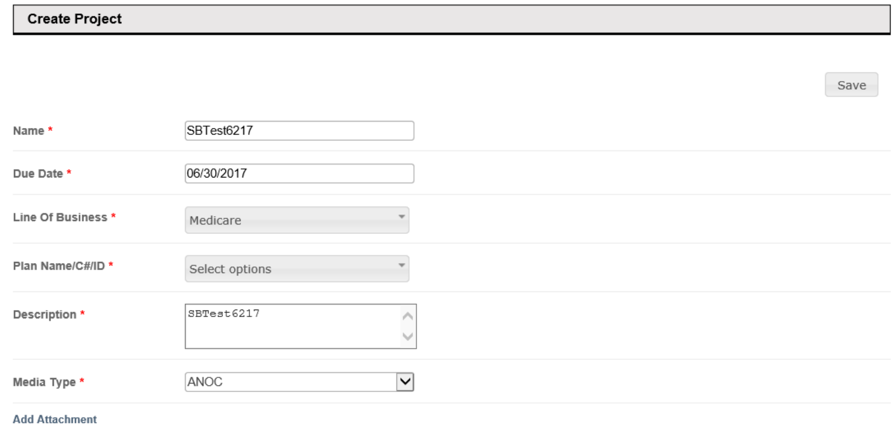
CodySoft Review Process for Project Managers

Contents

Project Form

Use the **Project Form** to create and submit a new project in the Collateral Management Module®. In the form, you can also upload attachments for your project.



Project Form

Project Requestor

The first step in a CodySoft project is for the project initiator to submit a draft project, which must be approved by the Project Manager or Traffic Manager in charge.

Creating and submitting a draft project

1. From the dashboard, click **New Project** link on the right side of **My Projects**.

   NOTE: Items on the form with **red asterisks (*)** are required fields.

2. On the **Create Project** page, enter the following information:
   a. **Name**: Enter a **Name** for the project
   b. **Due Date**: Enter a project Due Date
   c. **Line of business:** from the drop-down list, select the checkboxes for the **lines of business** that apply to this project.
   d. **Plan Name/C#/ID**: From the drop-down list, select the checkboxes for the **contract numbers** that apply to this project.
   e. **Description:** Enter a brief **Description** of the project
   f. **Media Type**: From the drop-down list, select the **Media Type** for this project.

g. Optionally click **Add Attachment** to attach any relevant document that applies to this project
h. Click **Save**
i. If you have Project Manager or Traffic Manager rights as defined in your CodySoft profile, the **Details** tab for the newly created project displays.
    a. Complete all required fields and any optional fields on the **Project Overview, Project Services/Details, Printing and Distribution**, and **Requestor Info** tabs.
    b. Click **Save**.

j. Click **Projects**. Your newly created project appears at the top of the Projects list

You will receive a notification email from CodySoft® that your project request has been submitted for review and approval.

Applying a saved project schedule template to a project record

1. In the **Project Record**, click the **Tasks** tab
2. Click **Edit** to edit the project
3. On the **Tasks** tab, click the **Apply Project Schedule** link.
4. The **Apply Project Schedule** box appears.
5. Select a **project schedule** from the drop-down list.
6. Click **OK**. The project schedule/task list appears in the **Tasks** tab.
7. Click **Save**.

Overview of the Review Process

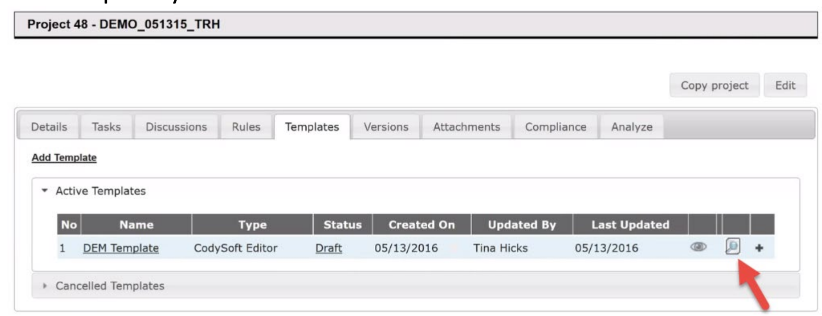
Reviews can take place on both the Template and its draft plan documents, and also on the Versions tab documents created after the template has been approved and versions created. Projects managers monitor the progress of reviews and mark reviews as complete when all reviewers have completed their tasks, or when they want to start another round of review even if some users have not competed their tasks from a previous round of review.

