

BDO PORTAL [CLIENT]

Functional overview

22 November 2022

CONTENTS

1. Welcome page	5
1.1 Select a Portal.....	5
1.2 Portal & Project Search	6
1.3 Pin/Unpin portals	6
1.4 Welcome page dashboards.....	6
1.4.1 Tasks status Dashboard.....	7
1.4.2 Tasks overview dashboard	7
1.4.3 Pinned Portals dashboard	8
2. Home page	8
2.1 Welcome Pop up message on first login	9
2.1.1 Step 1 - set my contacts	9
2.1.2 Step 2 - set my Insight preferences	9
2.1.3 Step 3 - set my Notification preferences	9
2.1.4 What's New message	10
2.2 Document & Tasks search.....	10
2.3 Welcome block	10
2.4 Navigation menu LINKS.....	11
2.5 Home page dashboard.....	11
2.6 BDO Contacts	11
2.7 Quicklinks	11
2.8 My Insights	11
2.8.1 My Insights carousel	12
2.8.2 My Insights page	12
2.9 Twitter block	12
3. Settings	13
3.1 Client-side team management	13
3.1.1 Portal team management.....	13
3.1.2 Project team management	14
3.2 Notifications	14
3.2.1 Notification Bell.....	15
3.2.2 Custom Folder Message Notifications	15
3.2.3 Notification Summary Email	16
3.3 Personal Settings.....	17
3.3.1 Personal settings	17
3.3.1.1 My Profile	17
3.3.1.2 Notification preferences	18
3.3.1.3 My Insights preferences	18
3.3.2 Virtual Tour	18
3.3.3 Coaching.....	19
3.3.4 Terms and Conditions	19

3.3.5	Feedback	19
4.	Dashboards	20
4.1	Portal dashboard	20
4.1.1	Status dashboard	20
4.1.2	Task type dashboard	20
4.1.3	List view	20
4.1.4	Calendar view	21
4.1.5	Pills dashboard	22
4.2	Project dashboard	22
4.2.1	Status dashboard	22
4.2.2	Task type dashboard	23
4.2.3	Assigned to dashboard	23
4.2.4	List view	23
4.2.5	Calendar view	23
4.2.6	Pills dashboard	23
4.3	Filters	23
4.3.1	Filter “Status”	24
4.3.2	Filter “Type”	24
4.3.3	Filter “Assignee”	24
4.3.4	Master filters	24
4.3.5	Due date filter	25
4.3.6	Project level filters	25
4.3.7	Clear master filters	26
5.	tasks	26
5.1	Request Item	27
5.2	Actions/Milestone	27
6.	task Actions	28
6.1	Provide an attachment to the Request Item	28
6.2	Download responses to the Request Item	28
6.3	Actions	29
6.4	Flag a task	29
6.5	Edit assignees and access	29
6.6	Download Task status change report	30
6.7	Export Task status on Project level	30
7.	Documents actions	31
7.1	Signing and Approval overview page	31
7.2	Read only/editable RI documents	31
7.3	Storing RI files to Documents	32
8.	Documents	33
8.1	Documents structure	33
8.2	Filter documents	33
9.	Search documents	33

10.	Upload a document	34
10.1	File and Folder verification.....	34
11.	Edit a document.....	34
11.1	Edit single document	35
11.2	Edit multiple documents.....	35
11.2.1	Delete files and folders	35
11.2.2	Move files and folders	36
11.2.3	Sort files and folders	36
11.3	Documents & Tasks	36
12.	File/Folder Properties.....	36
12.1	Breadcrumbs.....	37
13.	Manage access to a document	37
13.1	Read-only	37
13.2	Manage Access.....	37

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

REVIEWER

Name	Version	Date
Karolina Mala	5.1	8 November 2022

INTENDED AUDIENCE

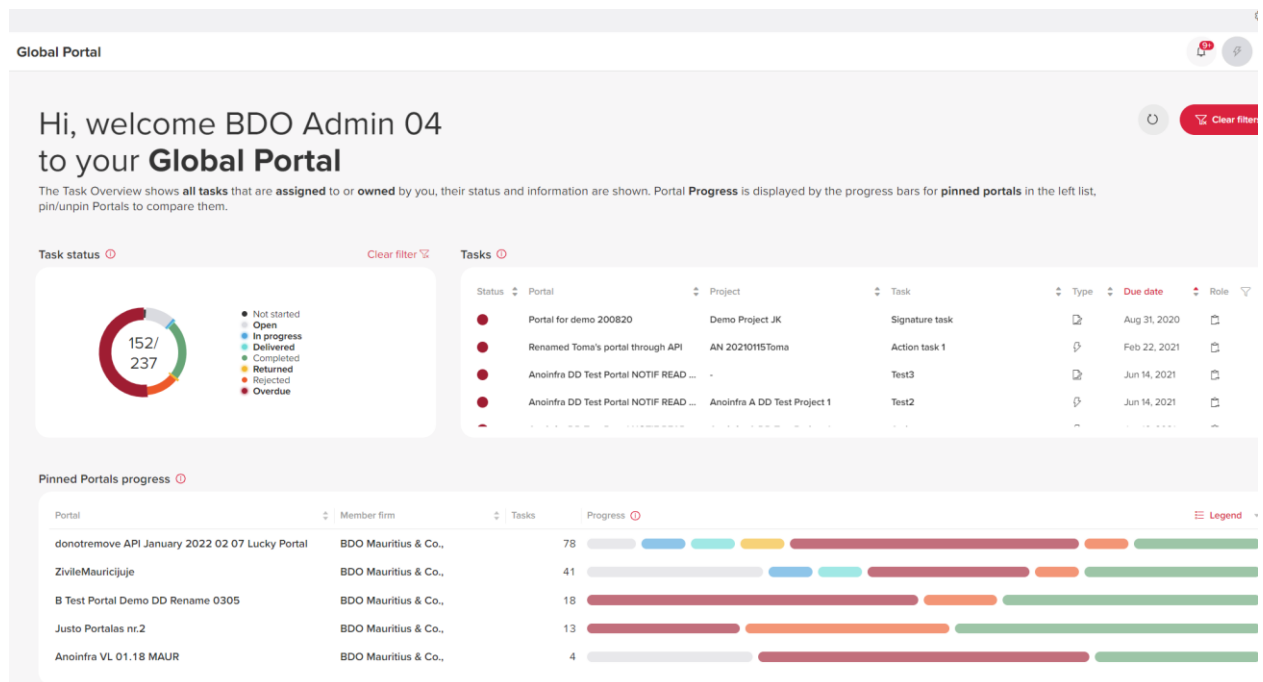
Target Audience
BDO Clients

1. WELCOME PAGE

You have logged in from the [BDO Global Portal Landing page](#), what next?

If you have an access to only one Portal you will be directed to this particular Portal's **Home page** and you will see the dashboard displaying Task status and Task overview.

If you are assigned to more than one Portal, the **Welcome page** will appear providing information about your Pinned Portals and this page dashboard also displays Task status and Task overview.



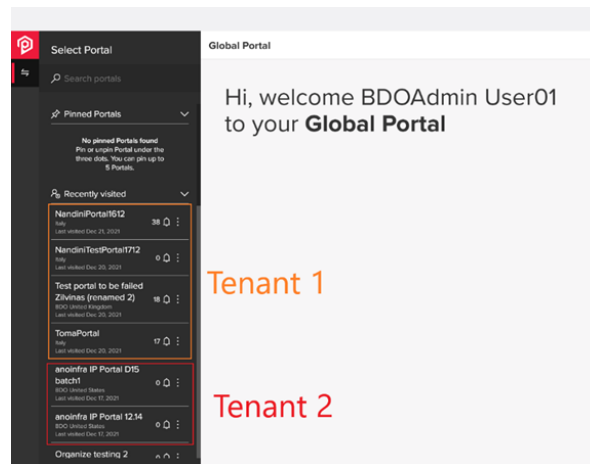
1.1 SELECT A PORTAL

As a Client, you need to be invited to a BDO Global Portal by your BDO Adviser. It is necessary to accept the invitation. When accessing the BDO Global Portal you will be asked to select the Client Portal you wish to work within.

If you have an access to multiple Client Portals and/or tenants, you will be able to select which Client Portal from all Portals from all the tenants in one place. Portals are sorted by Last Visit Date in the descending order (newest one at the top).

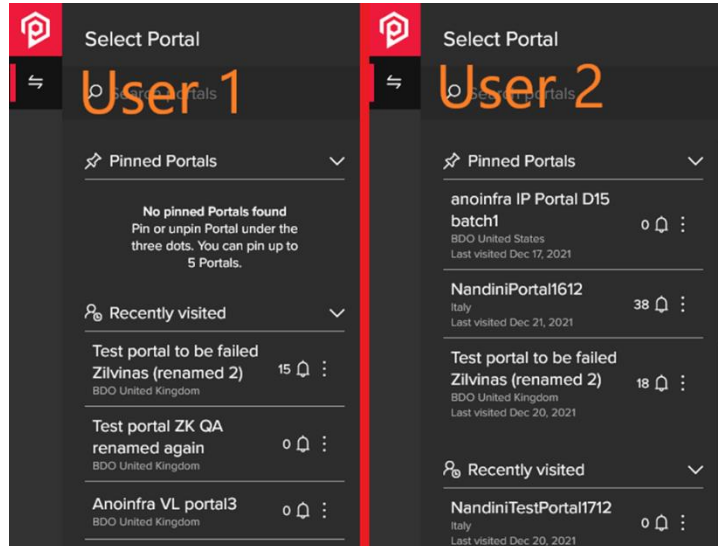
Q. Can I set up my screen to see most important portals?

A. Yes, see Pinned Portals.



You can refine the list of Portals using the search field. Please avoid using single quote (") character in the search keyword as it is not supported.

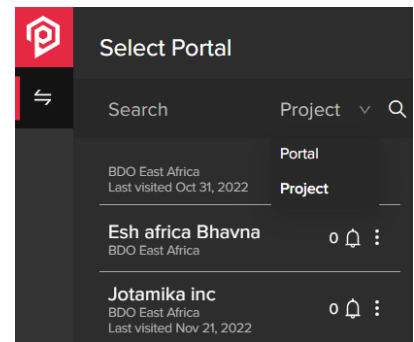
Note: on the right side of each Client Portal there is a notification bell indicating the unread notification count for that Portal and the Projects the specific user has access to.



1.2 PORTAL & PROJECT SEARCH

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

NOTE: When you are being onboarded as a new Client user, a warning message is displayed „We are setting up your BDO Global Portal. Please try again later“ while the account is being set up.

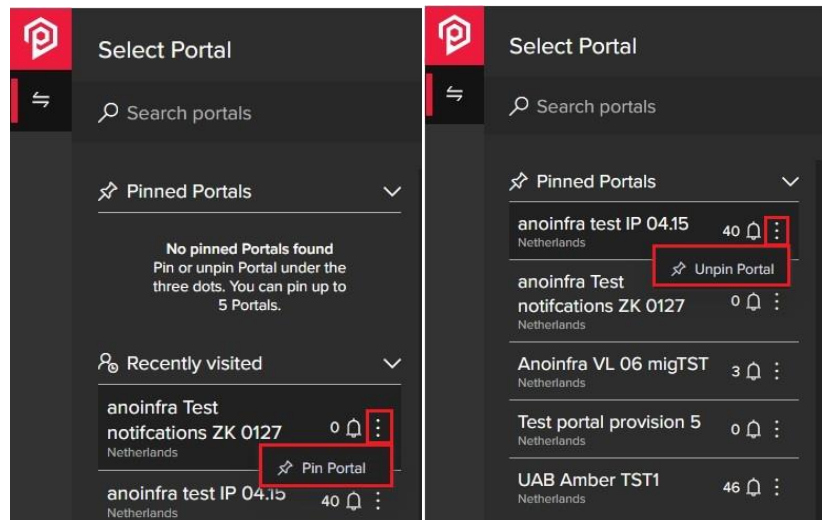


1.3 PIN/UNPIN PORTALS

You can pin up to 5 Portals in the black sidebar that will then show in the Pinned Portals section.

