021	task9	task9	-
●	9	RI with template	Dec 19, 2023	basic	task9	👁	- - -	task9	Dec 17, 2021	task9	task9	-
●	9	RI with template	Dec 19, 2023	basic copy	task9	👁	- - -	task9	Dec 17, 2021	task9	task9	-
●	9	RI with template	Dec 19, 2023	sgdre fsgr...	task9	👁	- - -	task9	Dec 17, 2021	task9	task9	-

The "Tasks" table for Portal level is the same as for Project level with one additional column - "Project" added. The columns within the table are:

- Status – status of the task displayed as a bubble with status colour and status name
- Index
- Title – title of the task
- Due date – due date or extended due date (if the is one) value
- Project – project name to which task is assigned to
- Task group – task group to which task belongs to (if task does not belong to a task group, "-" symbol is displayed)
- Task type (Request; Action; Approval; Signing; Milestone)
- Actions 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.

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

On Portal level list view, the tasks can be filtered by Master filters & Table filters.

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

2.1.4 Calendar view

After choosing Calendar View a default monthly view appears and It is possible to switch from monthly to annual view by using radio button on the top left corner.

EXCHANGE NEXT GEN

5.4 new years portal rp

View: Overview | List | **Calendar** | Filters

Status | Type | Assignee | Due date | Follow

January / 2024

Su	Mo	Tu	We	Th	Fr	Sa
31	01	02	03	04	05	06
07	08 ● sign ● approve ● signone	09 ● approve	10	11 ● df ● Team Survey ● Sign task wi	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31	01	02	03
04	05	06	07	08	09	10

BDO Global Portal | Holmes | My Insights | Documents | Projects | **Exchange Next Gen** | Custom Menu 1 | More

BDO Merritus & Co. PortalOctober3 ID 187955

EXCHANGE NEXT GEN

PortalOctober3

View: Overview | List | **Calendar** | Filters

Status | Type | Assignee | Due date

October / 2023

Su	Mo	Tu	We	Th	Fr	Sa
01	02	03	04	05	06	07
08	09	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31	01	02	03	04

View: Overview | List | **Calendar** | Filters

Status | Type | Assignee | Due date

July / 2022

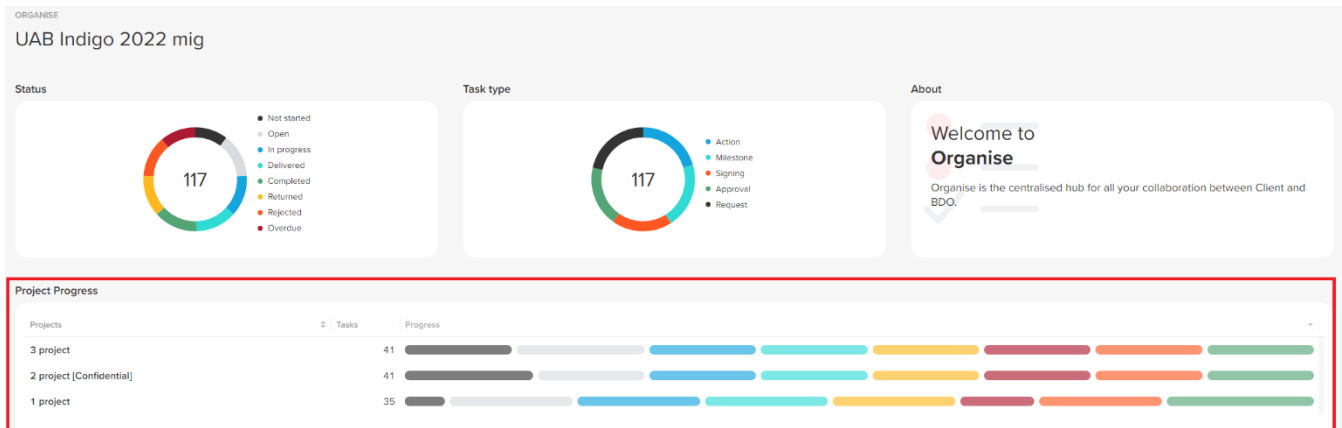
Su	Mo	Tu	We	Th	Fr	Sa
26 ● task	27 ● approval task - today	28	29 ● Signing task to become restricted	30 ● Signing for Example	01	02
03	04	05	06 ● Approval task ● Approval task - test	07 ● Test ● Request	08 ● Not started signing task ● Test	09
10 ● Test	11 ● Test ● Test task for ... ● OOI ● OOI sign ● Approval task	12 ● Task for Location ● Owner Assignee ● Owner Assignee	13	14	15	16
17 ● Not started task	18	19	20	21	22	23
24	25	26	27 ● Request in progress ● Request to be delivered (delivered)	28	29 ● Request task ● Approval OOI ● Make contract task ?	30

It is important to notice that the Calendar view depends on the Master date filter, i.e. if the filtered period is within a single month, the month is shown. If the filtered period is between a few months in the same year, the year is shown, which includes the filtered period. If the filtered period includes 2 or more years, the first year of the period is shown.

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

2.1.5 Pills dashboard

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



In **Projects column** you will see all Projects to which you are added to and will be listed out under "Client portal tasks". If project do not have tasks – this project will not be seen in "Projects" list.

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

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

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

2.2 Project dashboard

Compared to the Portal level, the functionality of the Status and Task type dashboards on the Project level do not change.

2.2.1 Status dashboard

Please see the Portal dashboard section above.

2.2.2 Task type dashboard

Please see the Portal dashboard section above.

2.2.3 Assigned to dashboard

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 colours (as in Status) are used and repeats (with some opacity) if more than 8 assignees a scrollbar becomes visible.
3. Interaction with "Status"/"Task type" is the same in reversed order

2.2.4 List view

The Task table on Project level behaves the same way as on the Portal level. Please see the Portal List view section above.

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:

- 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

2.2.5 Calendar view

The Calendar view on Project level behaves the same way as on the Portal level. Please see the Portal Calendar view section above.

