Review Process for End Users in CodySoft®'s Collateral Management Module®

Contents
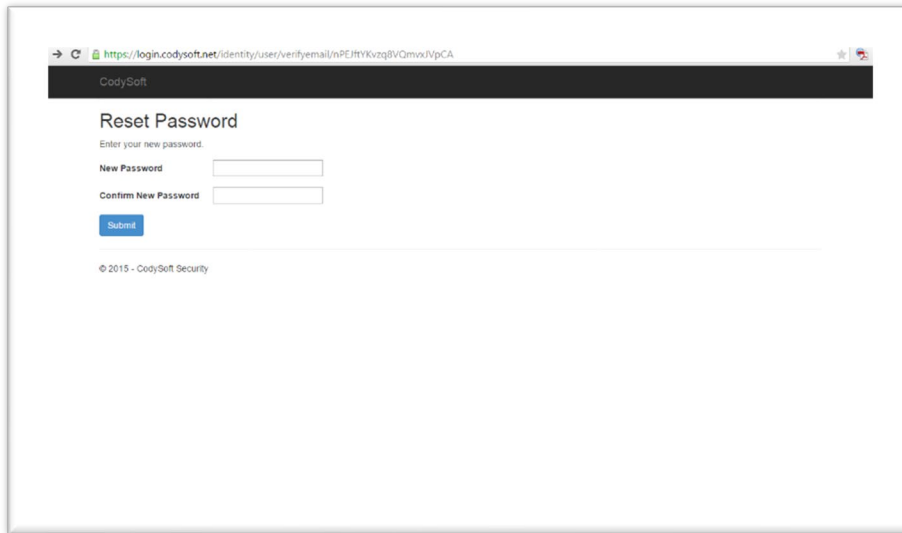
Logging in for the first time:

CodySoft® sends you a confirmation email when you are first added to the list of registered users at the start of a project.

1. From the confirmation email, click the first link. The Reset Password page displays, where you will establish your password.
    NOTE: Clicking the second link in the email will cancel the request, and you will not have access to CodySoft®.

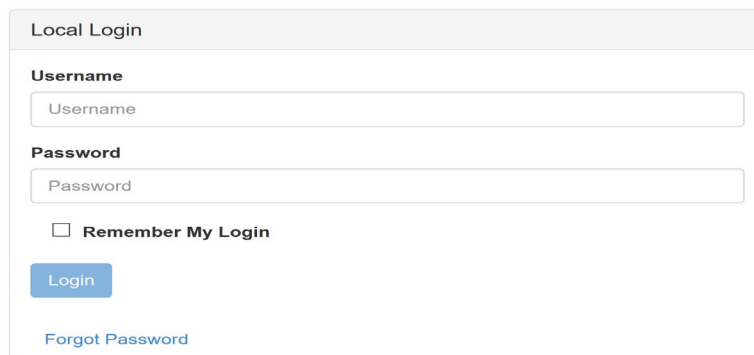2. In the New Password field, enter a **new password**
3. In the Confirm New Password field, enter the **new password** again.
4. Click **Submit.**
5. You will then be brought to the main login page, where you will be able to login for the first time. Please remember that your user name is your email address to which we sent the welcome email.
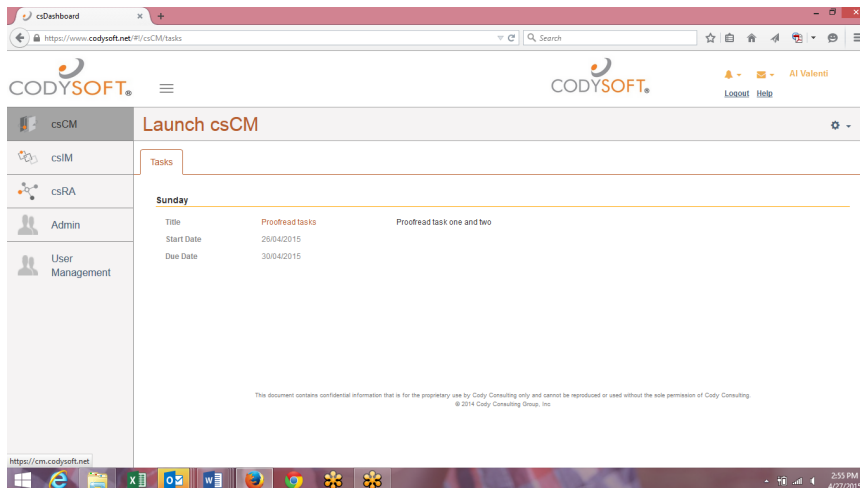