Pinning and unpinning a Portal is possible through the three dots menu next to the Client Portal name.

Pinned Portals are listed in alphabetical order and clicking the pinned Portal, you will be redirected to the selected Portal Home page. The Portal search triggers both sections: Pinned Portals and Recently visited.



1.4 WELCOME PAGE DASHBOARDS

There are three levels of Dashboards within Portal:

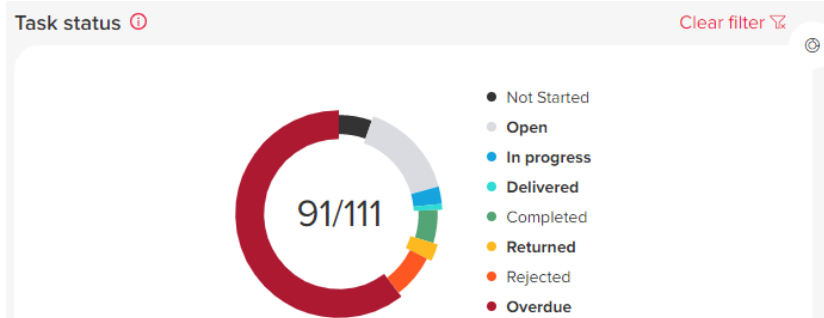
- Welcome page dashboards
- Home page dashboard

- Exchange Next Gen dashboards - Portal level (*for more information, please see the Tasks guide*)
- Exchange Next Gen dashboards - Project level (*for more information, please see the Tasks guide*)

1.4.1 Tasks status Dashboard

The Task status dashboard displays only those statuses, that you are assigned to, meaning if you have tasks in statuses "Open" and "Overdue", the dashboard will show only 2 statuses in total. If user has only task in status "Completed", dashboard will show only one status in total.

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



TASK STATUS NAME	TASK ACTION
<i>Not Started</i>	<i>Tasks start date is in the future</i>
<i>Open</i>	<i>Tasks start date is in the past</i>
<i>In progress</i>	<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>
<i>Delivered</i>	<i>Deliver button has been selected indicating all information has been provided</i>
<i>Completed</i>	<i>Complete button has been selected indicating the information provided satisfies the Request Task OR when all assignees completed their actions (Signing, Approval, Action Tasks)</i>
<i>Returned</i>	<i>When the information provided does not satisfy the Request Task</i>
<i>Rejected</i>	<i>When any of assignees rejected the task (Signing, Approval, Action Tasks)</i>
<i>Overdue</i>	<i>When a task is not completed, and the due date is in the past"</i>

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

1.4.2 Tasks overview dashboard

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

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

Status	Portal	Project	Task	Type	Due date	Role
●	Portal for demo 200820	Demo Project JK	Signature task	📄	Aug 31, 2020	📄
●	Renamed Toma's portal through API	AN 20210115Toma	Action task 1	📄	Feb 22, 2021	📄
●	Anoinfra DD Test Portal NOTIF READ ...	-	Test3	📄	Jun 14, 2021	📄
●	Test Portal NOTIF READ ...	Anoinfra A DD Test Project 1	Test2	📄	Jun 14, 2021	📄

1.4.3 Pinned Portals dashboard

Pinned Portal dashboard will generate data if at least one Portal is pinned in the sidebar with following details:

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

Portal	Member firm	Tasks	Progress
donotremove API January 2022 02 07 Lucky Portal	BDO Mauritius & Co.,	78	
ZivileMauricijuje	BDO Mauritius & Co.,	41	
B Test Portal Demo DD Rename 0305	BDO Mauritius & Co.,	18	
Justo Portales nr.2	BDO Mauritius & Co.,	13	
Anoinfra VL 01.18 MAUR	BDO Mauritius & Co.,	4	

The pills are ordered left to right depending on the status order (different from the doughnut dashboard).



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

2. HOME PAGE

After you login to the BDO Global Portal and review the Welcome page (in case of being assigned to multiple Portals) you will see the Portal Home page. The Home page can be modified by Firm level portal users with elevated permissions. It is advised to reach out to the Service desk for support while setting the content.

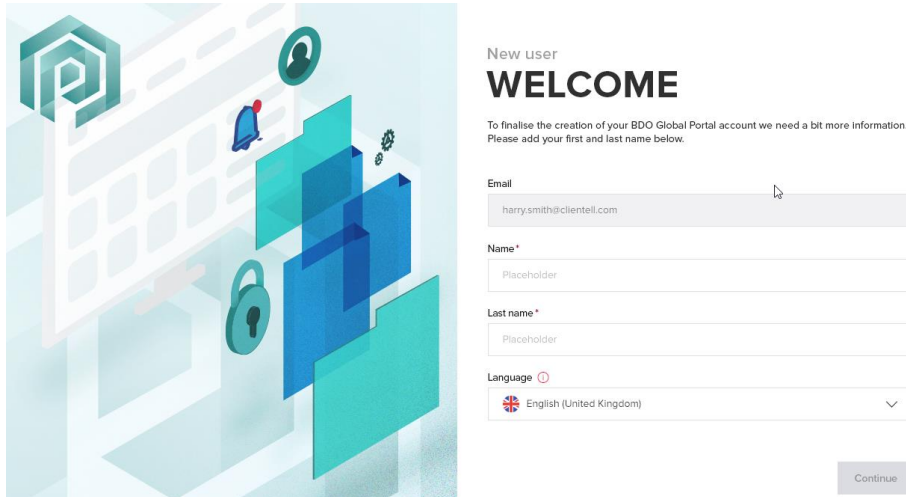
2.1 WELCOME POP UP MESSAGE ON FIRST LOGIN

A new Welcome pop up comes in three modal windows:

- The main Welcome window where you can update your contact details,
- Insights preferences where you can set the Insights preferences,
- Notification preferences, where you can change the notification settings.

2.1.1 Step 1 - set my contacts

Please fill in your contact details and submit them by clicking on Continue.






New user
WELCOME

To finalise the creation of your BDO Global Portal account we need a bit more information. Please add your first and last name below.

Email
harry.smith@clientell.com

Name*
Placeholder

Last name*
Placeholder

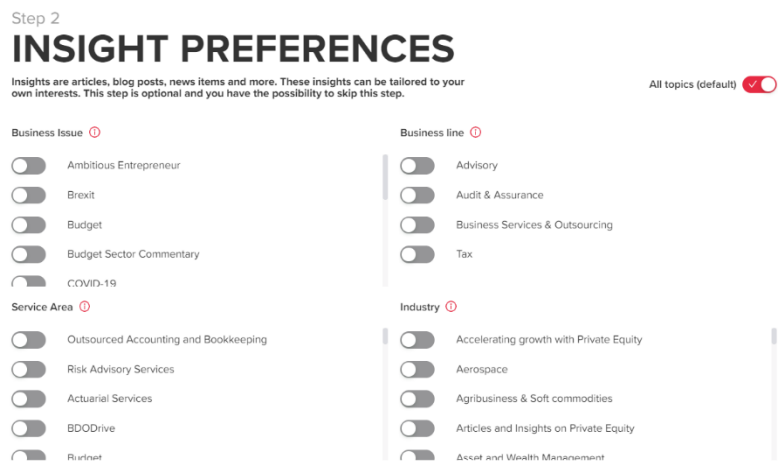
Language 
 English (United Kingdom) 

Continue

2.1.2 Step 2 - set my Insight preferences


Set Insight Preferences on the second Welcome modal window same as later via Personal Settings.


Insights preferences step is not mandatory and could be skipped by clicking "Skip" button on the bottom right corner. In this case default Insight preferences settings will be saved.




Step 2
INSIGHT PREFERENCES

Insights are articles, blog posts, news items and more. These insights can be tailored to your own interests. This step is optional and you have the possibility to skip this step.


All topics (default) 

Business Issue 


- Ambitious Entrepreneur
- Brexit
- Budget
- Budget Sector Commentary
- COVID-19

Business line 

- Advisory
- Audit & Assurance
- Business Services & Outsourcing
- Tax

Service Area 

- Outsourced Accounting and Bookkeeping
- Risk Advisory Services
- Actuarial Services
- BDODrive
- Rurinet

Industry 

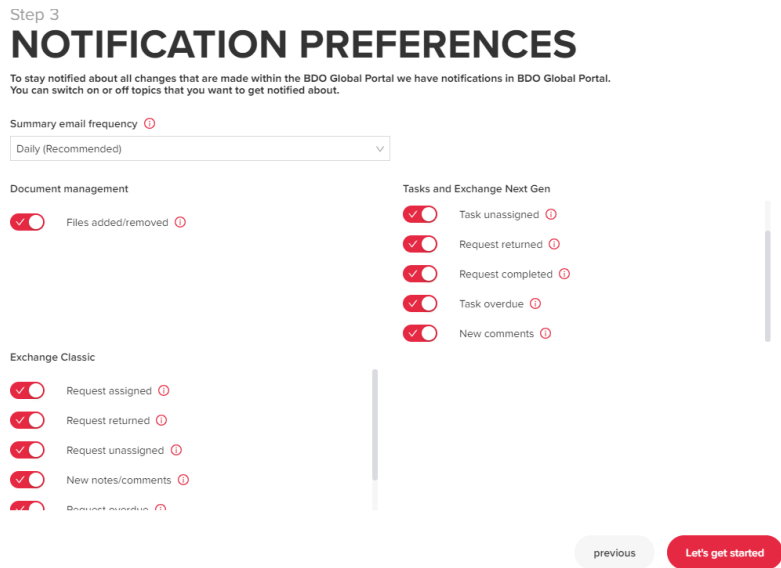
- Accelerating growth with Private Equity
- Aerospace
- Agribusiness & Soft commodities
- Articles and Insights on Private Equity
- Asset and Wealth Management

2.1.3 Step 3 - set my Notification preferences

New user is able to set all the Notification preferences, as they do via Personal settings - the view is exactly the same. BDO and Client users will see different view (as they do in Personal settings):

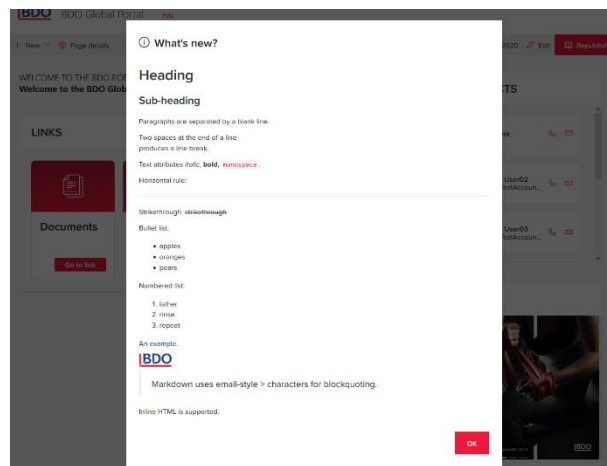
1. Frequency of an email can be selected via drop down:
 - a. None;
 - b. Daily;
 - c. Weekly.
 - d.

2. Toggles can be switched ON and OFF for these groups (BDO user's example):
- Project provisioning;
 - Team management;
 - Tasks and Exchange Next Gen;
 - Portal and Project management;
 - Document management;
 - Exchange Classic.