2.2.6 Pills dashboard

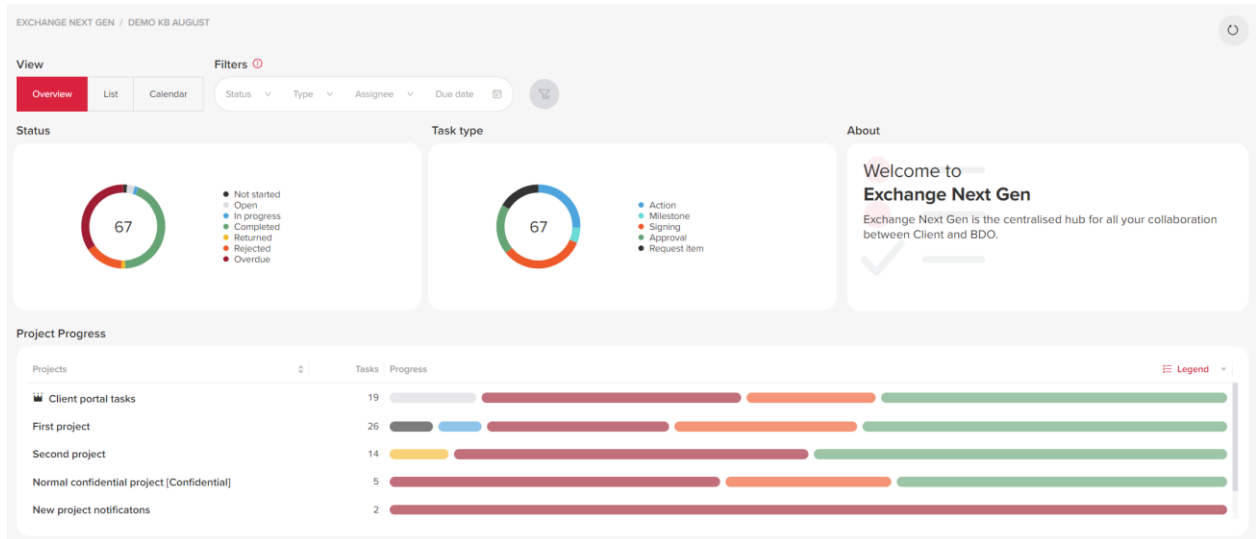
The Pills dashboard works in the same manner as dashboard "Status"/"Task type". *Please see the Portal Pills dashboard section above.*

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.

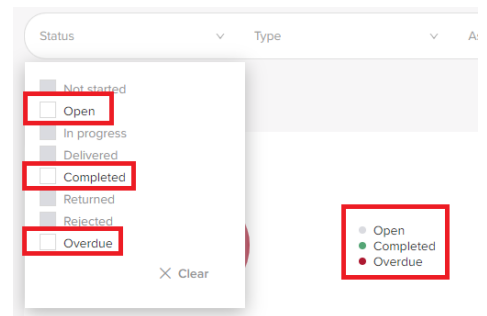


These filters will be used with user's selection while changing view between "Overview", "List" and "Calendar". After each selection the page updates all dashboards, because filters are directly connected to Doughnuts "Status", "Type" and "Assigned to" ("Assigned to" doughnut is on project level only).

2.3.1 Filter "Status"

You can select a status by clicking on filters area and choose needed status by clicking on it. Available statuses are changing dynamically, and multiple selection is available.

"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"

The "Type" filter behaves the same as the "Status" filter.

2.3.3 Filter "Assignee"

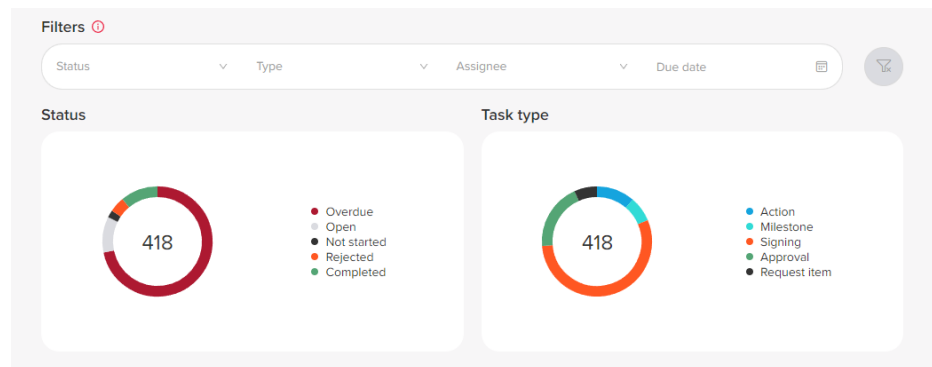
The "Assignee" filter behaves the same as the "Status" and "Type" filter. Only available assignees are displayed and the multiple selection is available on the Project level only. Additional option of search is available on top, search starts with start of typing. Selected assignees are not affected while searching.

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 button.

- Status
- Type
- Assignee
- Due Date



filter

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).

2.3.5 Due date filter

The "Due date" filter is added to "Filters" on Portal and Project level Overview pages. The 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".

Clicking on filters area - filters options opens/hides:

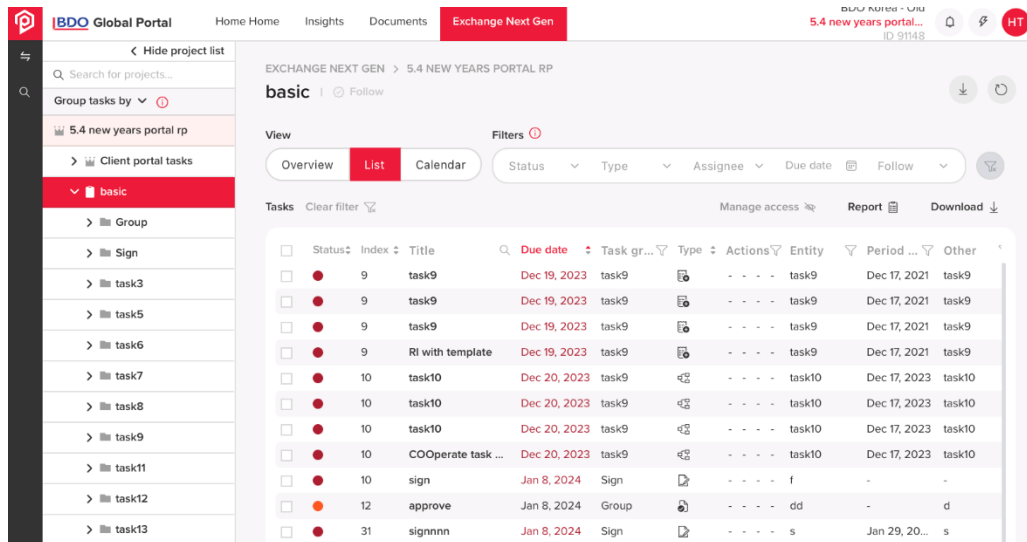
- The calendar is shown - standard "datePicker"
- User always is selecting both start and end dates
- Two months are showed
- Options to move month and year to the future and past is available

After each selection the page updates all dashboards. This filter is not interactive and is not showing possible dates to select. Additional pre-set ranges are available as "Today", "This Month" and "No due date".