Main Dashboard

The main dashboard is the first screen you see after you log in to CodySoft. It provides you with access to the different modules your company has licensed.

The csCM on the menu bar on the left side of the screen is an acronym for is CodySoft®'s Collateral Management Module®. To launch the Collateral Management Module:

1. Click **csCM**. The Launch csCM button appears
2. Click **Launch csCM**.

NOTE: To access Collateral Management directly in the future:

1. Bookmark http://cm.codysoft.net in your web browser.
2. Select the bookmark to go to the login screen
3. Enter your username and password. The Collateral Management Dashboard displays.
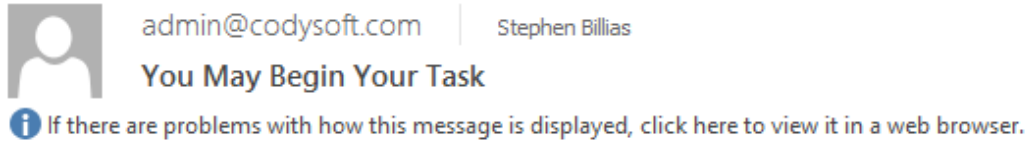
CodySoft Review Process

As an end user, you can respond to review tasks you are assigned, and you can mark up documents using the Markup Tool during Concurrent review, or edit copies of Word documents using Edit File during Routing Review, to indicate where changes are necessary. When you are marking up documents using the Markup Tool, you'll be able to see other users' review comments also. Multiple users can edit the same review document simultaneously.

Accessing your tasks for review

There are several ways you can access your tasks for review:

From the email you receive when you are assigned a task. Here is a sample email:

admin@codysoft.com | Stephen Billias

You May Begin Your Task

ⓘ If there are problems with how this message is displayed, click here to view it in a web browser.

CollateralManagement
module ®

Request Details:	
Project Name:	Stephen B Review Project
Project #:	309

The following task has been assigned to you (see below) and you may begin now.

Task:	Template Review Task - Please review HPP MAPD EOC (Markup Tool)
Description:	You have been assigned a review task.
Start Date:	2016-07-29
Due Date:	2016-08-02

Link to project: Project

1. From the email, click the **Project** link.
2. Log in again if necessary (this step depends on which browser you are using.)
3. Click the link in the email again if you were required to log in

The document opens, ready for editing.

You can also get to your tasks after you log in from the Review tab in the project in which you were assigned a task:

1. Open a Project
2. Click the Review tab. Your tasks for review are listed:

Review Tasks

3. In the Edit Method column, click the Markup Tool if a Concurrent review (or click Edit File if a Routing review) to open the file for editing

You can also get to a task after you log in from the Notifications icon at the top right of the main CodySoft screen.

1. Click the "You May Begin Your Task" message to open the task email
2. Click the Project link to access the document for editing.

