



FAQs BDO Global Portal

We are delighted that you have decided to join us on the BDO Portal. To answer some of the most commonly asked questions relating to the BDO Portal, we have put together this document for your convenience. Please feel free to get in touch with your BDO contact if you have any further questions.

We wish you an informative read!

BDO

About BDO

With over 3,000 employees across 28 different locations, BDO is one of the leading companies for auditing and audit-related services, tax and business law consulting, and advisory services in Germany.

BDO AG Wirtschaftsprüfungsgesellschaft is the founding member of BDO International, which was established in 1963 and employs almost 115,000 members of staff across 166 countries.

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Contents

1	General questions	3
2	User access and user permissions	4
3	Technical basis and architecture	6
4	Questions about data security and data protection	8
5	Questions about data storage and recovery	10
6	Support	11

1 General questions

What is the BDO Portal? What are the benefits?

The BDO Portal is a digital platform designed to facilitate the transfer of information and collaborating on projects. Its purpose is to make our cooperative working environment even more secure.

As auditors and consultants, we often exchange sensitive data with our clients. This poses challenges for us both in terms of data protection and data security. With the BDO Portal, we are offering a safe, efficient tool to make the process of exchanging data more modern and secure for our clients.

Where can I find the BDO Portal?

You can find the BDO Portal by visiting portal.bdo.global. Please note that you will need to be authenticated as a user first (see technical questions below).

What will it cost me to use the BDO Portal?

You will not be charged any additional fees for using the core functions of the BDO Portal. You may incur usage charges or set-up fees for special services or apps made available on the BDO Portal. However, we will notify you of this separately if this is the case.

2 User access and user permissions

How do I access the BDO Portal?

Your BDO contact will set up the portals for you individually based on the specifics of your contract. Generally speaking, the main contact person on your side will be given access to the portal. They will also have the option to grant access to other employees in your company so that they can work on the job on the portal.

How can employees in my organisation access the portal?

The BDO Portal distinguishes between BDO users and client users.

Your administrator will add the email addresses of your employees who are allowed to access to the BDO Portal in the portal. Each employee will then receive an email containing an invitation and a link. After clicking the link, the employee will be required to set a password. They will also receive another email with a single-use code that they must enter on the website.

If your organisation uses Azure Active Directory, your existing accounts can be used to log in to the BDO Portal. Access to the portal is generally user-specific.

You are responsible for assigning permissions within your organisation.

On your side, this responsibility lies with your appointed administrator, who can add additional users and manage access to projects.

What are the differences between the different permissions in the BDO Portal?

As a general rule: Your administrators can access all the projects on your client pages on the BDO Portal. There is also an option to create “confidential projects”. By default, other users without administrator rights will only have read, write and modification rights for the projects they have been invited to collaborate on.

If you require any special instructions, your BDO contact will be more than happy to talk to you about how best to configure your portal pages and projects.

How can I check which users have access in my organisation?

This is within the remit of the “Client Administrator”. Your employees should generally gain access to the portal through their company email address. When employees leave your organisation, you must ensure that the corresponding users are also removed from the BDO Portal.

Does Single Sign On (SSO) work on Office 365?

SSO will work if you are logged onto your computer with a Microsoft Azure Active Directory (AD) account.

Is there an option to enable Multi-Factor Authentication (MFA) for the BDO Portal?

If you use Microsoft Azure AD for user authentication and Multi-factor Authentication (MFA) has been set up in your organisation, this will also be applied to the BDO Portal. MFA is not yet enabled on the BDO Portal. We will activate MFA at a later stage.

To what extent will third parties outside BDO be able to access the BDO Portal?

Third parties will only gain access to your data on the BDO Portal by consultation with us, and only for maintenance purposes. Confidentiality agreements based on the legal requirements of Section 50a of the German Public Accountants Ordinance (WPO) and data processing agreements pursuant to Article 28 of the General Data Protection Regulation have been concluded with these third parties. Standard EU contractual clauses have also been agreed upon where necessary. BDO Global IT or members of the international BDO network appointed by BDO may also gain access to the portal for these purposes in addition to BDO Germany.

3 Technical basis and architecture

Which technology is used for the BDO Portal?

The BDO Portal system comprises the following key components:

- ▶ Microsoft Azure Cloud for user management
- ▶ Microsoft SharePoint Online for authorisation management
- ▶ Microsoft SharePoint Online for displaying and storing data

These components are integrated into the Microsoft Azure Cloud environment. This Microsoft Azure Cloud is located in the European cloud region. All data is stored in this region (North Europe: Ireland, West Europe: Netherlands).

The standard SharePoint view has been adapted to BDO's requirements in order to present a uniform interface for users.

BDO network companies also have the option to incorporate their own developments into the Global Portal.

Do I need a licence for SharePoint or Office 365 to use the BDO Portal?

No. All you need to use the BDO Portal is an internet connection and a web browser. The BDO Portal is based on the Microsoft Office 365 system. The use of web applications by our clients - for instance in the context of sharing Office documents - is also covered by our licence agreement with Microsoft.

What availability do you promise?

The BDO Portal is available 24 hours a day from Sunday to Friday, and for 18 hours a day on Saturday. Please note that we set aside a six-hour window for maintenance every Saturday.

Which web browsers are supported by the system?