NOTE: You cannot start a review unless the project is in the In Progress state.

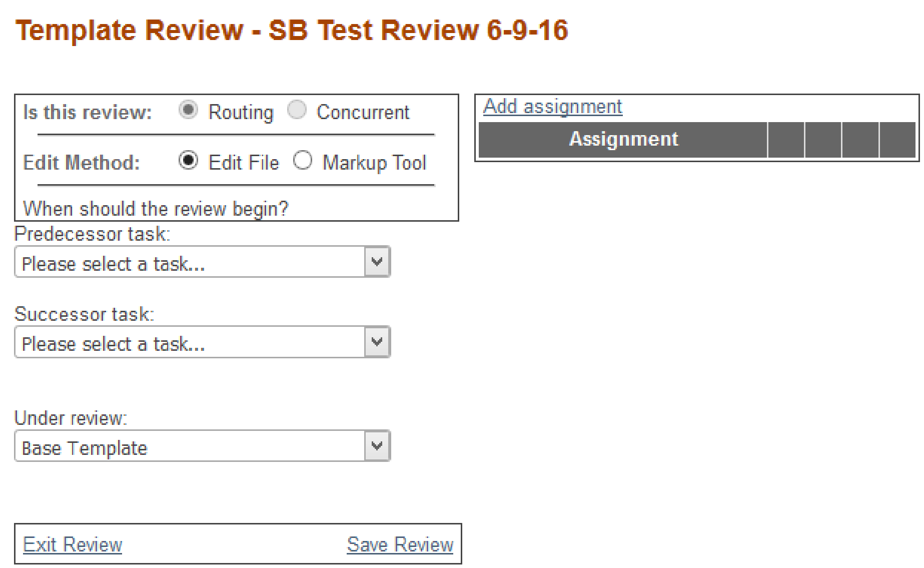
Creating Rounds of Review in the Draft Template

When you are ready to have your project documents reviewed, you create review tasks and assign them to the appropriate reviewers.

1. On the Templates tab, click the Template Review icon on the row for the template you want reviewed:



The Template Review dialog box opens.



2. Enter the following information:
    a. Select whether the review is Routing or Concurrent. If you select

Routing, then each reviewer must review in the order you specify when you Add Assignments. If you select Concurrent, then reviewers you have assigned can review in any order

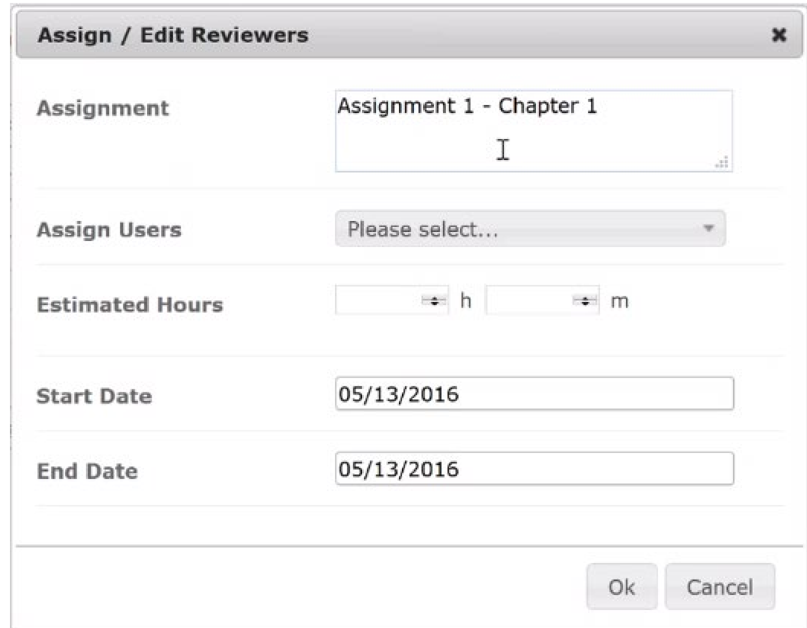
b. Identify the **Edit Method**, either Edit File or Markup tool. The Edit File method opens the file in its original format, such as a Microsoft Word document for editing. **NOTE**: if the document you are editing is a PDF, you can only use the Markup Tool.