Marking up documents with the Markup Tool

The PDF Markup tool is an easy-to-use editor that provides document reviewers with a simple interface to make edits:
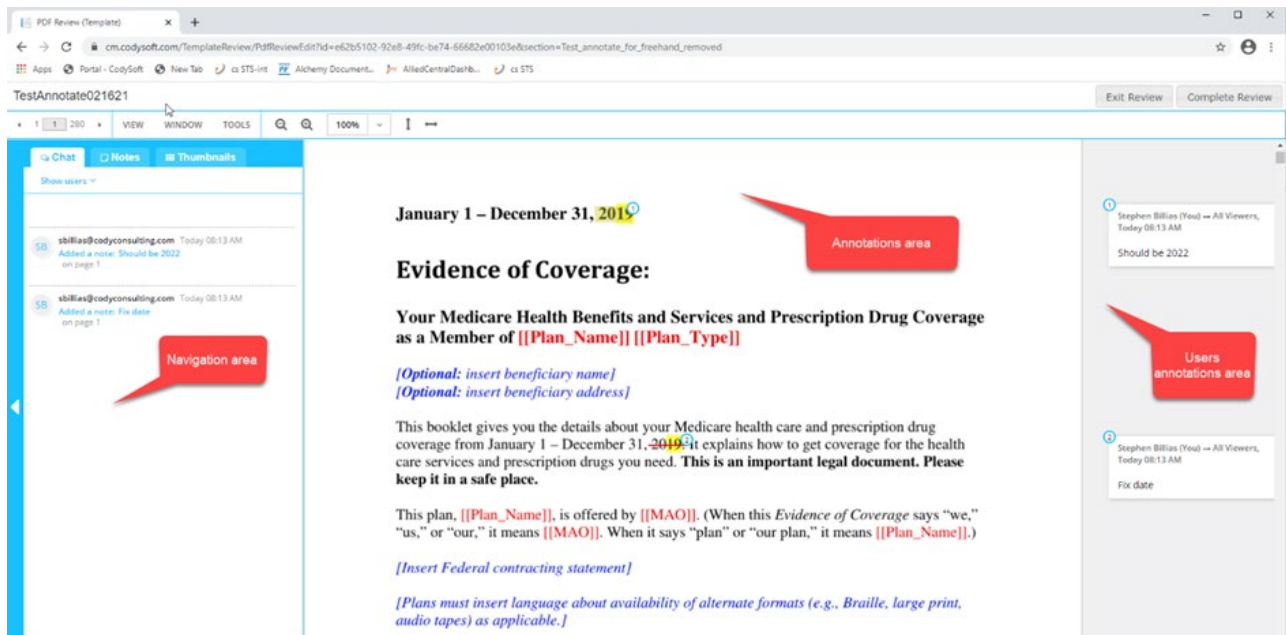
The screen is divided into three main areas:

- **Annotations area** – The center area where you add annotations

- **Users Annotations section** – On the right, where all annotations made to the document are listed.

- **Navigation area** – On the left, available by clicking the arrow to expand it, where you can navigate through the document, filter the annotations, chat with other reviewers, and export your annotations.

Annotations Area

Adding an edit or comment is as easy as clicking in the annotations area.

1. Click, or click and drag to identify a section where you want to make an annotation. As soon as you click, the annotations dialog box displays:


2. Click the HIGHLIGHT dropdown to change the annotation type. The dropdown list displays the choices for annotation type:

   - **Highlight**—marks the text with highlight

   - **Underline**—marks the text as underlined

   - **Insert**—allows you to insert text in the annotation

   - **Strikethrough**—marks the text as strikethrough

   - **Edit**—copies the selected text into the annotation for editing

   - **Mark section**—to mark an entire section for annotation.