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.



You can filter tasks by using either:

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

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)

2.3.7 Clear master filters

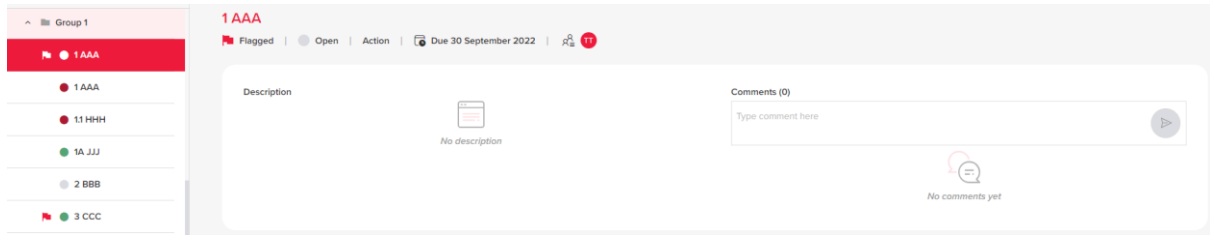
Button "Clear Master filters" is added next to Master filters in Project and Portal level dashboards and in all views – Overview, Calendar, and List. Button "Reload data" is added in Portal and Project level dashboards and in all the views.

3 TASKS

There are the following types of Tasks:

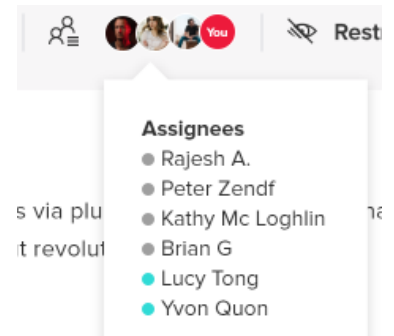
- Request Items
- Actions/Milestones
- Survey
- Cooperate
- Signing
- Approval

The Tasks are sorted by index in ascending order when Group by Projects (default) is selected. Tasks with indexes are displayed on top of the list and Tasks without index are displayed below the indexed tasks.



It is possible to see which user already completed or rejected the task. However, it's difficult to understand what other users have done so far. Assigned users will have circle icons indicating what they have done with the task. An example of colour coding used to describe the progress of the users:

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



3.1 Request Item

The Request Item status is indicated by the status name and a coloured bubble next to it. Hovering over these statuses an explanation text is displayed:

TASK STATUS NAME	EXPLANATION
Not Started ●	<i>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.</i>
Open ●	<i>The task is ready to begin. If Request Item task is created without a start date, or start date is today or earlier than today, Request Item task status is Open.</i>
In progress ●	<i>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.</i>
Delivered ●	<i>A Request Task has been sent to BDO for review. After Client user or BDO User, assigned to the Request Item 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 become read-only in Exchange Next Gen 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.</i>
Completed ●	<i>Task was completed and does not require any additional actions. All files in Uploads becomes read-only in Exchange Next Gen and in Documents page. BDO user sees Return and Export buttons at the end of Task Overview page. The Request Item task cannot be edited when task is status Completed.</i>
Returned ●	<i>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 Request Item, he can return it by clicking on the "Return" button. Request Item 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. Client user or BDO user, who is assigned to the task, sees active "Deliver request" button.</i>
Overdue ●	<i>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.</i>

3.2 Actions/Milestone

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

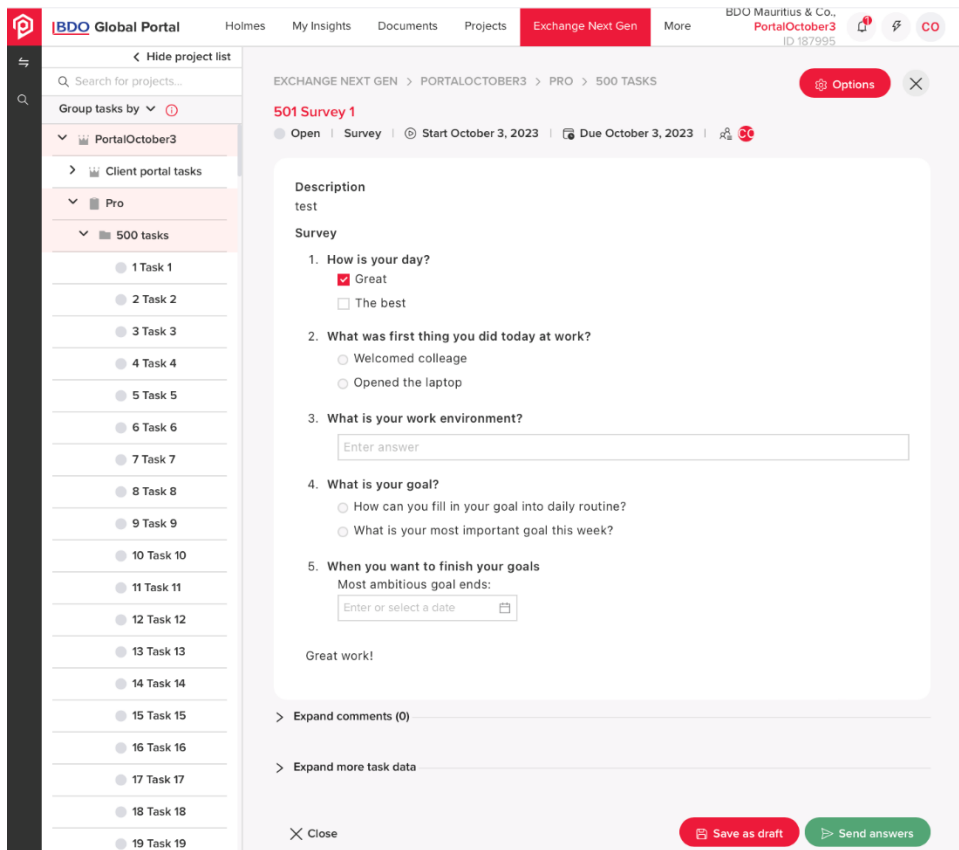
- Status
- Task type
- Due date
- Assignees (no Assignees for Milestone)

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

TASK STATUS NAME	TASK DESCRIPTION	
Not Started	<i>Tasks start date is in the future, the task is not ready to begin</i>	● Not started
Open	<i>The task is ready to begin.</i>	● Open
In progress	<i>When 1 or more file or comment is added (Request Task) OR when, not all assignees have completed their actions (Signing, Approval, Action Tasks)</i>	● In progress
Completed	<i>Task was completed and does not require any additional actions.</i>	● Completed
Rejected	<i>When any of assignees rejected the task (Signing, Approval, Action Tasks)</i>	● Rejected
Overdue	<i>When a task is not completed, and the due date is in the past.</i>	● Overdue

3.3 Survey

All Client users who have access to the project and assigned BDO users (except client and BDO readers) can fill the Survey, save their answers as draft, and send answers. Survey task created by BDO user/admin with all types of questions can be found in Exchange Next Gen. Client can open its overview page and answer few questions, button Save as draft (if client user wasn't the assignee, he/she is added to the assignees list after he/she clicked the button).