c. Enter the **predecessor task** for this review**.** See *Reviews and Schedules*

d. **Enter the successor task** for this review. See *Reviews and Schedules*

e. Identify the document under review. The choices are Base template for review of the CodySoft editor template, or an individual plan from the list of plans in the project.
NOTE: If you select to review a plan, the system does a merge and creates a draft template version of that plan with the rules applied to elements in the template, and data brought into the draft. If you select the review the base template, then the elements and rules appear without any processing.

f. Click **Add Assignment**. The Assign/Edit Reviewers dialog opens.



g. Identify the assignment or assignments for this round of review. This field is limited to 100 characters. Identify which review (for example "Review Round 2" and which plan (for example "H1234-001") is to be reviewed.

h. Assign users by selecting from the dropdown list

i. Enter estimated hours and minutes for how long the review should take to complete

j. Enter a **Start Date** for the review

k. Enter an **End Date** for the review

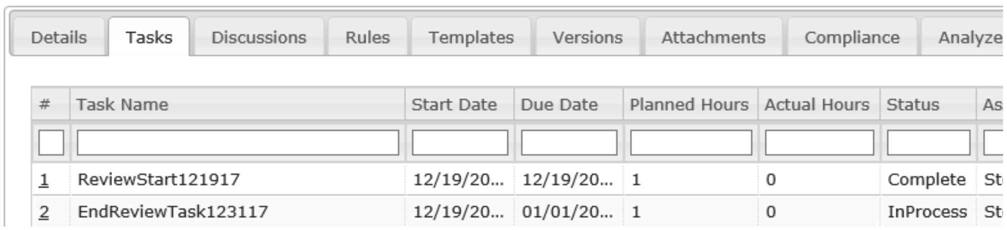
3. Click **OK**. The Template Review page displays again, with the assignments, listed.

If you have selected the Routing review method, then up and down arrows are available to change the order of reviewers. There are also Edit and Delete buttons to edit the task assignment or delete it.

You can Save Project at any time on the Template Review page, and Exit Review at any time also.

Create Start and End Review tasks

On the Tasks tab, create a start review (predecessor) task and end review (successor) task in your task schedule. You need to create both Start and End review bookend tasks.

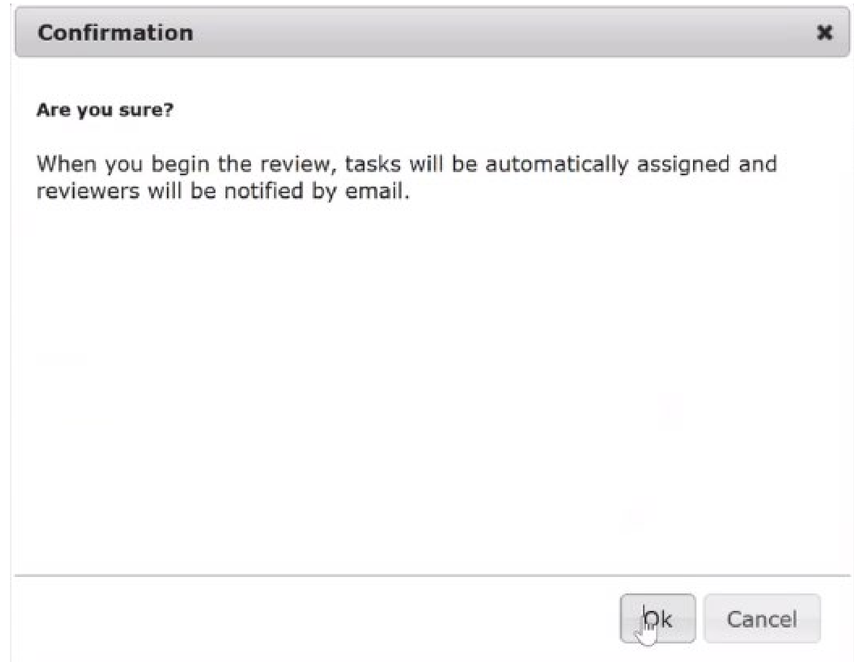


The tasks should have these characteristics:

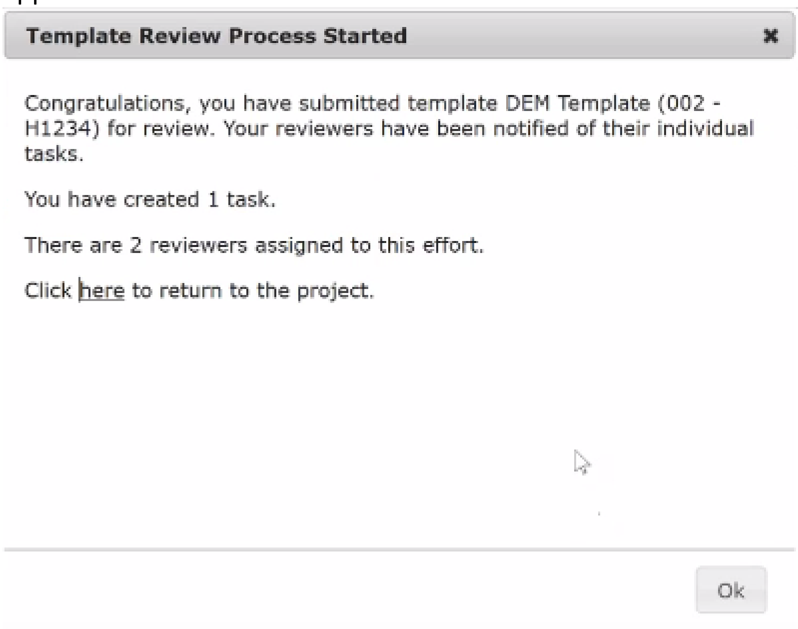
- Name the tasks appropriately to identify what is to be reviewed. For example, a task name might be *Start Review Plan 003* if that's the only plan you're reviewing in this review. It's also helpful to distinguish between template and version review tasks in the task's names.
- You can add dependencies to In Process Successor tasks. In other words, you can specify that the Successor task can't be completed until the review tasks are completed

Starting the Template Review

1. When you are satisfied with the review specifics, click **Begin Review**. A confirmation dialog asked you to confirm that you want to begin the review.



2. Click **OK**. The **Template Review Process Started** information dialog appears.



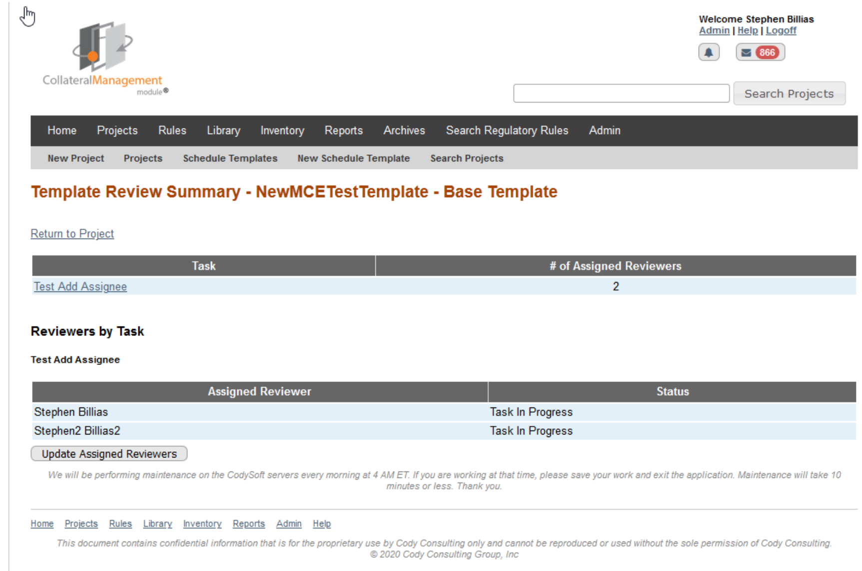
3. Click **OK** to stay on the Template Review page or click the underlined <u>here</u> link in the dialog box to return to the project

Once this review begins, you can no longer add assignments to this review.