3. Enter text in the text box that describes the annotation, for example "Check plan types" or "Update contract year."

4. Click the TO dropdown in the upper left of the dialog box to select whether to make the annotation visible just for yourself or for all users assigned to the review.
   Optionally select one of the tags to enable you and other reviewers to narrow the annotations to a subset, for example, Benefits questions. Your system administrator sets up the appropriate tags for your use. Highlight color is based on the tag type:

   o Benefits in purple

   o Comments in red

   o Questions in green

5. Click **Save** to save your annotation or click Cancel to cancel your annotation.

The tool uses your last selection of annotation type for the next annotation. You can change the type when you make the next annotation.
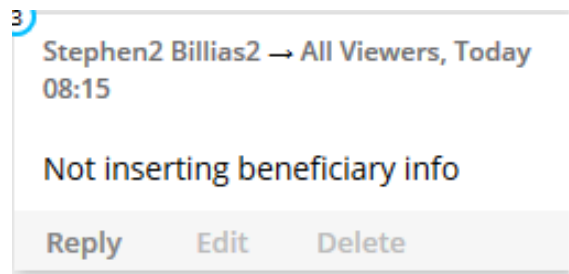
Users Annotations Area

The Users Annotations area keeps track of your annotations and those of others:
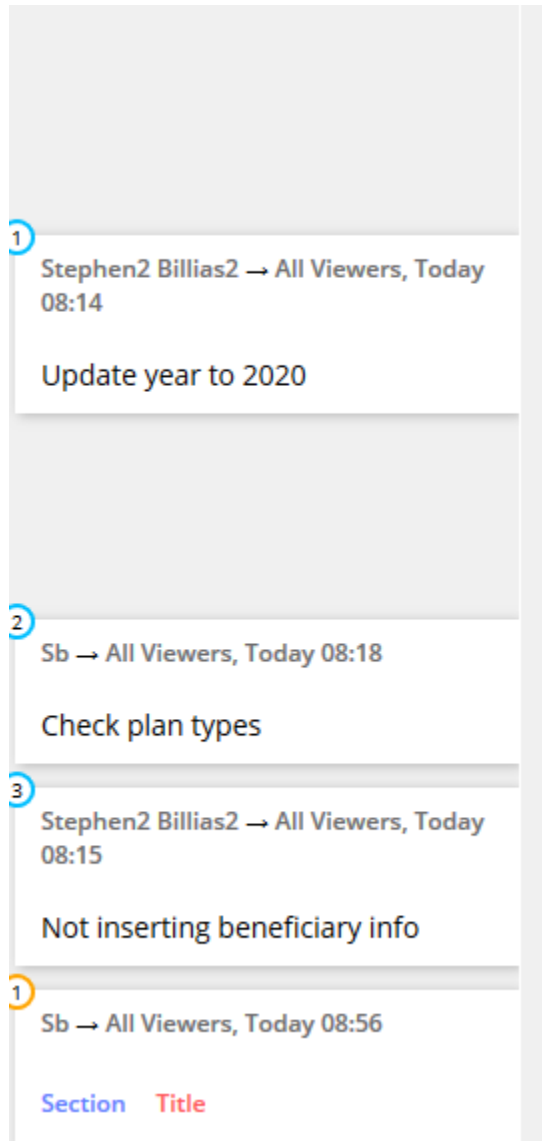
If more than one person is reviewing the same document, their annotations appear in real time while you are in the review.

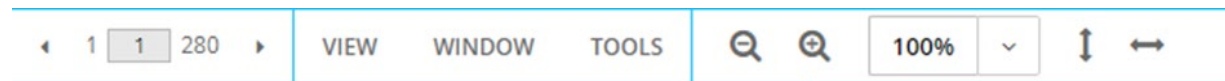You can reply (add a comment) to an existing annotation in the document, and edit an annotation you have made:

NOTE: You can only delete annotations you have made, not the annotations of others.

Navigation area

Navigation

The Navigation area provides many tools for working in the review:

In the upper left of the Navigation area you can page through the file using the left and right arrows or enter a page number to jump to that page. Several menu choices provide additional functionality.