Client users (except readers) can make actions that change the status of Survey task: When Client add the comment to Survey task that is in Not started or Open status then status is changed to In progress.

As client user answer all mandatory questions of the Survey (in any status, except completed) and clicks the button Send answers, then the status is changed to Delivered and user is added to assignees list.

Client users (except readers) can flag and unflag Survey tasks.

Client user/admin in Exchange Next Gen via button Manage access can remove or add Client users.

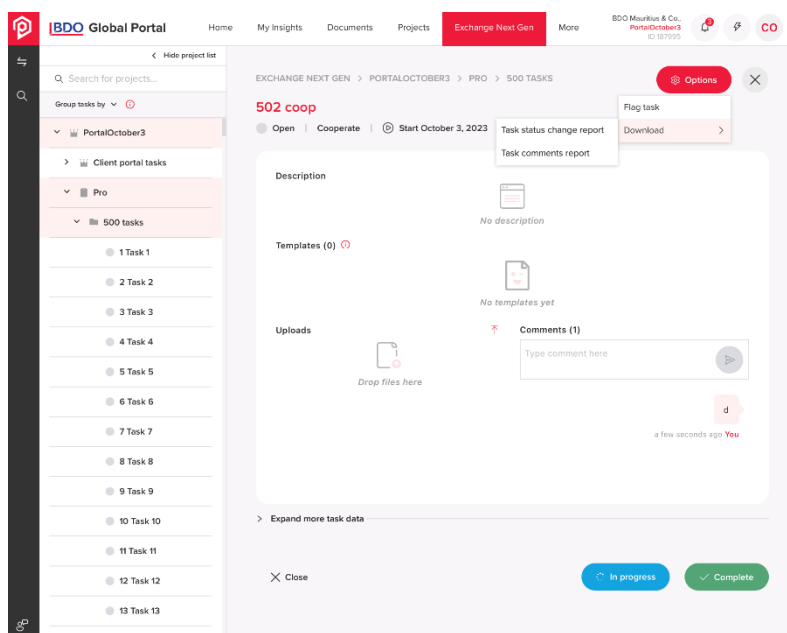
General logic applicable to both BDO and Client users:

Column1	To Not started	To Open	To In progress	To Delivered	To Overdue	To Completed	To Returned
From Not started		Start date passed	Client side user or assigned BDO user answer at least one question and click the button 'Save as draft' OR Client side user or BDO user adds the comment to the task	Client side user or assigned BDO user answers all mandatory questions and clicks the button 'Send answers' OR if there are no mandatory questions, user answers at least one question		BDO user/admin click the button 'Complete'	BDO user/admin clicks the button 'Return'
From Open	Start date is edited to future		Client side user or assigned BDO user answer at least one question and click the button 'Save as draft' OR Client side user or BDO user adds the comment to the task	Client side user or assigned BDO user answers all mandatory questions and clicks the button 'Send answers' OR if there are no mandatory questions, user answers at least one question	Due date passed	BDO user/admin click the button 'Complete'	BDO user/admin clicks the button 'Return'
From In progress				Client side user or assigned BDO user answers all mandatory questions and clicks the button 'Send answers' OR if there are no mandatory questions, user answers at least one question	Due date passed	BDO user/admin click the button 'Complete'	BDO user/admin clicks the button 'Return'
From Delivered			Client side user or assigned BDO user answer at least one question and click the button 'Save as draft' OR Client side user or BDO user adds the comment to the task			BDO user/admin click the button 'Complete'	BDO user/admin clicks the button 'Return'
From Overdue	No actions were made since the task was created and Start date is edited to future	No actions were made since the task was created and Due date is edited to future	Due date is edited to future if before due date passed, the task was in progress	Client side user or assigned BDO user changed the answers and clicked the button 'Send answers' again		BDO user/admin click the button 'Complete'	BDO user/admin clicks the button 'Return'
From Completed			BDO admin/user clicked 'Change status' and selected 'In progress'				BDO user/admin clicked 'Change status' and selected 'Return'
From Returned			BDO admin/user clicked 'Change status' and selected 'In progress' or Client side user changed the answers and clicked the button 'Save as draft'	Client side user or assigned BDO user answer all mandatory questions or changed the answers and clicked the button 'Send answers'	Due date passed	BDO user/admin clicked 'Change status' and selected 'Complete'	

3.4 Cooperate task

The Cooperate task has fewer statuses than Request Item task - Open, In progress, Completed (and Overdue, depending on Due date set). Statuses can be changed by BDO Admin & task assignees. Depending on the status, task assignees can do different actions with the task: if task is Open or In progress, they can download templates & uploads, upload uploads, write & view comments, change task status (to In Progress or Completed); if task is Completed, they can only view comments & download files.

Users can keep track of the status changes that are made to the Cooperate task as well as to get detailed current information about multiple Cooperate tasks via Task Details report:



Task owners, assignees or project users are notified if different actions are performed to Cooperate task so they can plan next steps for the task accordingly.

4 TASK ACTIONS

4.1 Provide an attachment to the Request Item

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

1. only one level folders can be added;
2. if 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."
3. files cannot be added to the already uploaded folder;
4. folders and files are displayed in a file tree.
5. File types depends on each Tenant setting.
6. File size restriction applies the same as files in Documents (2GB).
7. If more than 8 files are uploaded scroll appears.
8. All files can be downloaded at once on Download **all** button. Files are zipped.

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.