The BDO Portal supports the following web browsers:

- ▶ Microsoft Edge
- ▶ Google Chrome
- ▶ Mozilla Firefox

We always recommend using the latest version of the browsers listed above. If possible, you should avoid using Version 11 or older versions of Microsoft Internet Explorer.

We are currently preparing to offer access to the portal on mobile devices.

What kind of connection is required?

All that is needed to use the BDO Portal is an internet connection.

Which file types and maximum file sizes are permitted?

The following **file volumes and sizes** are allowed:

- ▶ Uploads of 30 files at a time.
- ▶ The maximum file size (either for all files to be uploaded at once or for a single file) is 2 GB.
- ▶ A maximum of 5,000 files can be held in a single folder.
- ▶ A 'site collection' in SharePoint Online (e.g. a project) can have a maximum size of 25 TB.

The following **file types** are currently allowed:

- ▶ .pdf, .jpg, .png, .gif, .zip, .rar, .txt, .doc, .xls, .ppt, .docx, .xlsx, .pptx, .gme, .eml, .msg, .vsd, .vsdx

Please note that we advise against using old MS Office file formats (.doc, .xls, .ppt) as they pose a security risk. We will not accept any responsibility for damages resulting from the use of outdated file formats.

Will an anti-virus scan be performed before documents are uploaded?

Please refer to this [article on virus detection in Office 365/SharePoint Online](#).

4 Questions about data security and data protection

How are data belonging to different BDO firms distinguished from each other?

Every BDO member company and every project on the client portal is created as an independent data room (SharePoint Site Collection).

The respective security rules (access rights) apply at the level of the whole data room. This strict separation of data is supported across all applications and interfaces (Services in the Service (Office 365)).

Do you perform regular vulnerability and penetration tests?

Yes, vulnerability and pen tests are regularly carried out by third parties and the findings of such tests are addressed promptly.

Please note, however, that the tests carried out in the Office 365 environment form part of Microsoft's pen tests and not our own. For information on this subject, consult the following [link](#) from Microsoft.

How often are system vulnerability tests performed?

On an ongoing basis. We run daily vulnerability tests and pen tests after making significant changes to the BDO Portal. Microsoft performs ongoing internal pen tests on the Azure platform. Azure is also subjected to annual pen tests by an independent external institution. To find out more about security in data processing with Microsoft Azure Cloud, click the following [link](#).

Which certificates have been obtained for the technology?

The BDO Portal is based on Microsoft Cloud technologies. For more information on certificates, please visit the Microsoft Trust platform. This is where you will find the Microsoft Compliance certificates, which you can also view along-side the corresponding test report via another [Microsoft search site](#).

Furthermore, BDO Global IT is certified according to the international ISO/IEC 27001 standard.

What protection is in place for data transmission?

The transfer of data to the BDO Portal is secured by permanently encrypted connection based on Transport Layer Security (TLS).

Secure algorithms (e. g. AES128) and 2048-bit key lengths are used for encryption. The transmission of data on the portal is based on secure Microsoft Azure Cloud technologies, including TLS, Secure Socket Tunneling Protocol (SSTP) and Internet Protocol Security (IPsec).

How are data protected on the BDO Portal?

All data stored on the BDO Portal are encrypted. Secure Microsoft Azure Cloud methods such as the AES256 algorithm are used for encryption purposes.

How are the keys managed?

Microsoft (online) manages the keys and the SSL certificates for Office 365 (SharePoint Online).

Microsoft has also implemented a lockbox feature for Office 365/SharePoint Online, which allows access to (client) data to be controlled if a Microsoft employee has to be deployed for maintenance purposes. See [this link](#) for more details.

Where are the portal data stored?

The BDO Portal is based on the Microsoft Azure Cloud. In the case of BDO Germany, data are held exclusively in the Microsoft EMEA Cloud in the European Union.

Which activities are logged?

The BDO Portal logs include Azure logs and contain, among other things, operational logs (e. g. for the creation of projects or individual data objects on the platform); security and activity logs (e. g. user logins or changes to permissions); data relating to portal performance.

For more details, see [this link](#).

How long is this information stored? Who can access this information?

As a rule, this information will be deleted after 90 days. Anonymous Analytics data may be stored for up to 730 days.

5 Questions about data storage and recovery

What are the rules for back-up and data recovery?

The BDO Portal is designed to facilitate the cooperation between BDO and our clients, hence it does not serve as a means of data storage and documentation. Therefore: Content uploaded to the BDO Portal will remain online until it is deleted. If a project is “removed”, only the access rights will be removed, i. e. the contents will remain online. Any content which is actively deleted will be recoverable for 30 days according to the SLA. Content can be recovered by an administrator for a further 30 days.

How long will accidentally deleted data be stored?

As the BDO Portal is based on SharePoint Online, there is a “recycle bin” where files are kept and can be recovered by your BDO contact for up to 30 days after they have been deleted. The version management function helps to restore the previous version when a file has been deleted.

How long is a data room maintained, or what happens when a contract is ended?

Upon the termination of a contract, the statutory retention periods apply to the deletion of data used in the BDO Portal unless otherwise agreed in exceptional cases. Documents will also continue to be available after a BDO Portal/project has been deleted as they form a component of a contract.

6 Support

Where should I go for support when using the BDO Portal?

If you have any questions or problems when using the BDO Portal, please get in touch with your BDO contact. We will then deal with your concern.

The BDO Portal is an open development environment that we are gradually working on expanding. Your BDO contact will be happy to hear your suggestions and requests.