View menu

From the View menu you can choose where to show the Notes, or to hide them, and you can also access a view of all pages as thumbnails for navigation purposes.
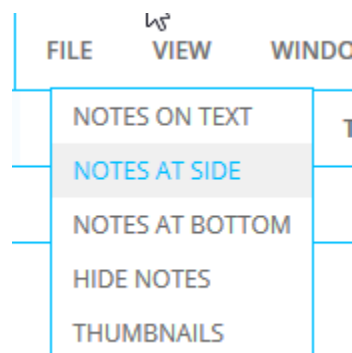
Window menu

From the Window menu you can change your view of the annotations by zooming in or out or setting the view to fit the width or the page size or rotate the page view.

WINDOW

ZOOM IN

ZOOM OUT

FIT WIDTH

FIT PAGE

ROTATE PAGE
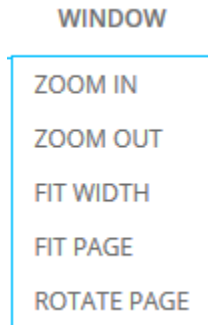
Tools menu

From the Tools menu you can use the Find functionality to search the document, locate Word bookmarks, or bring in material from the Clipboard.

TOOLS

FIND

BOOKMARKS

CLIPBOARD
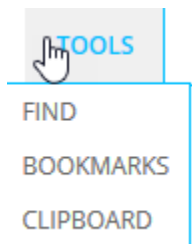
Chat

The Chat choice enables you to chat with other users who are on the review. This feature is useful for real time conversation about a document. Chats are not saved in the Markup tool.
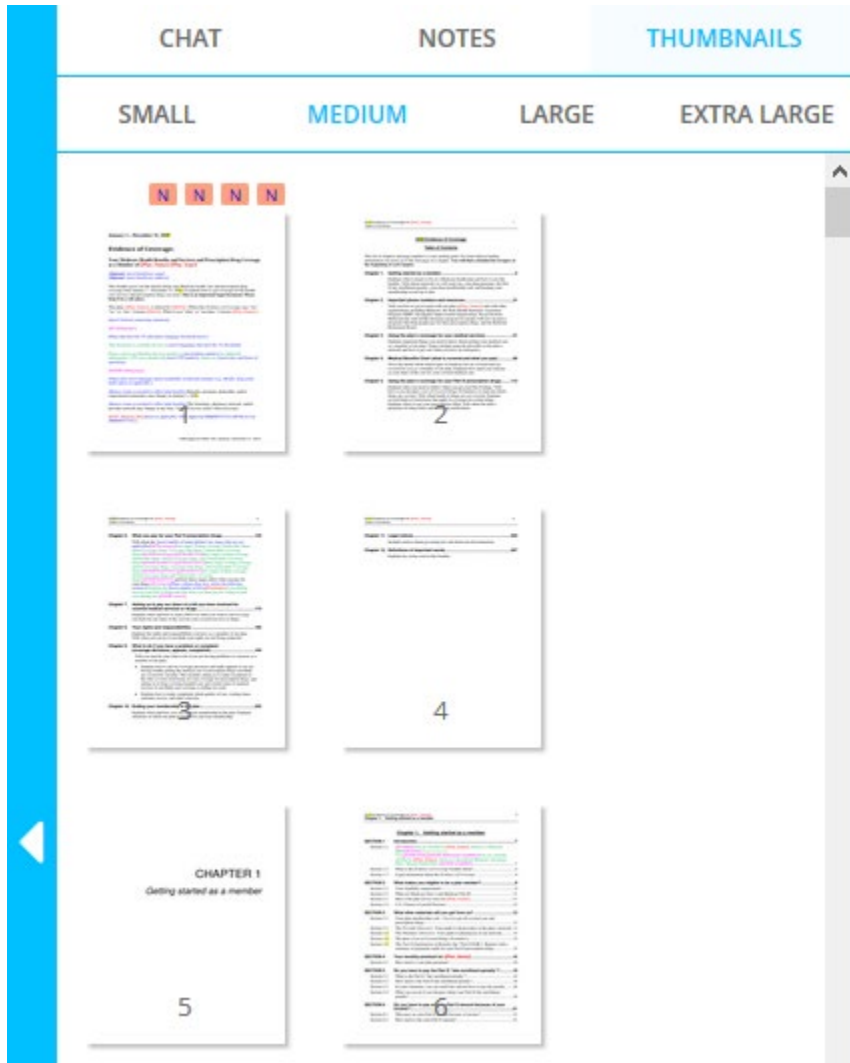
Notes