4.2 Download responses to the Request Item

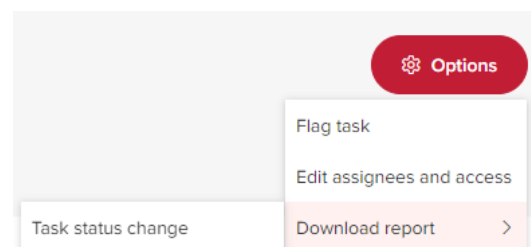
You can download files from ONE project's Request task. Only Request task documents could be downloaded. Download button is displayed at the right top of list view and active if Project does have at least one Request task, otherwise the button is greyed out and inactive.

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

4.3 Actions

You can perform the following actions with all tasks:

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



4.4 Flag a task

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

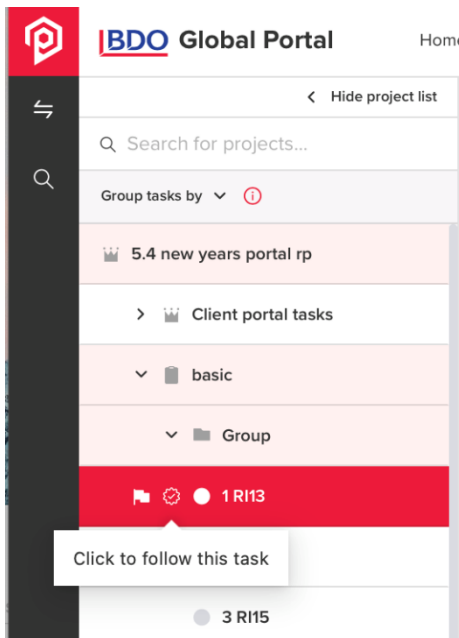
Group Tasks by flag:

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

4.5 Follow a task

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

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

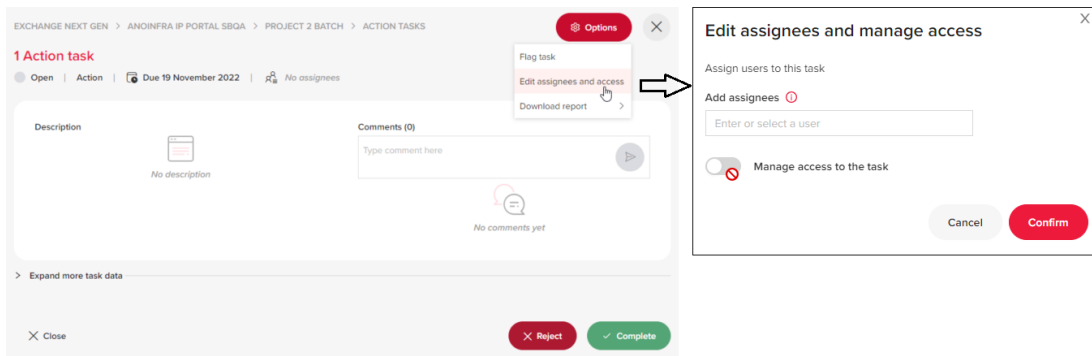


4.6 Edit assignees and access

You can edit Client assignees and manage access for Request Item and Action tasks, that are not in Completed or Rejected status. Client users editing assignees and managing access to the task are:

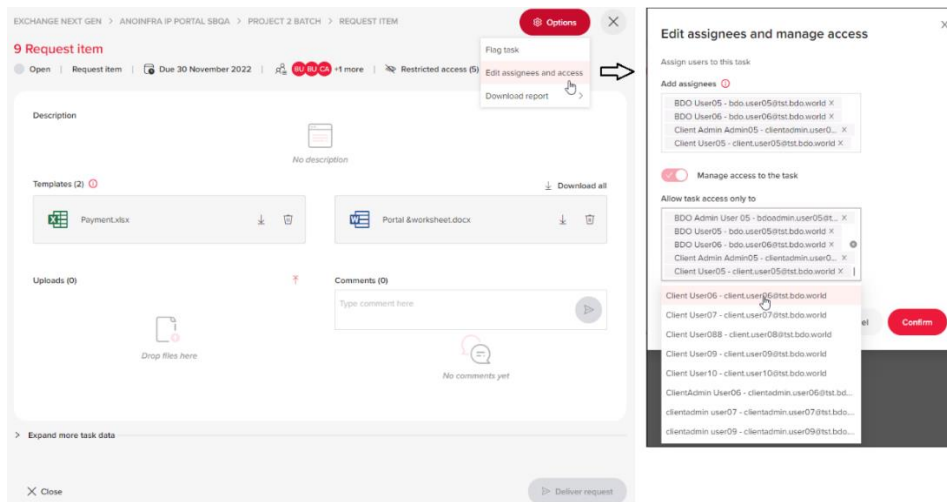
- Client Portal Admin
- Client Project Admin
- Client Project User

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



You can add/delete yourself and only Client-side users to the Assignees as well as edit only Client-side assignees and manage access for restricted Action and Request item task that are not in Completed or Rejected status.

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



4.7 Download Task status change report

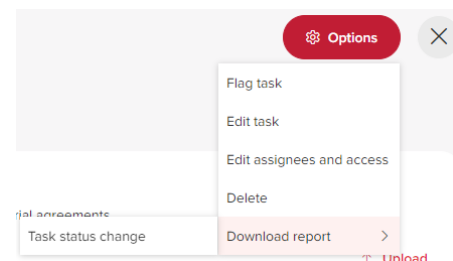
Task status change report allows to track what and when happened with the task and who and when changed the task status.

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.