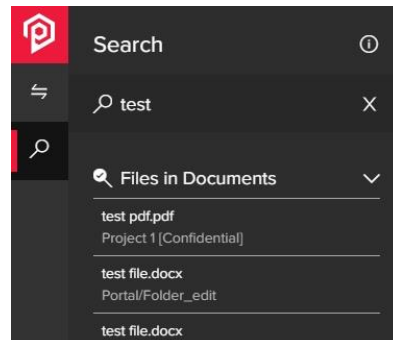
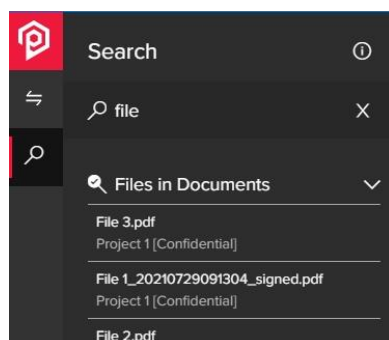
2.1.4 What's New message

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



2.2 DOCUMENT & TASKS SEARCH

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



2.3 WELCOME BLOCK

Welcome block content and position is specific to a landing page it is set up on. This allows to deliver different welcome message for different language if needed.

Welcome block is optional. A landing page can be configured without a Welcome block.

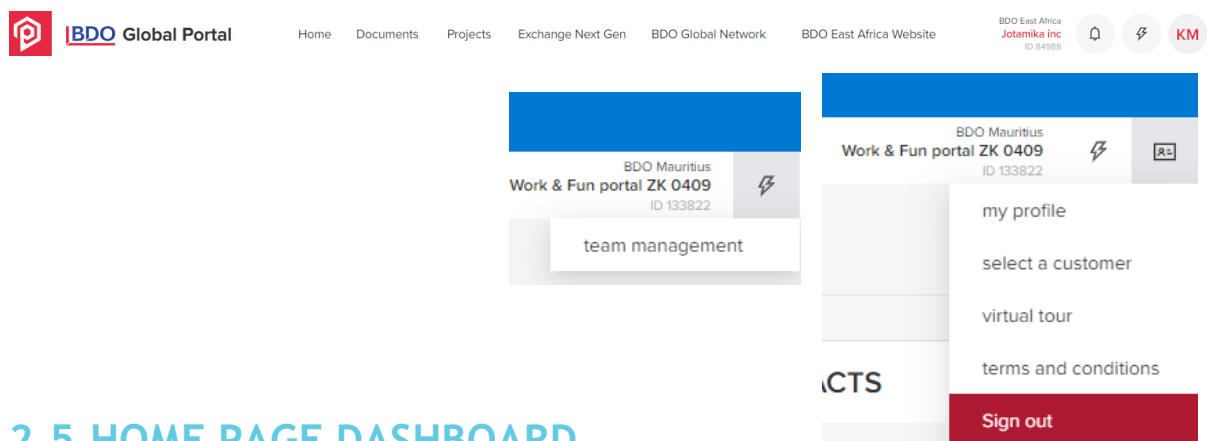
If Welcome block is setup on the landing page, it will appear at the left side of the home page to any portal user who has selected the language the page corresponds to.



1

Welcome block content supports simple text mark-up options as well as links and tables:

2.4 NAVIGATION MENU LINKS

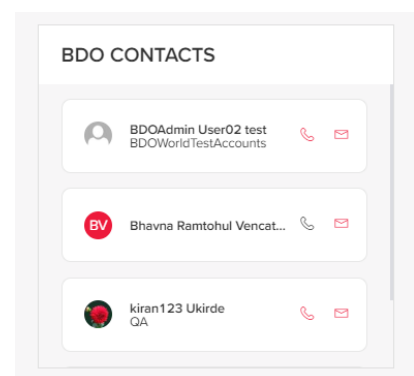


2.5 HOME PAGE DASHBOARD

A dashboard overview with the list of tasks was created on Portal Home page. The dashboard represents list of your Exchange Next Gen tasks to which you are assigned to. The dashboard can be sorted and filtered just like the dashboards that are in Exchange Next Gen.

2.6 BDO CONTACTS

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



2.7 QUICKLINKS

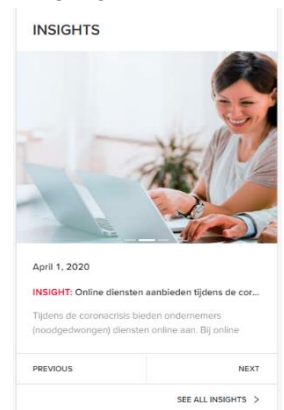
The Quick links block appears under the dashboard and the tiles can be translated via the Admin toolkit. The Quick links are displayed to both BDO and Client users.

2.8 MY INSIGHTS

Information appearing in My Insights is extracted from the BDO Firm website and is managed by the BDO Firm. If the BDO firm website offers insights in multiple languages and the language selected in the user profile matches, then you will see only insights in that specific language.

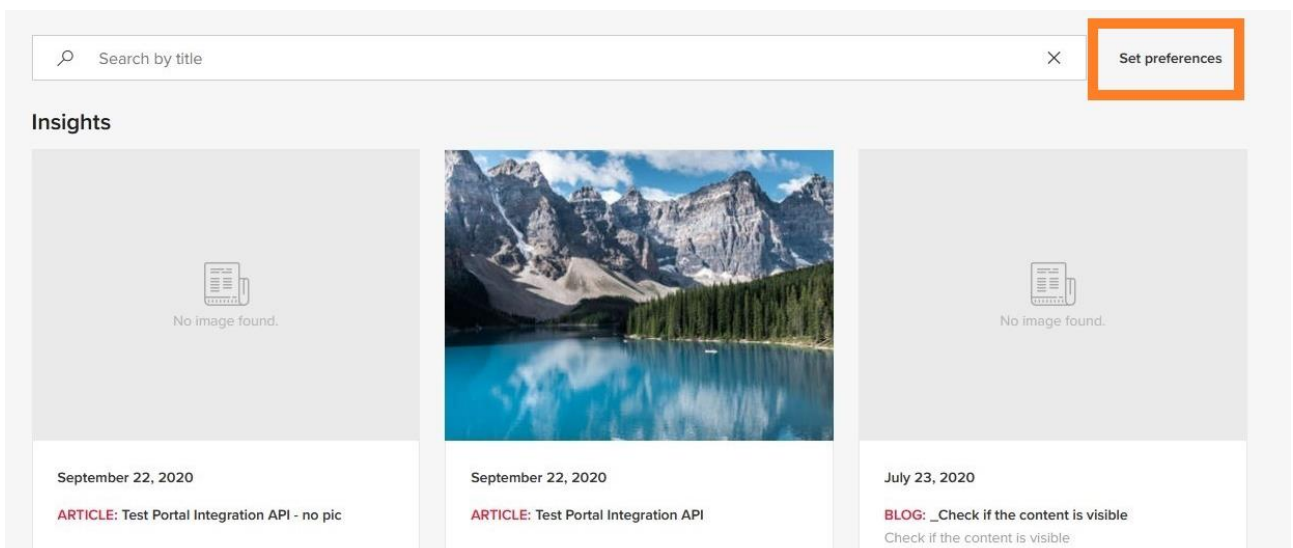
2.8.1 My Insights carousel

Insights will feature up to the 3 most recent insights available on the BDO firm website. Clicking on the Insight will re-direct you to the article.



2.8.2 My Insights page

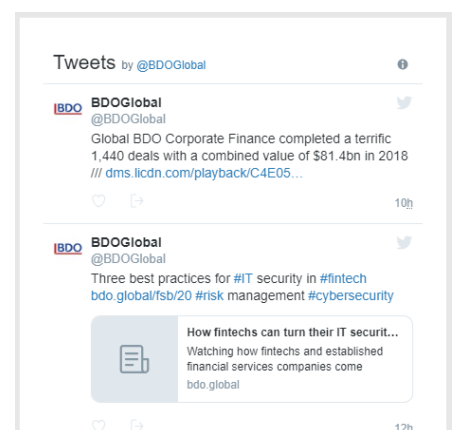
At the top, there is the Insights section, a search box to search the contents of Insights and a button to the right for quick access to the My Insights Preferences. Beneath are the filtered insight articles.



The page will initially show 6 Insights ordered by most recently published articles on top. Clicking “Show more” will load three Insights at a time, but no more than 15 Insights. If there are more than 15 Insights available on the BDO Firm website, then Insights page will feature a link to the BDO Firm insights page to access all insights.

2.9 TWITTER BLOCK

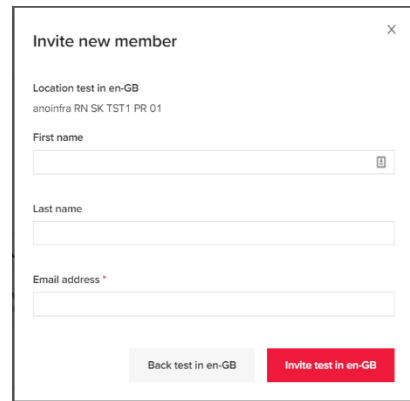
The Twitter or social media account may be presented on the Home page of the BDO Global Portal. This presents all users with BDO’s latest social media posts.



3. SETTINGS

3.1 CLIENT-SIDE TEAM MANAGEMENT

As the Client Admin user, you can add/remove users to/from Client Admin and Client User groups. Users who are members of Client User group on any specific project can't manage other user permissions. Please also note that BDO Portal user can't manage their own permissions. Except BDO MF Tech Admin as this user can manage both BDO and Client-side user as well as his own permissions. To add a user to a group, click on '+ Add User'. Email is mandatory, first and last name fields are optional for inviting a new user to a Client Portal:



Invite new member

Location test in en-GB
anoinfra RN SK TST1 PR 01

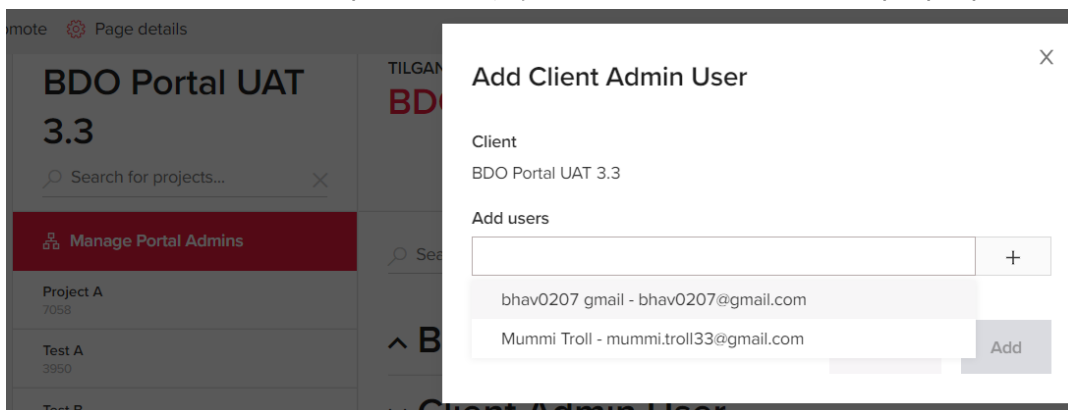
First name

Last name

Email address *

Back test in en-GB Invite test in en-GB

If you wish to add already existing user to the Client Portal (has access to one of the projects under the Client Portal or to the portal itself), you can select them from the people picker:



Page details

BDO Portal UAT 3.3

Search for projects...