The Notes choice gives you the opportunity to Filter the list of annotations by date, by tags, and by authors of annotations. You can find notes using a search bar and group the notes by various elements also.

Thumbnails

The Thumbnails choice allows you to view the pages of the document as thumbnails in a variety of sizes. Click any thumbnail to go to that page.
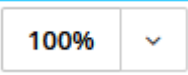

Sizing icons

The review space provides these additional navigation tools:

- The plus or minus looking-glass icons increase or decrease the display of the annotations area.

- The sizing dropdown gives you a set of choices for resizing the annotations area

- The vertical double-arrow positions the entire annotations area vertically as a single page

- The horizontal double-arrow ⟷ positions the entire annotations area horizontally as a single page

Complete review

Click **Exit Review** to leave the review without completing it. All changes you have made during the review session are saved automatically.

When you have made all annotations and added all comments to other reviewers' annotations:

1. Click **Complete Review** to end your review. The Confirm Commit Changes dialog box displays:

Confirm Commit Changes ✖

WARNING!

Once changes have been committed, your review task will be marked as complete, and no further changes will be allowed.

Please enter review task time:
[   ] h [   ] m

[Commit] [Cancel]

2. Enter the time you spent on the review.

3. Click **Commit**.

Your changes are committed to the database and available to the document creator or project manager, and the task is marked as complete automatically.

Click the eye icon 👁 on a completed task to see a PDF of the completed review file with all collated markups or click the .CSV icon 📥 to download a .CSV file of the comments in Excel format

Review Tasks

▼ Tasks - Active Reviews						
Template	**Review Round**	**Name**	**Start Date**	**End Date**	**Edit Method**	
SBTemplate50919	1	Review sample EOC	5/9/2019	5/30/2019	👁🖥	☑

When all reviews in a round of review are complete, it moves to the Completed reviews section.

▼ Tasks - Completed Reviews				
Template	**Review Round**	**Name**	**Start Date**	**End Date**
TestReviewProcess7518-2	1	TestReviewTemplate2Round1070518	7/5/2018	7/5/2018

Click the template name on a completed review to see a PDF of the completed review file with all collated markups.

Editing documents in Edit File

If the review is Routing and the Edit Method is Edit File, click Edit File from the Review tasks section on the Reviews tab page. The document opens in whatever format the document was created. This might be a Microsoft Word file, an Excel spreadsheet, a graphic image, or several other formats. If you are working in Microsoft Word, be sure to turn on Track Changes so that other reviews can see your changes.

NOTE: If more than one reviewer is assigned an Edit File review, the file is locked by the first person who opens it; only one person can edit the file at a time. You'll need to wait until the file is available for editing.

NOTE: You can save your changes in CodySoft and return to a review later to complete it. When you return to the file, you can add, edit, or delete previous changes.

Completing tasks on the Review tab

When you have made your changes and saved the file, you can mark the task as complete:

1. From the projects list, go to the project for which you just completed the task.
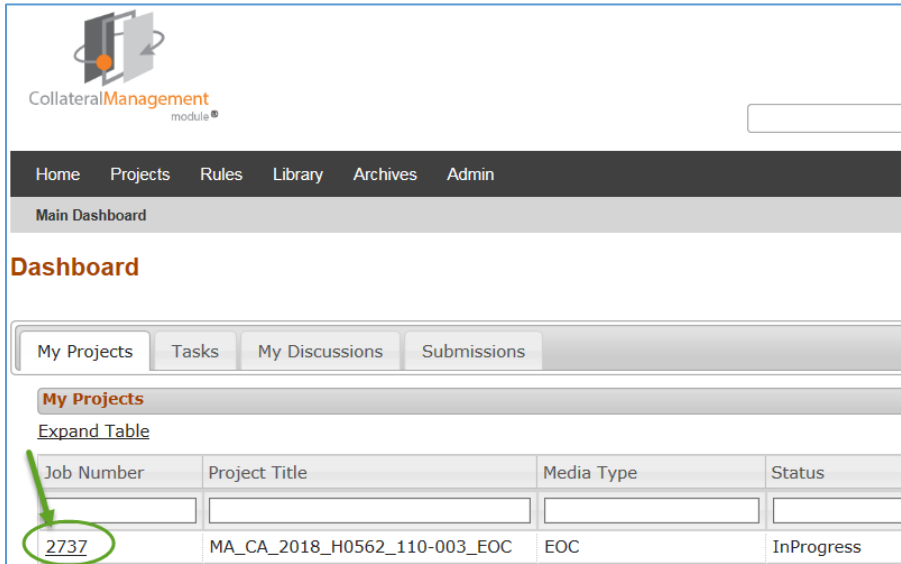
2. In the project, click the Reviews tab
3. From the Reviews tab, locate the task and select the checkbox at the right to mark the task complete.
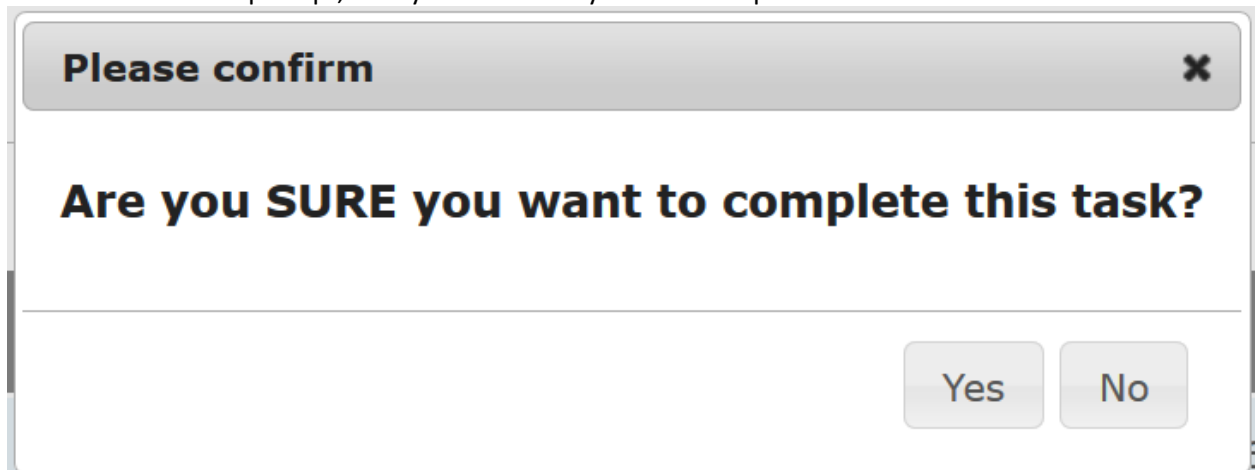

4. At the confirmation prompt, click yes to confirm you have completed the task:

5. Enter the number of hours and minutes it took you to complete the task:

Set Actual Hours   ✖

Hours *

| 1 |

Minutes *

| 0 |

Ok   Cancel

6. Click **Ok**. A red checkmark indicates you have completed the task.
    Review Tasks

▼ Tasks - Active Reviews

Template	Review Round	Name	Start Date	End Date	Edit Method	
Stephen B Test Review	1	Please review HPP MAPD EOC	7/29/2016	8/2/2016		☑