Add or Remove Reviewers while in Review

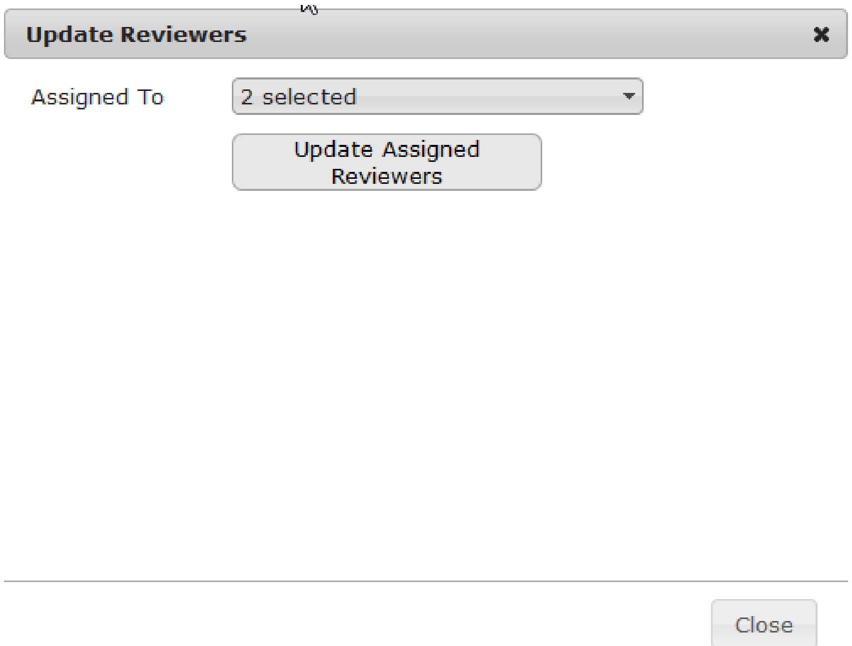
You can add or remove reviewers on an item already in review.

1. From the Template Review Summary screen, click **Update Assigned Reviewers**:



2. On the Update Reviewers dialog, use the dropdown list to add or remove reviewers for this review.

3. When you have made your changes, click Update Assigned Reviewers. The assignee list is updated on the Template Review Summary screen.

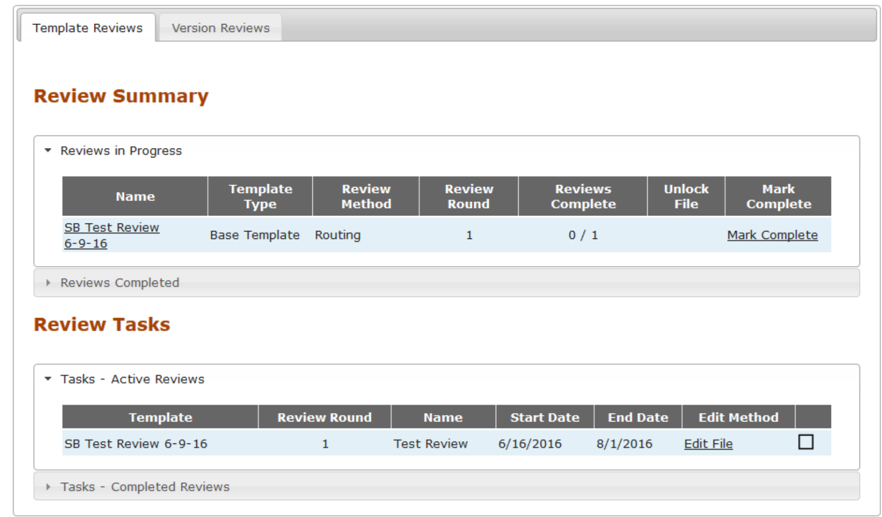


NOTE: Click **Close** to exit the dialog box without making any changes. Also note that you cannot add remove a reviewer who has been assigned to a task and has completed that work. Their name will be greyed out in the Assigned To dropdown list.