Manage Portal Admins

Project A 7058

Test A 3950

Test B

Add Client Admin User

Client
BDO Portal UAT 3.3

Add users

bhav0207 gmail - bhav0207@gmail.com

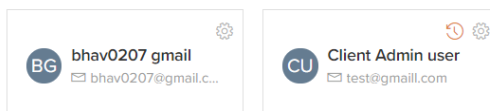
Mummi Troll - mummi.troll33@gmail.com

Add

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

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

Client Admin User



BG bhav0207 gmail
bhav0207@gmail.c...

CU Client Admin user
test@gmail.com

+ Add user

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

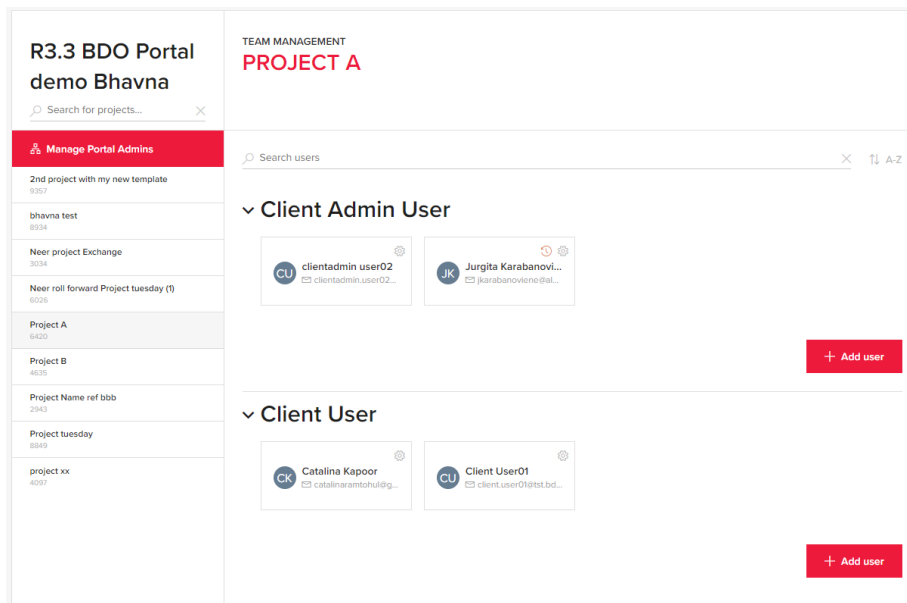
3.1.1 Portal team management

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

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

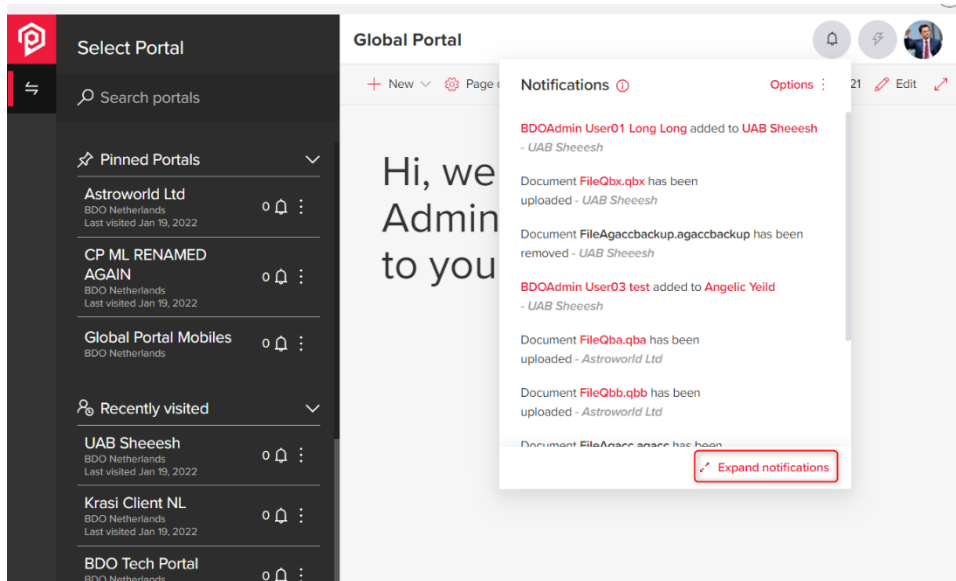
3.1.2 Project team management

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

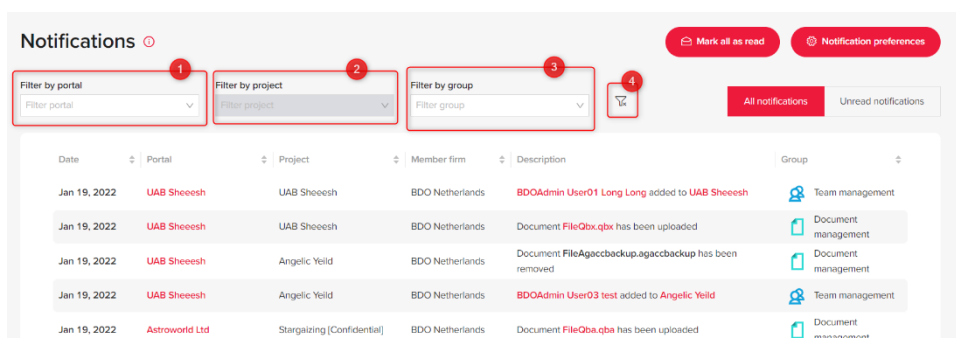


3.2 NOTIFICATIONS

When you log in to a Portal and click the notification bell in the top right part of the tool ribbon, select the "Expand notification" to be navigated to the Notification Log which is applied globally.



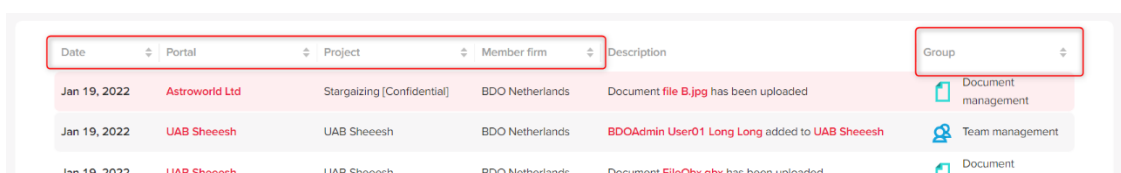
Notifications can be filtered by results listed according to the selected filter, by Portal^[1], Project^[2] and Group^[3]. These filters can be removed individually or at the same time by pressing the Clear filters^[4] button.



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

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

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



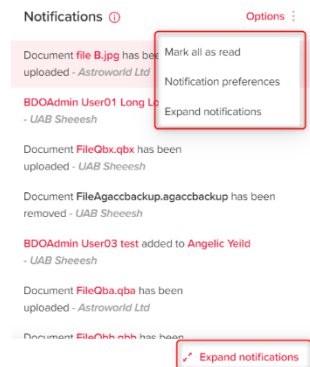
The Notification Log has paging of 10 notifications per page. To navigate the pages, use the numbering and navigation arrows at the bottom right corner of the screen. You can mark all notifications as read, disregarding the filter.

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

3.2.1 Notification Bell

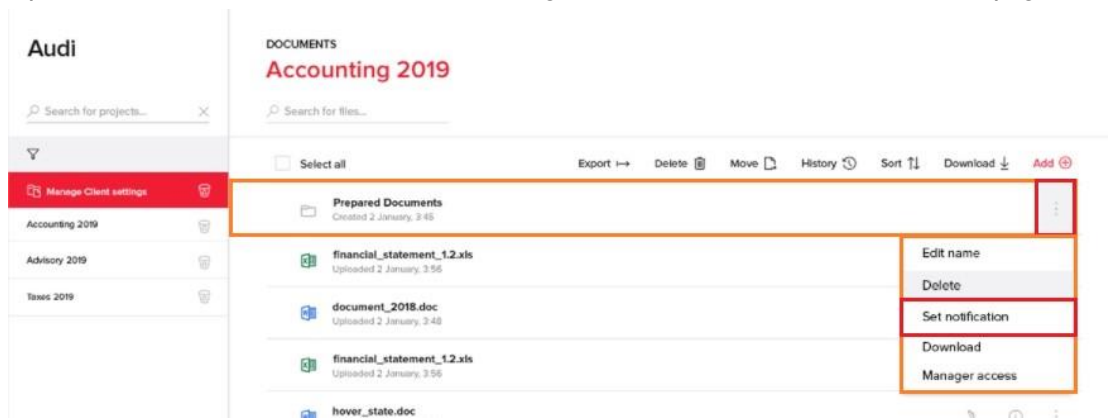
The notification bell shows a preview number of how many unread notifications you have. By clicking the three dots in the upper right corner of the modal window, a drop down with multiple selections will appear.

The “Expand notifications” button at the bottom right corner of the modal window, which also redirects you to the full notification log. The notifications update on page re/loading and clicking on the notification bell.



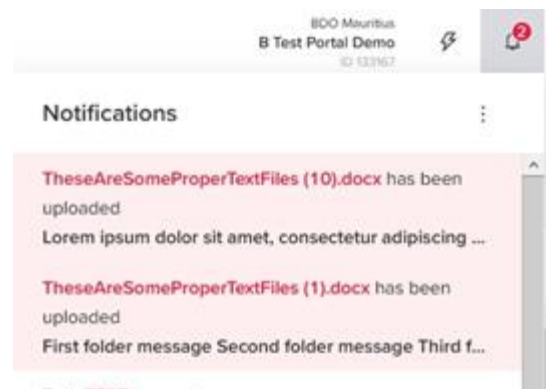
3.2.2 Custom Folder Message Notifications

It is possible to set a custom notification message for a folder within the Documents page.



If text is added the “Set notification” button becomes enabled, if any text is already added from a previously existing message, the “Delete notification” button becomes usable.

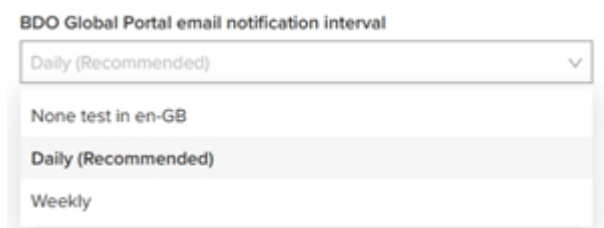
Log in to the Portal, upload a file to a folder that has a custom folder notification set. After a successful upload, you receive a notification. The Notification Log will display the same as the notification bell.



3.2.3 Notification Summary Email

You will receive a summary email (daily or weekly) about unread notifications that are not expired. Unread notification older than 7 calendar days are set as read.

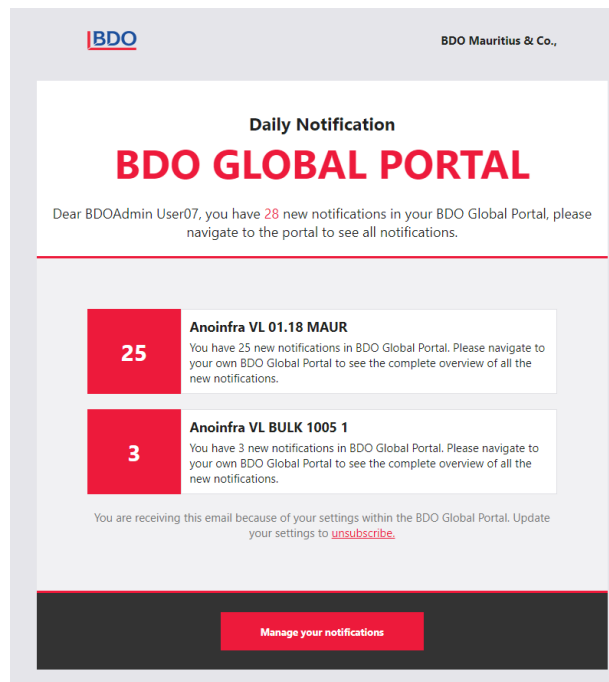
The unsubscribe link at the bottom of the Summary email is enabled and you will be redirected to the Portal log in page. After logging in, the summary email frequency and other notification preferences can be changed in the Notifications preferences page to:



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

The email contains:

1. BDO Logo
2. Member Firm name
3. Type of notification email (*Daily, Weekly*)
4. An accurate description and a bubble with the number of the unread notification count in the Member firm for that user
5. A list of Portals you have an access to:
 - a. With a description and number of unread notifications for the Portal
 - b. Additionally, there is a text box beneath all Portal list with a hyperlink, to quickly unsubscribe form the Global notification summary email.
6. A link to the Manage your notifications. Clicking on "Manage your notifications" in Summary email you will be navigated to the portal log in page and then to the Notification list.