4.8 Download survey results

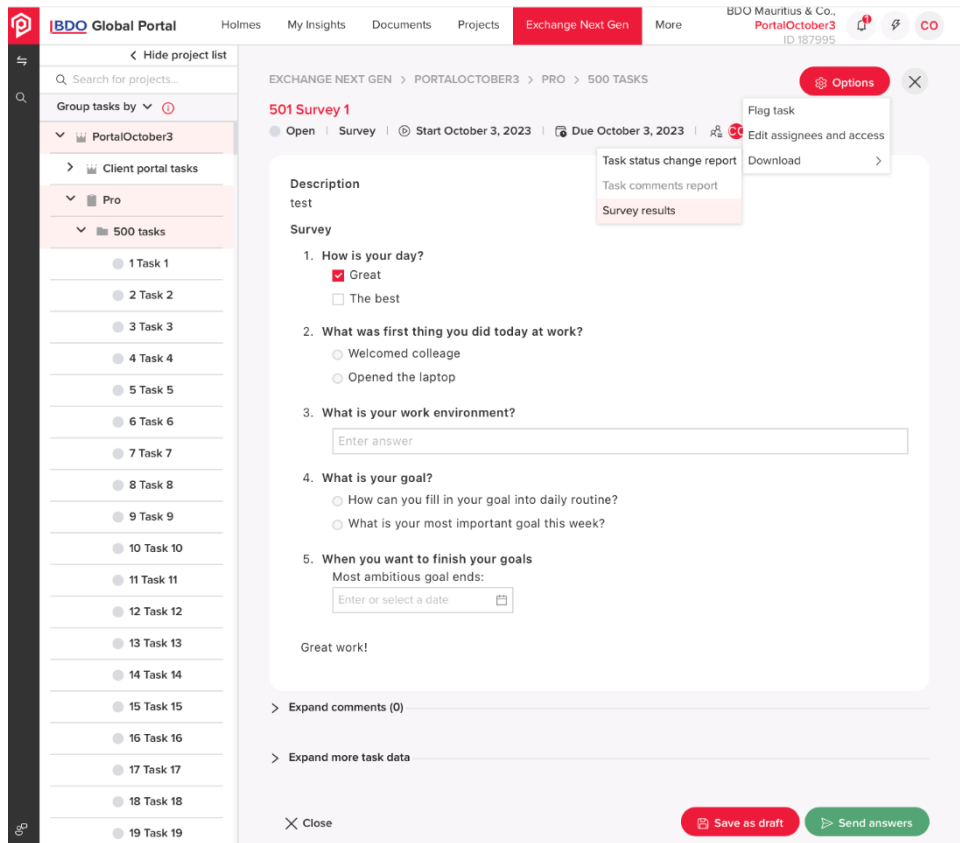
All users can download Excel file with Single Survey results and analyse the results. Results file content reflects the same information as it is in UI (Portal, project, status, subtype, index, title, task owner, group, description, assignees, manage access, start date, due date, extended due date, location,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



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

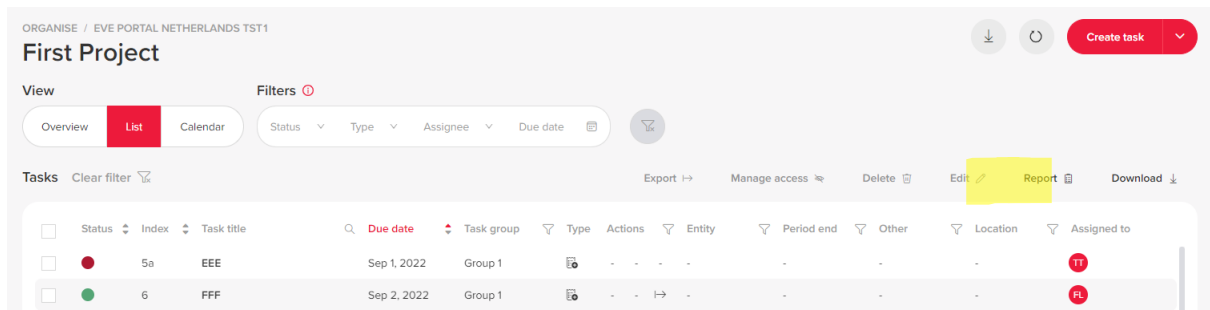
- All questions have number, section breaks don't. If more than 1 answer for multiple choice or date question are selected or if the answer with explanation is selected, answers are separated by "|".

- The structure of file name is "Survey task_[Task title]_[date and time when it was generated]". Date format depends on MF language settings.



4.9 Export Task status on Project level

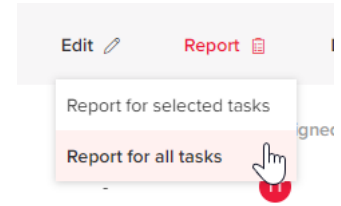
Any user that has access to the Task can download Task Status Change Report. Click on the 'Report' button in a Project level in List view.



Two options displayed:

- Reports for selected tasks
- Report for all tasks

The report is generated in excel with all selected tasks on the same sheet. The report shows how status changed for certain tasks starting with task creation till report generation date. For each status change there is a separate entry with task information at that point of time.