Monitoring Reviews on the Reviews Tab

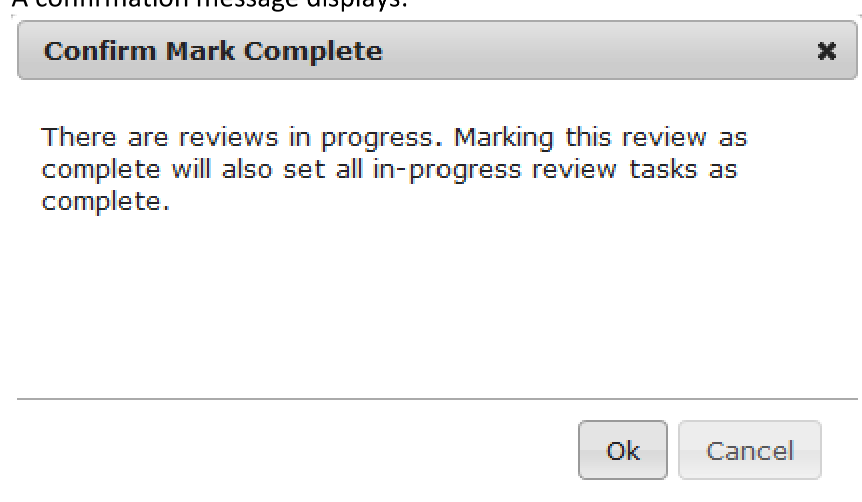
Use the Reviews tab to monitor review activity for both Template reviews and Version reviews.

1. From the Projects page, click the Reviews tab
2. Click either the Template reviews or the Version reviews tab to see the review activity for those stages of review.



The Review Summary Section displays for the owner that initiated the review. The Review Tasks sections displays for reviewers assigned to the review. The Review Summary section shows Reviews in Progress and Reviews Completed

3. Click **Mark Complete** to mark a review as complete.
   A confirmation message displays:



Mark Complete completes every open task with 100% progress but keeps the actual hours at 0 hours so that the user knows which tasks were auto-closed. Mark a review as complete when the review is over or when an additional review needs to replace the first review prior to the completion of that review

The Review Tasks section displays reviews assigned to you.

You can mark a task as complete by selecting the checkbox at the end of the row for that task.

You can also go to the Tasks tab to see all Template review tasks assigned for this project.

Reviews and Schedules

The review process interacts with the task scheduler to keep the task schedule updated with the added reviews.

Certain rules apply:

- You need to have a start review task and end review task in your task schedule in order to create a review. These tasks are needed in the task schedule in order to have a predecessor and successor tasks for the review.
- A reviewer must close out their own tasks during the review.
- Any task that is a predecessor or successor should be named appropriately and relate to what is to be reviewed. For example, be sure to name tasks correctly to distinguish between template and version review tasks.
- You can add dependencies to In Process Successor tasks.
- The system will close out the predecessor task and will handle the dependencies on any tasks and successors. The predecessor and successor tasks are assigned to the same project manager that created the review. The system will close out the predecessor task but it is up to the project manager to close the successor task for each round and create a new successor task for each new review round so that the schedule continues to track correctly through the calendar dates.
- The calendar feature in review task creation does not allow you to choose an end date that's beyond the due date of the successor task. Your task end date cannot exceed the due date of your selected successor task. You can adjust the schedule to accommodate this situation.
- Make sure your review tasks names are unique so that you can identify them easily
- If you are the project manager, you need to keep track of the sum of assigned hours in a routed review or the sum of hours in a single task in a concurrent review. These hours must not cause the task to exceed the successor's due date, or you will not be able to continue with the task creation.
- When you click Begin Review to start a review, the chosen predecessor task automatically completes to 100% and all subsequent review tasks have a start date based on whether the review was routed or concurrent. Assigned reviewers are notified automatically when it is their turn to perform a review. When they complete a review are done, they close out their review task in the Task Schedule.
- Once all review tasks are complete, or when you need to replace the first round of review with another regardless of whether previous reviews were completed, click Mark Complete on the review summary screen to close out any open tasks.
- The "End Round X and Begin Round X+1" task is created automatically by the system when you mark a previous round of review as complete. It populates with the appropriate dependency based on the last review task assignment from the review that was just closed. For example, if you close out Round 1, the auto-added task reads "End Round 1, Begin Round 2". The start and end date of the new task default to the date you mark the review as complete. This gives you a new predecessor task if you want to do another round of review. If you are not doing any more rounds of review, then you can simply rename this task and close it.
- The auto-created "End Round X and Begin Round X+1" task becomes the dependency for the already existing successor task for the next