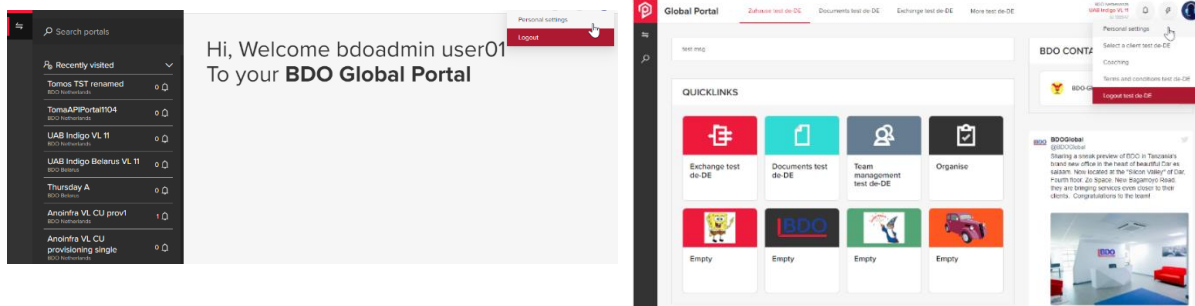
3.3 PERSONAL SETTINGS

3.3.1 Personal settings

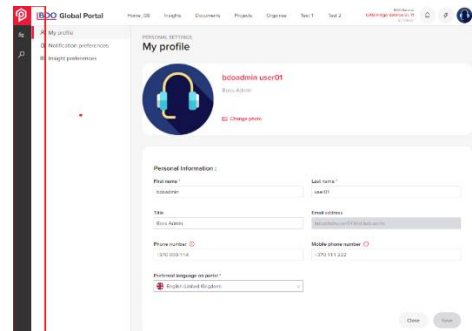
Personal settings - My profile are synchronised between the Firms and tenants. Details that will synchronise within tenants are: Name, Last name, Title and Phone number. Users profile picture and mobile phone number will not synchronise due to Client application permission limitations. This means that you will have to update each tenant with their picture and mobile phone number.

3.3.1.1 My Profile

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



Photos can be changed by clicking on "Edit profile picture" or hovering over the photo and clicking on it. Size and accepted file types are: BMP, JPEG, or PNG Size: 1MB advised - 4.76MB max.



3.3.1.2 Notification preferences

You will be able to set your preferences for Document management, Tasks and Exchange Next Gen and Exchange Classic. A tooltip is available next to each toggle.

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

Summary email preferences

Summary email frequency ⓘ

Notification preferences

<p>Document management</p> <p><input checked="" type="checkbox"/> Files added/removed ⓘ</p> <p>Exchange Classic</p> <p><input checked="" type="checkbox"/> Request assigned ⓘ</p> <p><input type="checkbox"/> Request returned ⓘ</p> <p><input type="checkbox"/> Request unassigned ⓘ</p> <p><input type="checkbox"/> New notes/comments ⓘ</p> <p><input type="checkbox"/> Request overdue ⓘ</p> <p><input type="checkbox"/> Request accepted ⓘ</p>	<p>Tasks and Exchange Next Gen</p> <p><input checked="" type="checkbox"/> Task assigned ⓘ</p> <p><input checked="" type="checkbox"/> Task unassigned ⓘ</p> <p><input checked="" type="checkbox"/> Request returned ⓘ</p> <p><input checked="" type="checkbox"/> Request completed ⓘ</p> <p><input checked="" type="checkbox"/> Task overdue ⓘ</p> <p><input checked="" type="checkbox"/> New comments ⓘ</p>
--	--

Frequency options are:

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

3.3.1.3 My Insights preferences

My Insights preferences shows four main categories including a tooltip icon:

- Business Issue: Content relevant to one business topic, these are usually topical or trending
- Business line: Content relating to BDO's core services
- Service Area: Content relating to a more specific service offering within our core services
- Industry: Content relating to a specific industry sector.



3.3.2 Virtual Tour

Virtual tour is an optional content which can be set up by BDO Firms helping you to learn about the Portal functionality.

3.3.3 Coaching

The coaching session provides an introduction to Portal pages and its functionalities. Coaching session starts with first pop up window - “Introduction”. “Introduction” has two options: “Don’t show again” and “Start”.

Press “Start” to begin the Coaching session. To close the session press “Don’t show again”.

Introduction

Welcome to the BDO Global Portal. In a few simple steps we will show you what you can do in the Global Portal and where to look.

You can access coaching later via personal settings menu.

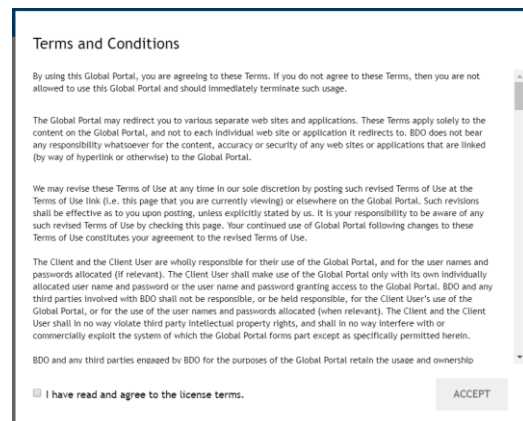
Don't show again

Start

3.3.4 Terms and Conditions

You need to accept the Terms and Conditions upon first login to the BDO Global Portal. If the Terms and Conditions are updated, then you will be prompted to reaccept them.

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



3.3.5 Feedback

When you log into the BDO Global Portal a new red “Feedback” button on the bottom right corner of the window appears.

Home Documents Exchange Organise Other

Gohango

Welcome Title

Welcome word and some information. Completely synergize resource taxing relationships via premier niche markets. Professionally cultivate one-to-one customer service with robust ideas. Dynamically innovate resource-leveling customer service for state of the art customer service.


Links

- Documents [Go to link](#)
- Exchange [Go to link](#)
- Organise [Go to link](#)
- Team management [Go to link](#)

BDO Contacts

- Harry Smith [Go to link](#)
- Samantha Basque [Go to link](#)
- Thomas Estinger [Go to link](#)

Insights



18 November 2019

INSIGHT: The BDO 600 – 2019 Study on CEO/CFO Compensation

This unique study focuses on middle market public companies and provides a comprehensive analysis of CEO and CFO compensation trends.

PREVIOUS [See](#)

How was your experience using BDO Global Portal

☆☆☆☆☆

Feedback message

Enter additional feedback here

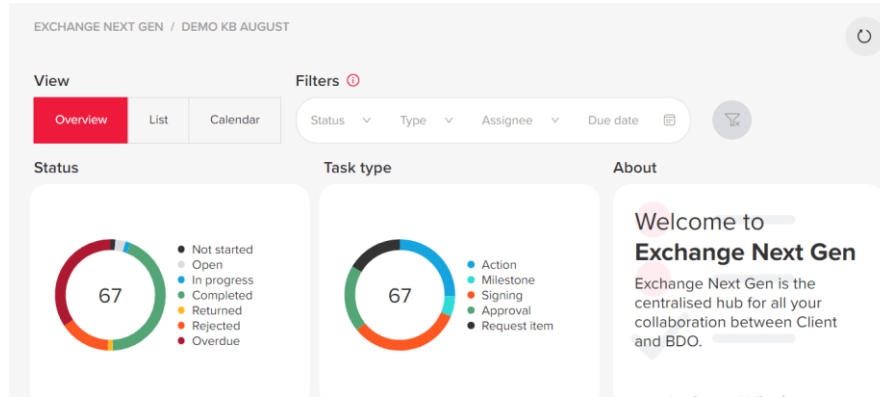
[Send](#)

[Feedback](#)

4. DASHBOARDS

4.1 PORTAL DASHBOARD

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



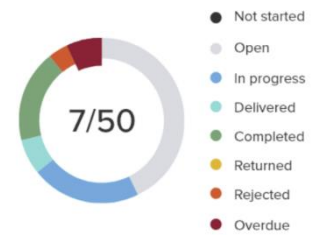
4.1.1 Status dashboard

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.

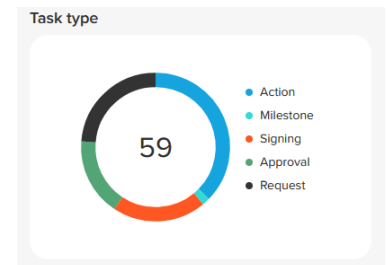


4.1.2 Task type dashboard

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

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

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



4.1.3 List view

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

EXCHANGE NEXT GEN / DEMO KB AUGUST

View: Overview | Let | Calendar

Filters: Status | Type | Assignee | Due date

Tasks: Clear filter

Status	Index	Task title	Due date	Project	Task group	Type	Actions	Entity	Period end	Other	Location	Assigned to
●	25	New RI task	Aug 9, 2021	First project	aaa	Request	👁	-	Dec 27, 2025	-	-	-
●	11	New action group task	May 1, 2022	Second project	Action group	Action	🚩	-	-	-	-	AB
●	3	Overdue Milestone task	Jul 31, 2022	Second project	Overdue group	Milestone	👁	-	-	-	-	-
●	15	Milestone task	Aug 1, 2022	First project	Newer	Milestone	👁	-	-	-	Newer	-
●	1	Signing task	Aug 1, 2022	-	Signing group	Signing	👁	-	-	-	-	AB
●	2	Open action task	Aug 1, 2022	Second project	Action group	Action	👁	-	-	-	-	AB
●	6	RI task 2	Aug 1, 2022	Second project	RI group	Request	👁	-	-	TST	Lafala	Heha
●	7	Action task for client user	Aug 1, 2022	Second project	Action group	Action	👁	-	-	-	-	AB
●	10	MLST	Aug 3, 2022	Second project	Action group	Milestone	👁	-	-	-	-	-
●	8	Assigned overdue	Aug 3, 2022	First project	Signing group	Signing	👁	-	-	-	-	AB
●	10	Not assigned overdue	Aug 3, 2022	First project	Signing group	Signing	👁	-	-	-	-	AB
●	4	FMS NN	Aug 4, 2022	-	Signing group	Signing	👁	-	-	-	-	AB
●	5	Approval for me	Aug 4, 2022	-	Signing group	Signing	👁	-	-	-	-	AB

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

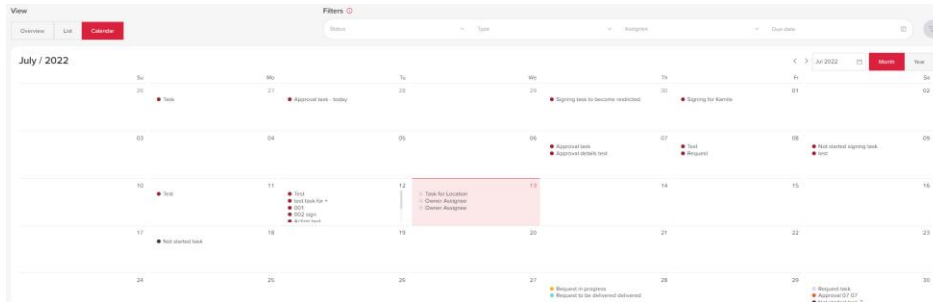
By default, all tasks in the table are sorted by Due date from older to newer.