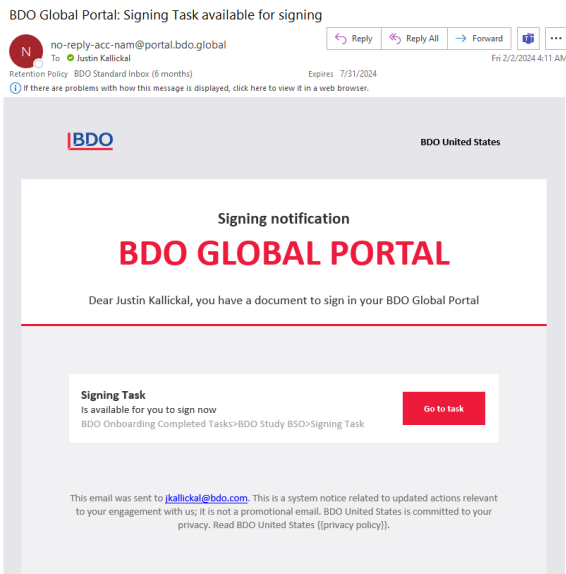


5 DOCUMENTS ACTIONS

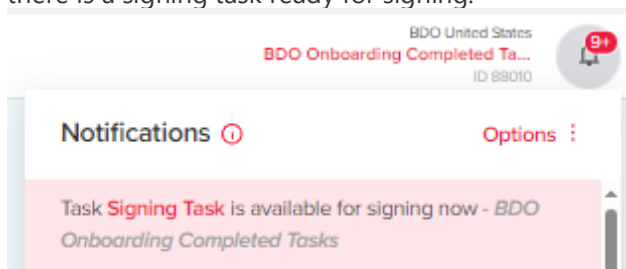
5.1 Signing and Approval tasks

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

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



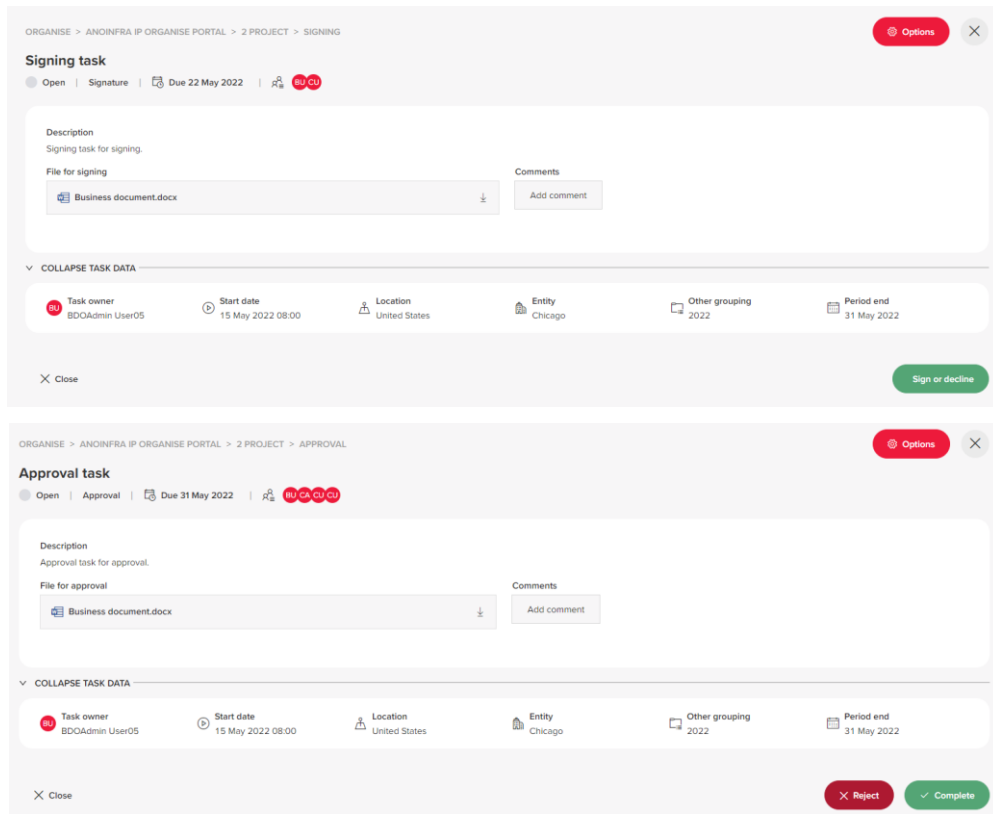
In addition to the email notification, you will also get a bell icon notification on Global Portal indicating that there is a signing task ready for signing.



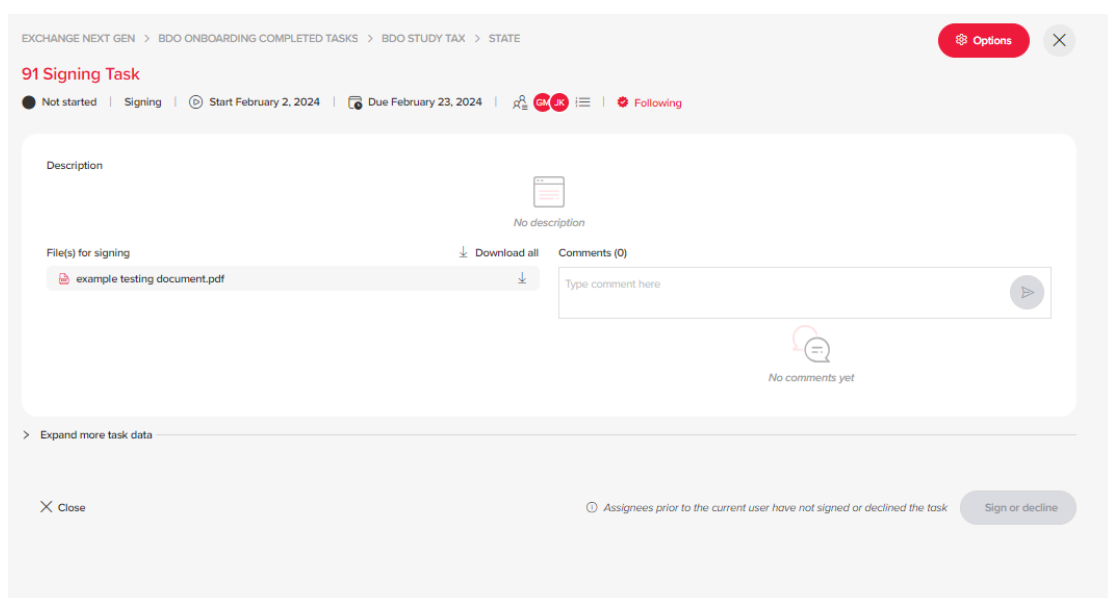
When you go to the task, you will see the task overview page that gives you additional information on the signing task. You can hover over the people icon to see the ordered list. The Green Icon next to the name

indicates, that assignees already signed the documents. You have the option to download the PDF file so you can review the document before signing the document in DocuSign.

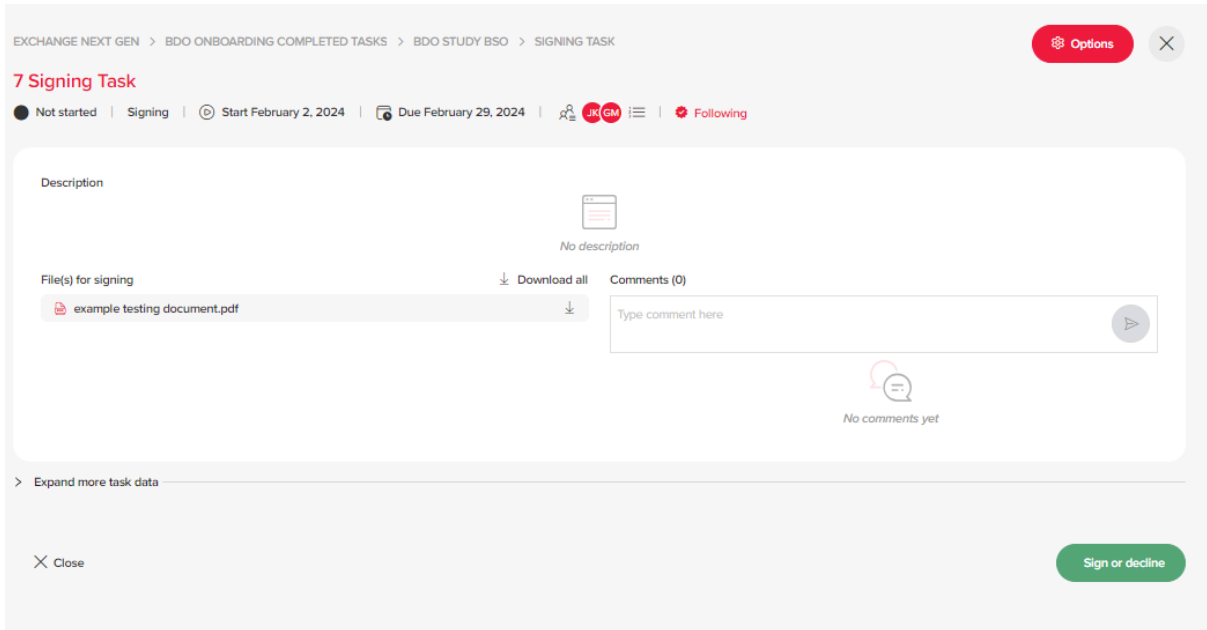
To provide a signature or approval go to Exchange Next Gen, choose the project and open the Signing/Approval task you are assigned to. Review the documents and press the **Sign or Decline** button in a Signing task or the **Reject** and **Complete** buttons in an Approval task.