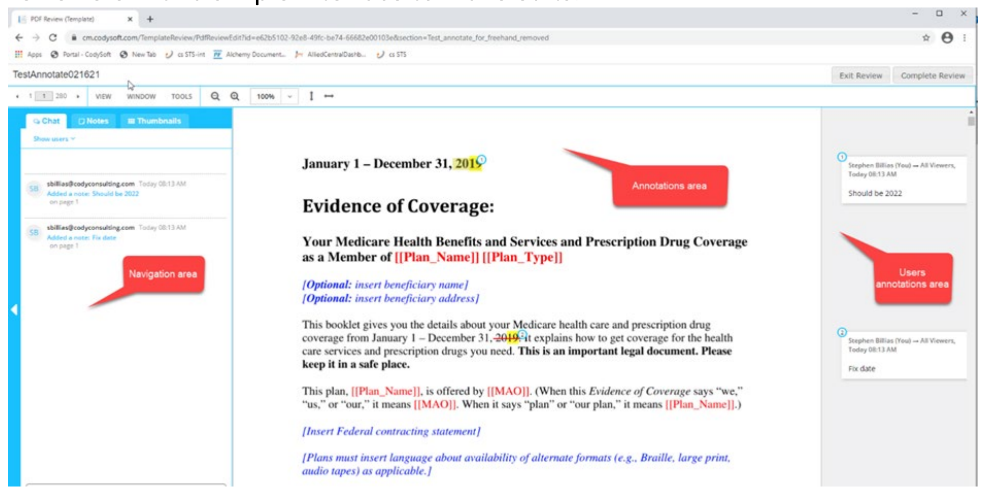
round of review. This creates the necessary beginning and end task date boundaries for rounds of review within a project, to keep the schedule dates in line during multiple rounds of review. When a round of review is marked as complete, the schedule has a new predecessor and same successor to use for the next round of review. That successor task that is created at the beginning remains and is always updated automatically using dependencies. A project manager always chooses a new predecessor that the system auto-creates for each additional round of review, and continues to choose and use the same successor task because the system auto-updates the successor's dependencies to keep it pending as the last task in the review.

To summarize, if you have a project with prior review(s), and you need a new review:

- Do you have an End Round *X*, Begin Round *X+1* bookend from a prior review?
  - If No, verify the prior round was Marked Complete.
  - If Yes, no need to create new Start bookend. Use the End Round *X*, Begin Round *X+1* bookend from a prior review
- Are the End Review bookend dates (start and end) greater than or equal to today's date?
  - If Yes, no need to create new End Bookend
  - If No, you will need to create a new End Bookend task
- If you have more Reviews to send out, but have no Start Bookend task then you will need to create additional start bookend tasks

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:

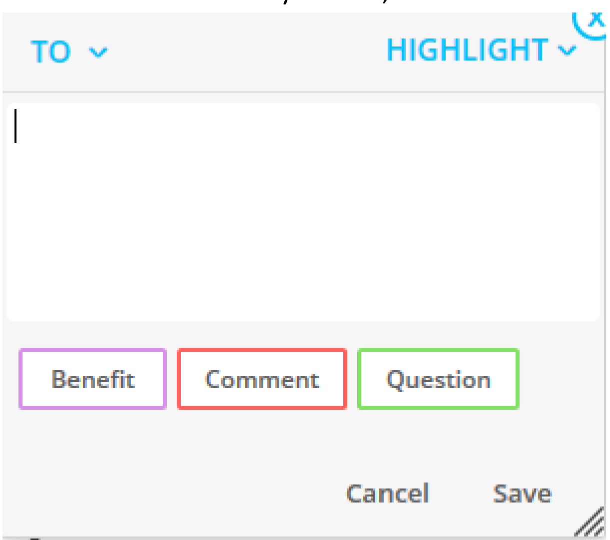
- **Annotations area** – The center area where you add annotations
- **Users Annotations section** – On the right, where all annotations made to the document are listed.
- **Navigation area** – On the left, available by clicking the arrow to expand it, where you can navigate through the document, filter the annotations, chat with other reviewers, and export your annotations.