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

4.1.4 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.

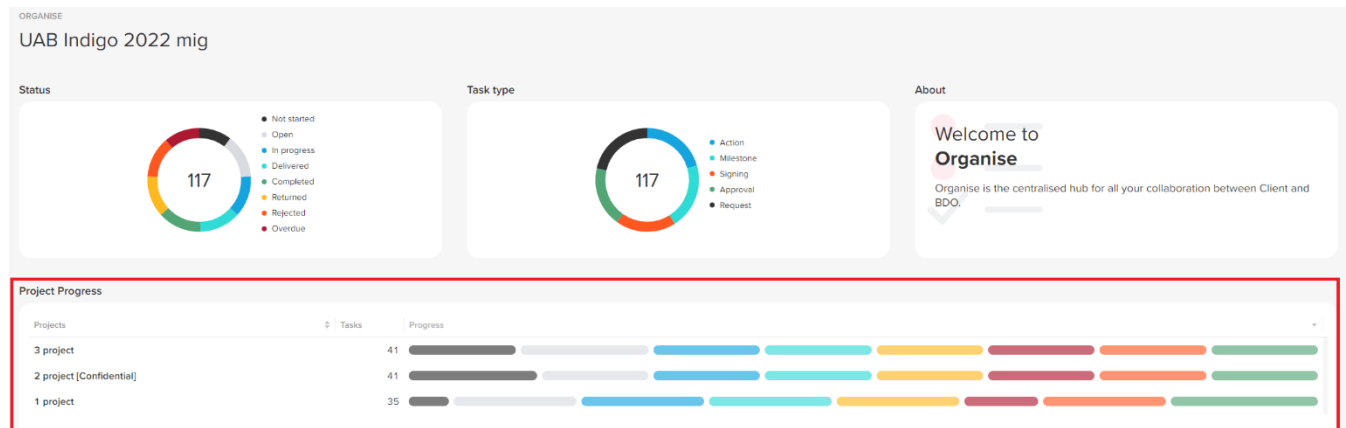


It is important to notice that Calendar view display depend on Master date filter, i.e. if the filtered period is within single month, the month is shown. If filtered period is between few months in the same year, the year is shown, which includes the filtered period. In case filtered period includes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

If task does not have a due date, it will not be displayed in the Calendar view. In cases of more tasks on the same day or month, a full task list is enabled using a scrollbar.

4.1.5 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.

4.2 PROJECT DASHBOARD

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

4.2.1 Status dashboard

Please see the Portal dashboard section above.

4.2.2 Task type dashboard

Please see the Portal dashboard section above.

4.2.3 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 colors (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

4.2.4 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

4.2.5 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.

4.2.6 Pills dashboard

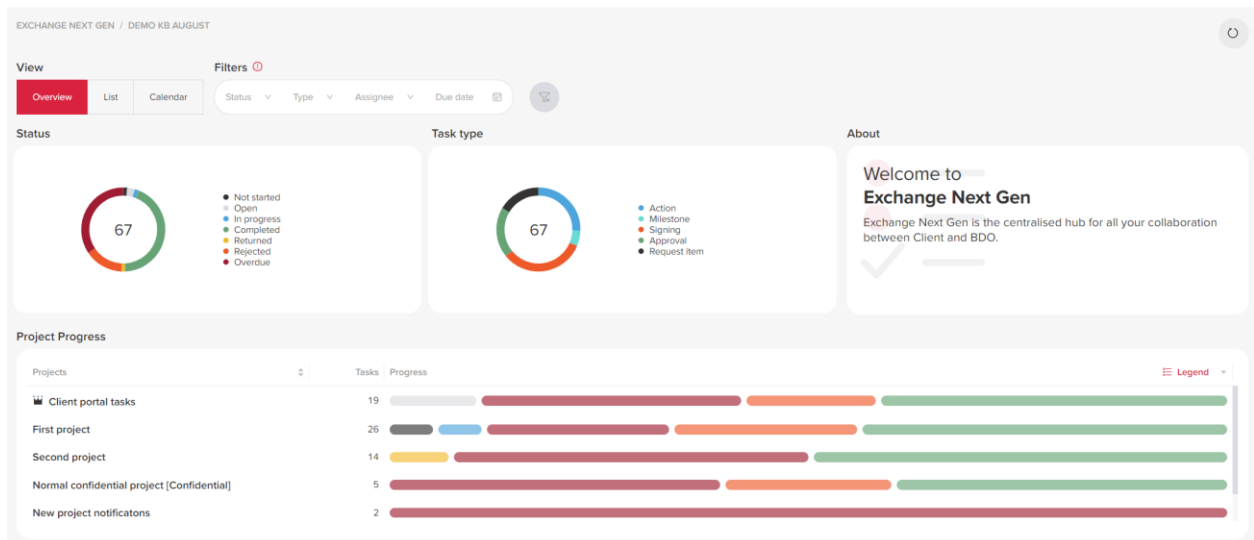
The Pills dashboard works in the same manner as dashboard "Status"/"Task type". Please see the Portal Pills dashboard section above.

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

4.3 FILTERS

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

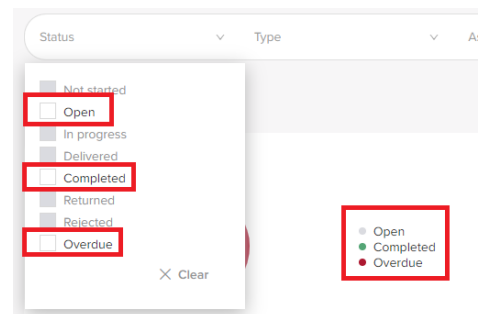


These filters will be used with user's selection while changing view between "Overview", "List" and "Calendar". After each selection the page updates all dashboards, because filters are directly connected to Doughnuts "Status", "Type" and "Assigned to" ("Assigned to" doughnut is on project level only).

4.3.1 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.



4.3.2 Filter "Type"

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

4.3.3 Filter "Assignee"

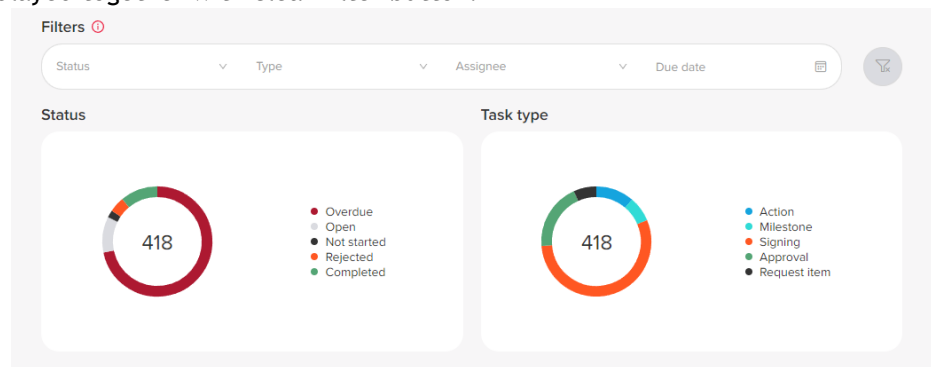
The "Assignee" filter behaves the same as the "Status" and "Type" filter. Only available assignees are displayed and the multiple selection is available on the Project level only. Additional option of search is available on top, search starts with start of typing. Selected assignees are not affected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

4.3.4 Master filters

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

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

- Status
- Type
- Assignee
- Due Date



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

4.3.5 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".

4.3.6 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.

Status	Index	Task title	Due date	Task group	Type	Actions
Overdue	25	New RI task	Aug 9, 2021	aaa	RI	[-] [-] [-]
Completed	15	Milestone task	Aug 1, 2022	Newer	Milestone	[+] [-] [-]
Overdue	8	Assigned overdue	Aug 3, 2022	Signing group	Signing group	[+] [-] [-]
Overdue	10	Not assigned overdue	Aug 3, 2022	Signing group	Signing group	[+] [-] [-]
Completed	3	Signing CA	Aug 4, 2022	Signing group	Signing group	[+] [-] [-]
Overdue	4	Signinf CAA	Aug 4, 2022	Signing group	Signing group	[+] [-] [-]
Completed	5	Action for me	Aug 4, 2022	Approval group 1234	Approval	[+] [-] [-]
Overdue	6	Action for me again	Aug 4, 2022	Signing group	Signing group	[+] [-] [-]
Completed	7	Assigned open	Aug 4, 2022	Signing group	Signing group	[+] [-] [-]
Overdue	9	Not assigned open	Aug 4, 2022	Signing group	Signing group	[+] [-] [-]

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)

4.3.7 Clear master filters

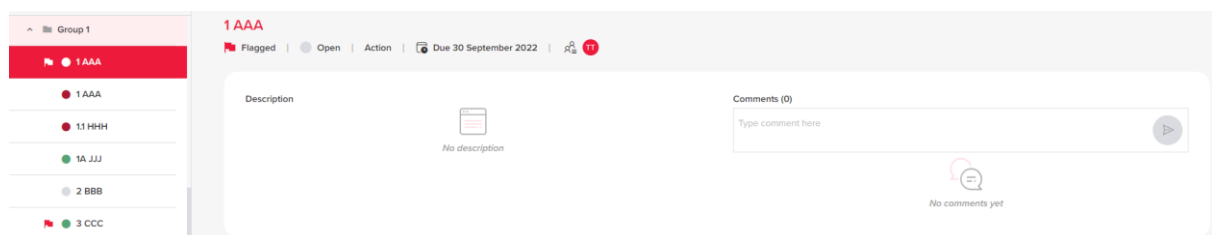
Button "Clear Master filters" is added next to Master filters in Project and Portal level dashboards and in all views - Overview, Calendar and List. Button "Reload data" is added in Portal and Project level dashboards and in all the views.

5. TASKS

There are three types of Tasks:

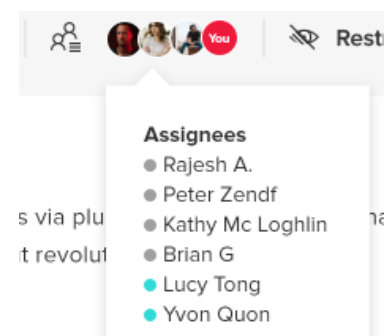
- Request Items
- Actions
- Milestones

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 color coding used to describe the progress of the users:

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



5.1 REQUEST ITEM

The Request Item status is indicated by the status name and a colored 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 RI task is created without a start date, or start date is today or earlier than today, RI 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 RI task, clicks on „Deliver request“ button, task status becomes Delivered. "Deliver request" button is not active and greyed out after delivery was made. All uploaded files becomes read only in Exchange NG and in Documents page. If user adds additional file to uploads, or a new comment, task status goes back to In progress. All files become editable, until User clicks on „Deliver request“ button again, and task will be Delivered, with all files in read only mode.</i>
Completed 	<i>Task was completed and does not require any additional actions. All files in Uploads becomes read only in Exchange NG and in Documents page. BDO user sees Return and Export buttons at the end of Task Overview page. The RI task can't be edited when task is status Completed.</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 RI, he can return it by clicking on the "Return" button. RI can be return as many times as it is necessary. All added documents in Returned status are editable and task is editable too. Clicking "Return" button a mandatory pop up window opens. A reason for returning is required and it can be no longer than 1000 characters. After text is entered, "Send" button becomes active. 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>

5.2 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 colored bubble next to it.