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



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



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

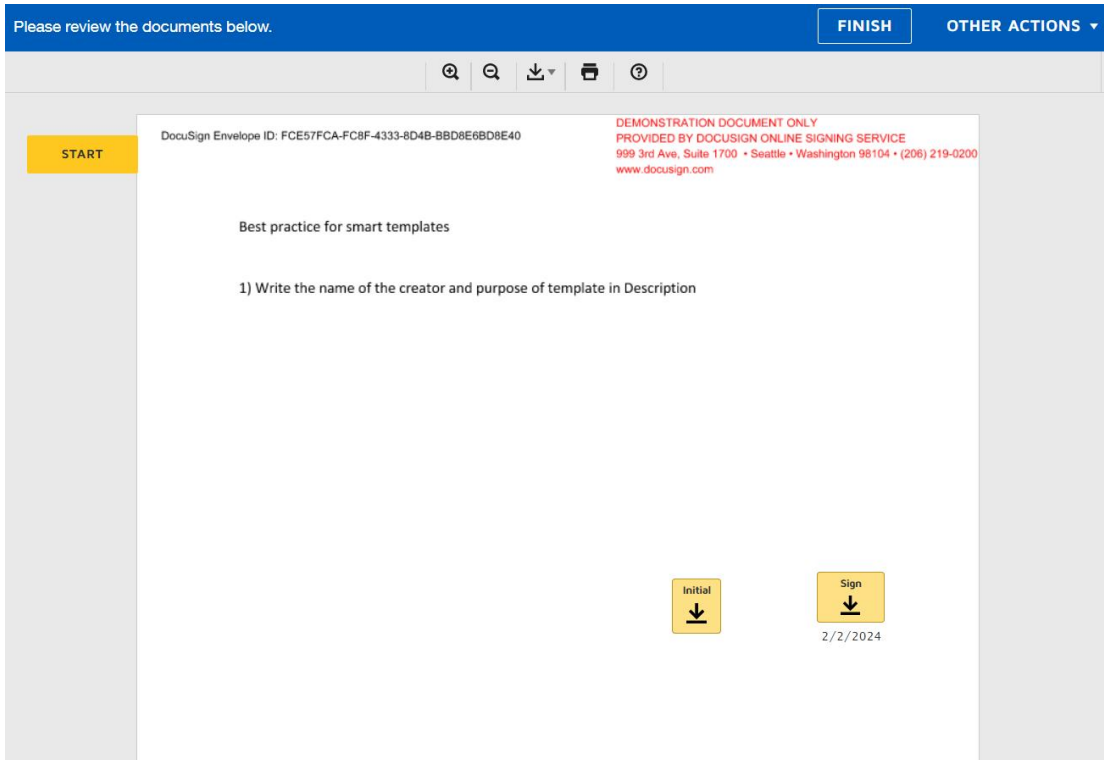
Redirection to DocuSign

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

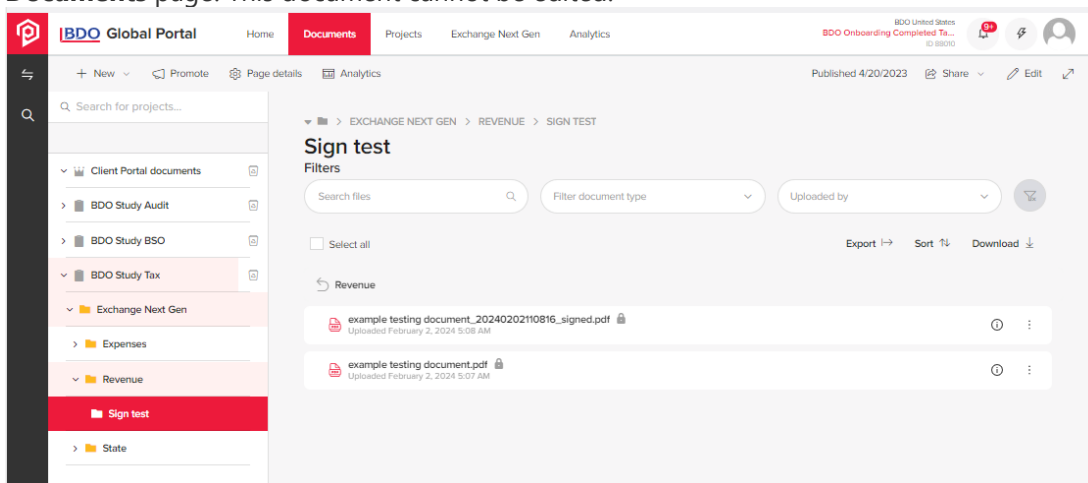
Cancel

Continue

Once you are in the DocuSign platform, you will 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.



5.2 Read only/editable Request Item documents

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

TASK STATUS NAME	DOCUMENT ACTION
<i>In progress</i>	<i>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.</i>

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

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

All files in the Exchange Next Gen folder become read-only when task gets status Delivered or Completed and work the same way as with other read-only files in Documents. File has a "lock icon" next to the title to identify its read-only. Read only is depending on status in Exchange Next Gen task (when it is Complete or Delivered). You will not be able to create task for any of the file that is in Exchange Next Gen folder. For all other statuses files would be editable.

5.3 Storing Request Item files to Documents

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

You can't add additional file or folder from Documents UI to any of the Exchange Next Gen folders. Folder names cannot be edited from Documents page UI. Exchange Next Gen structure folders (Exchange Next Gen, 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 Next Gen, then it is updated in Documents as well.