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

6. TASK ACTIONS

6.1 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.

6.2 DOWNLOAD RESPONSES TO THE REQUEST ITEM

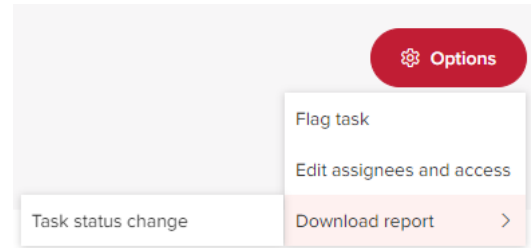
You are able to download files from ONE project's Request tasks. Only Request task documents could be downloaded. Download button is displayed at the right top of list view and active if Project does have at least one Request task, otherwise the button is greyed out and inactive.

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.

6.3 ACTIONS

You can perform the following actions with all tasks:

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



6.4 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:

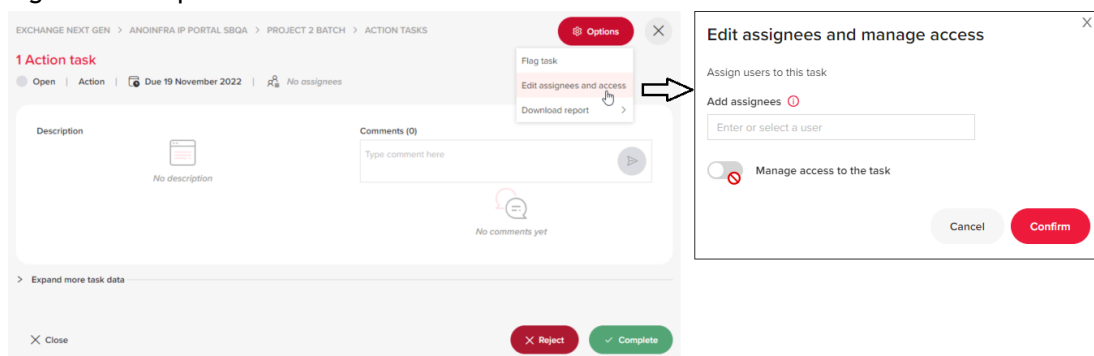
1. Flagged option should be available in Group Tasks by dropdown;
2. If you select Flagged option, menu will show 2 folders with flagged and unflagged tasks:
 - a. flagged folder shows task list of flagged tasks listed by due date, with earliest due date on top.
 - b. not flagged folder shows tasks list 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.

6.5 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:

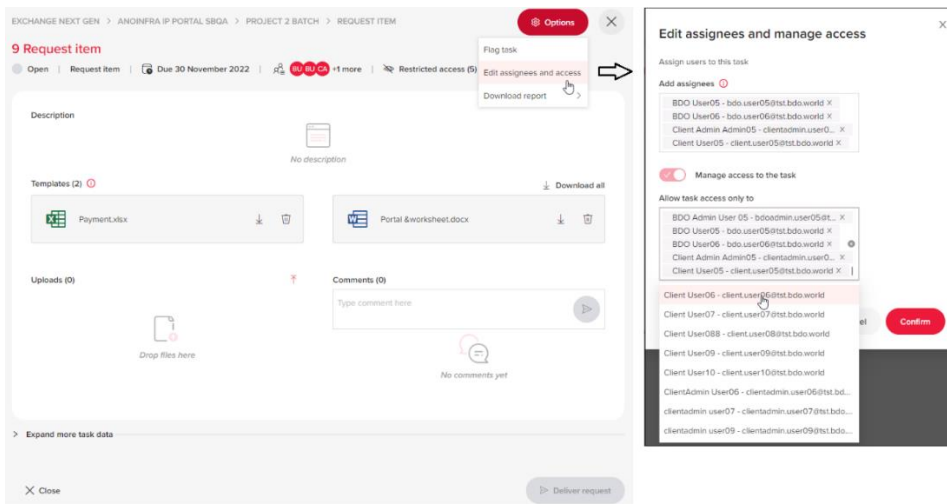
- Client Portal Admin
- Client Project Admin
- Client Project User

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.

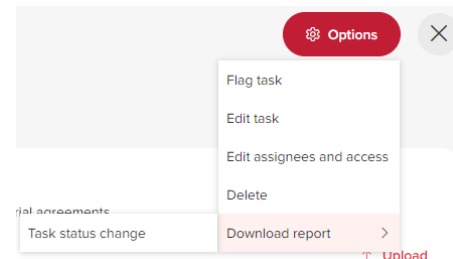


6.6 DOWNLOAD TASK STATUS CHANGE REPORT

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

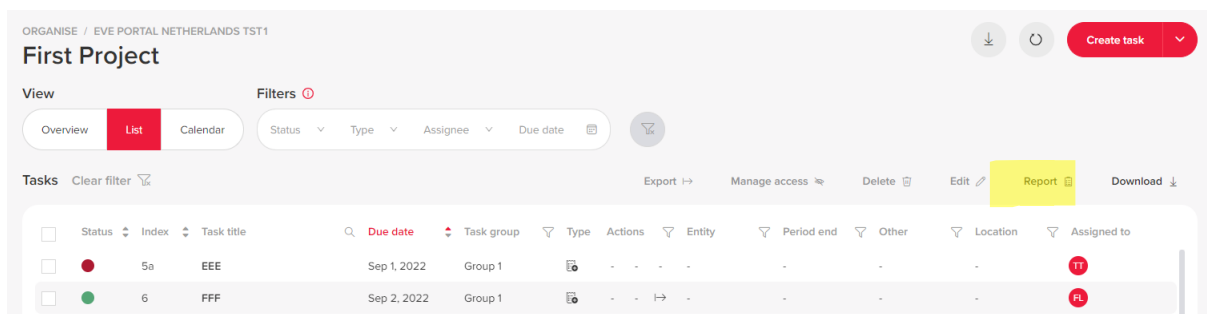
Any user that has access to the task is now able to download “Task status change” report via Options -> Download report -> Task status change.

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



6.7 EXPORT TASK STATUS ON PROJECT LEVEL

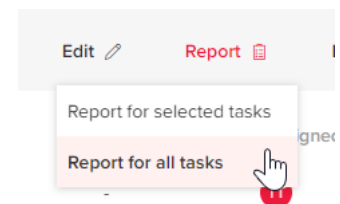
Any user that has access to the Task can download Task Status Change Report. Click on the ‘Report’ button in a Project level in List view.



Two options displayed:

- Reports for selected tasks
- Report for all tasks

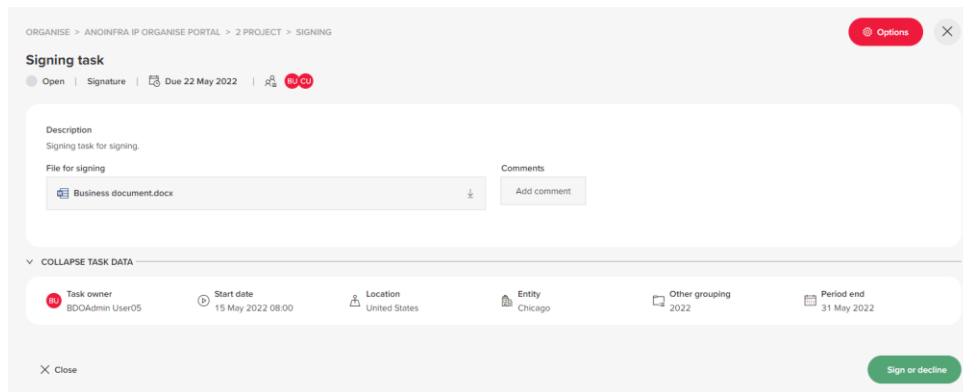
The report is generated in excel with all selected tasks on the same sheet. The report shows how status changed for a certain tasks starting with task creation till report generation date. For each status change there is a separate entry with task information at that point of time.



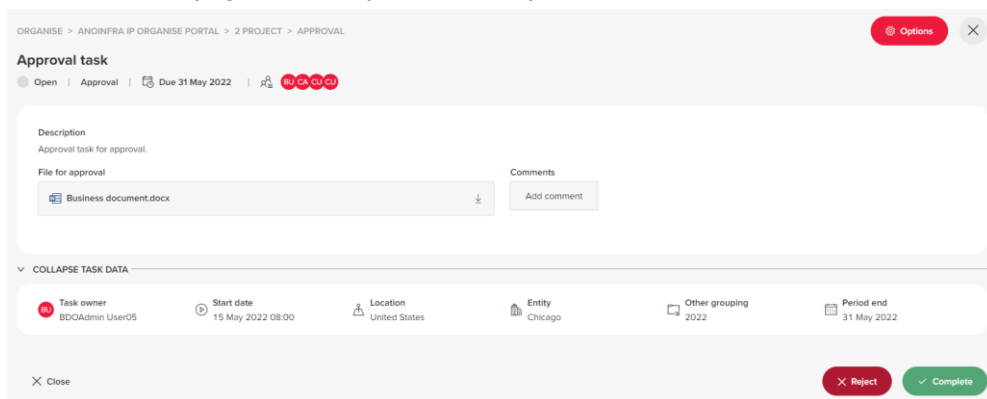
7. DOCUMENTS ACTIONS

7.1 SIGNING AND APPROVAL OVERVIEW PAGE

Choose the project and open created Signing/Approval task. Signing task overview page shows Sign or Decline button.



Approval task overview page shows Reject and Completed buttons.



7.2 READ ONLY/EDITABLE RI 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>
<i>Delivered</i>	<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 NG, 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>

<i>Completed</i>	<i>All files in Uploads and Templates become read only both in Exchange NG, and in Documents page.</i>
<i>Returned</i>	<i>All files in Uploads and Templates in Returned status are editable; Task is also editable.</i>
<i>Overdue</i>	<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 NG 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 NG task (when it is Complete or Delivered). You will not able to create task for any of the file that is in Exchange NG folder. For all other statuses files would be editable.

7.3 STORING RI FILES TO DOCUMENTS

All templates and files uploaded through Exchange NG are saved in Documents page under a particular project. Every Project has a folder named Exchange NG by default 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 NG folders. Folder names cannot be edited from Documents page UI. Exchange NG structure folders (Exchange NG, Task group name, Task name, Templates, Uploads) cannot be deleted from Documents page UI.

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

8. DOCUMENTS

You can upload files or folders to store documents to a Project to later edit and manage them.

8.1 DOCUMENTS STRUCTURE

After opening Documents from the Home page you can see folders/or files of selected Client Portal/Project. Navigate through the folders and if all files don't fit to the screen, a scroll bar appears.

A Document tree on the left side menu of Documents page was developed to mirror the structure of Exchange Next Gen.

Only the Client Portal documents, Projects and inner folders appear. Files are not displayed.

If there are any confidential projects, the mark [Confidential] is displayed next to the project title.

8.2 FILTER DOCUMENTS

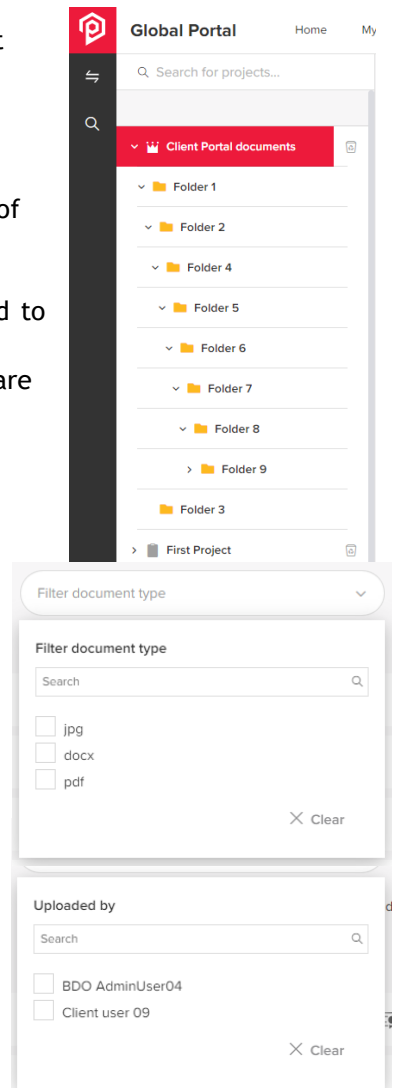
Two filters, Document type and Uploaded by - are displayed on the top of the Documents page.

Both filters have a dropdown with a search field and the checkbox. Only document types added to the selected location are displayed in the filter. Only those users who uploaded files in selected locations are displayed in the filter.

After the document type is selected a number of selected options is displayed next to the filter and the files found according to the selected type are displayed in the main window.

When you set the filters and moves to another project without any files that could be filtered, the icon "No documents found" is displayed.

You can unselect the selected options one by one or click the button [x Clear] in each filter separately or click the button Clear filters and remove all applied filters at once.



9. SEARCH DOCUMENTS

You can search for specific files regardless of where on Portal you are located. Insert the search term to the Search icon. Only files can be searched, folders don't have this ability.

A tooltip "Search files/tasks" is attached, saying:

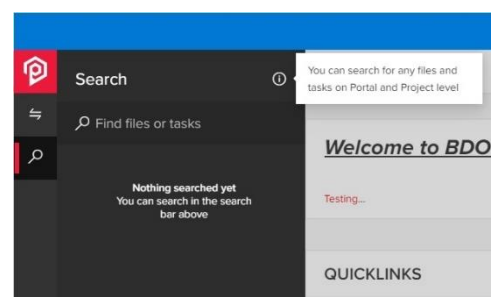
"You can search for any files and tasks on Portal and Project level".

Unless anything is searched, the message *"Nothing searched yet. You can search in the search bar above"* is displayed.

In the search results, the searched file consists of:

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

NOTE: Due to SharePoint limitations it is not possible to search for symbols (except for '\$').

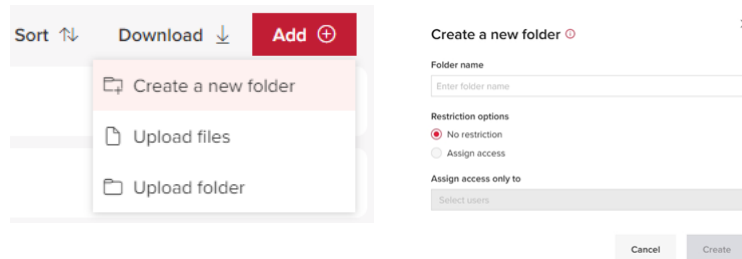


NOTE: The Search field can be somewhat out of sync with the actual Library. As the User sees Files/Tasks directly from the library, for them to appear in the Search field, they need to be indexed by the system after each change. This may take between few minutes - 24 hours.

10. UPLOAD A DOCUMENT

You can upload documents or folders by going to the Documents page, select a Project and click on “Add” -> “Upload files”/”Upload folder” or drag and drop the documents.

You can also create a New Folder in the desired directory to which you can also manage the access straight away.



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

10.1 FILE AND FOLDER VERIFICATION

The maximum file size is 2GB.

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

The 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. If more than 100 characters were entered, a validation message is displayed.

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

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

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

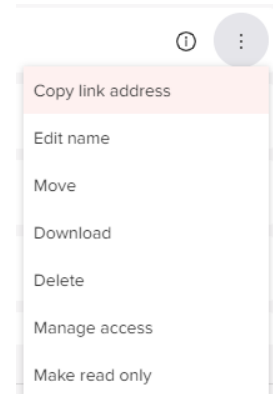
11. EDIT A DOCUMENT

You can open documents online to view or edit them. To do so, click on a document and it will open it in its respective editor (MS word for .docx, Text editor for .txt, etc.). After you start editing the document it will periodically autosave the document. If file type viewing online is not supported, an option to download the file will appear. You can't manage a document while it is open, except for the Download and Copy Link Address. After a document is closed it should be unlocked shortly for managing.

11.1 EDIT SINGLE DOCUMENT

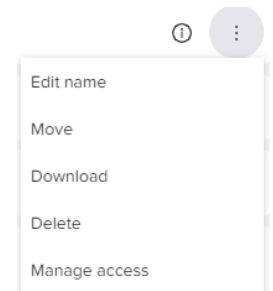
Ways you can manage documents:

- Copy Link Address;
- Move;
- Edit Name;
- Download;
- Delete;
- Manage Access;
- Make/Remove Read-Only;



Ways you can manage folders:

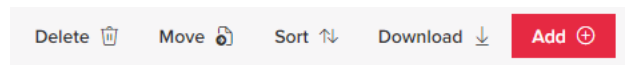
- Edit Name
- Move
- Download
- Delete
- Manage Access



11.2 EDIT MULTIPLE DOCUMENTS

You can select multiple files by one by one, or clicking on “Select All”. Multiselecting documents can be:

- Deleted;
- Moved;
- Sorted;
- Downloaded;



11.2.1 Delete files and folders

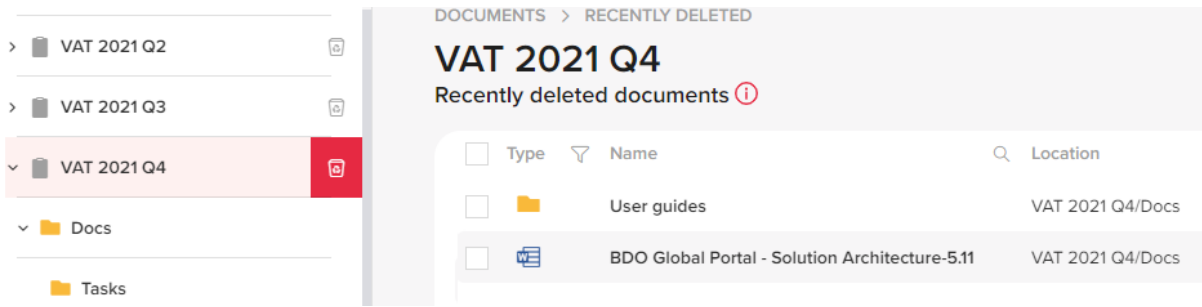
Files and folders in Templates and Uploads folders can be deleted from Documents page UI, if they do not have Read only setting. Deleted files and folders are moved to recycle bin where they reside for 90 days. Files and Folders can be restored to the original directory or permanently deleted.

Files in the recycle bin also have properties:

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

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

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



11.2.2 Move files and folders

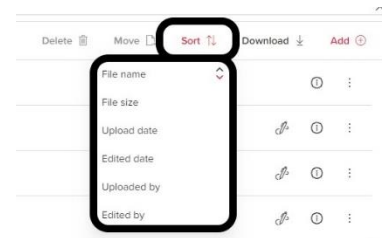
You can move files and folder to a desired directory, in the same Portal/Project, by using the move buttons. This will create a pop-up with a directory tree of the Portal/Project where the document resides. Limitations are that you can't move to a directory where a list of the files is already present.

11.2.3 Sort files and folders

You can sort files and folders by:

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

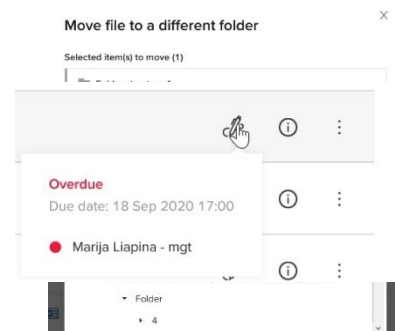
You can sort in Ascending or Descending order.



11.3 DOCUMENTS & TASKS

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

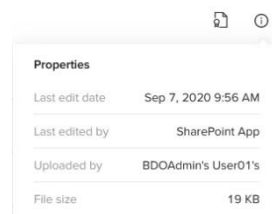
If a task is assigned to them, they will also be able complete it. Documents which are associated with already completed tasks will have a green bar next to them.



12. FILE/FOLDER PROPERTIES

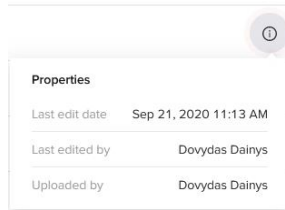
Files have these properties:

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



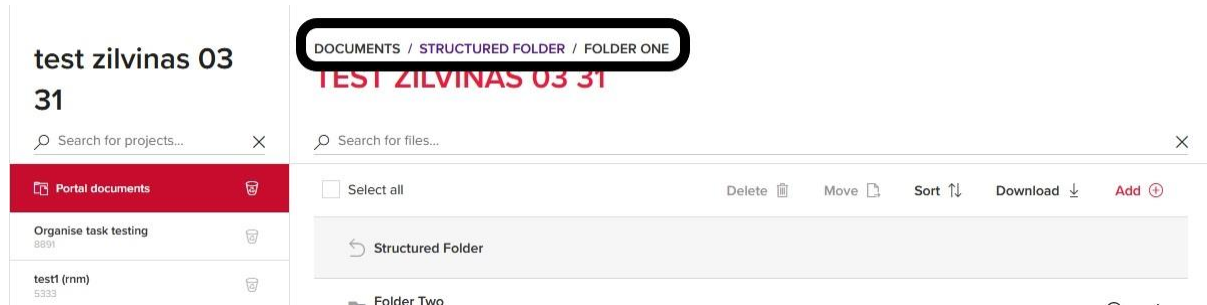
Folders have these properties:

- last edit date
- last edited by
- Uploaded by



12.1 BREADCRUMBS

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



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



13. MANAGE ACCESS TO A DOCUMENT

13.1 READ-ONLY

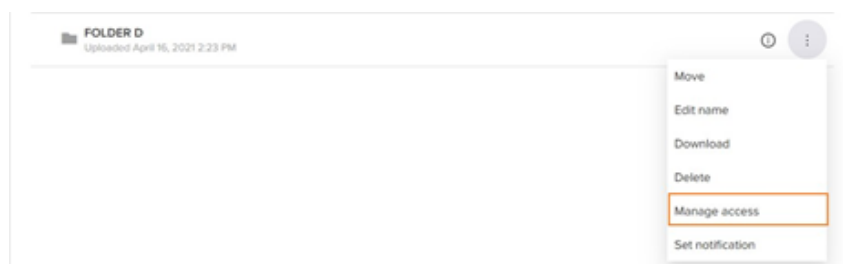
Marking a document as Read-only will make the file only viewable to all users.



13.2 MANAGE ACCESS

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

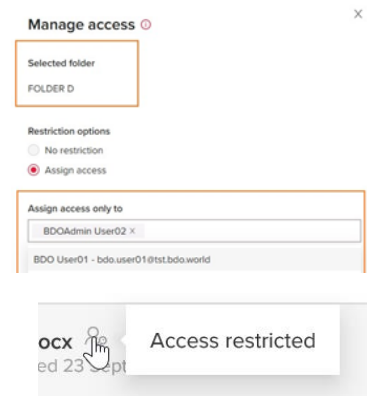
Two types of restricted files and folders can be applied: restricted access applied directly to the file/folder and access inherited from the folder or folders this file/folder is located in.



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