Collateral Management module®

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:



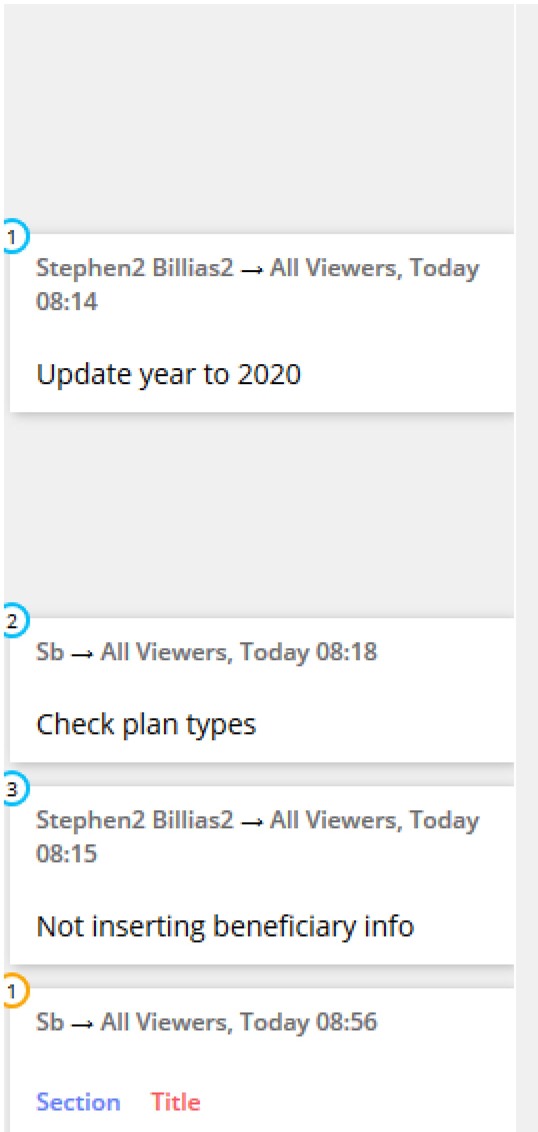
2. Click the HIGHLIGHT dropdown to change the annotation type. The dropdown list displays the choices for annotation type:
   - **Highlight**—marks the text with highlight
   - **Underline**—marks the text as underlined
   - **Insert**—allows you to insert text in the annotation
   - **Strikethrough**—marks 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:
   - Benefits in purple
   - Comments in red
   - 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.

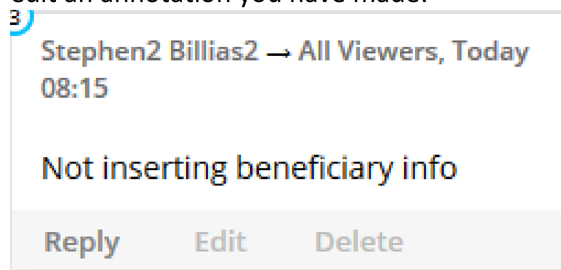
Users Annotations Area

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:

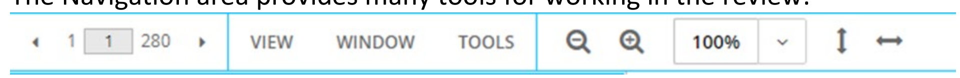


NOTE: You can only delete annotations you have made, not the annotations of others.

Navigation area

Navigation

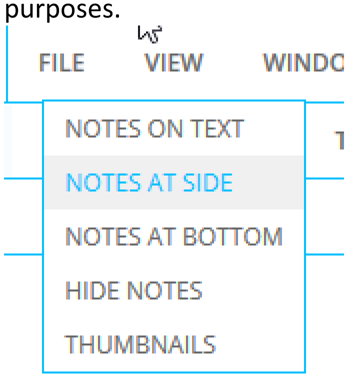
The Navigation area provides many tools for working in the review:



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.

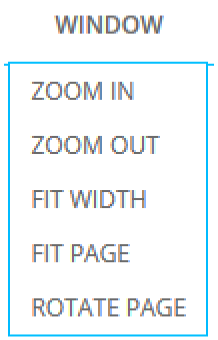
View menu

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.



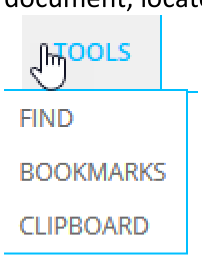
Window menu

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.



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.

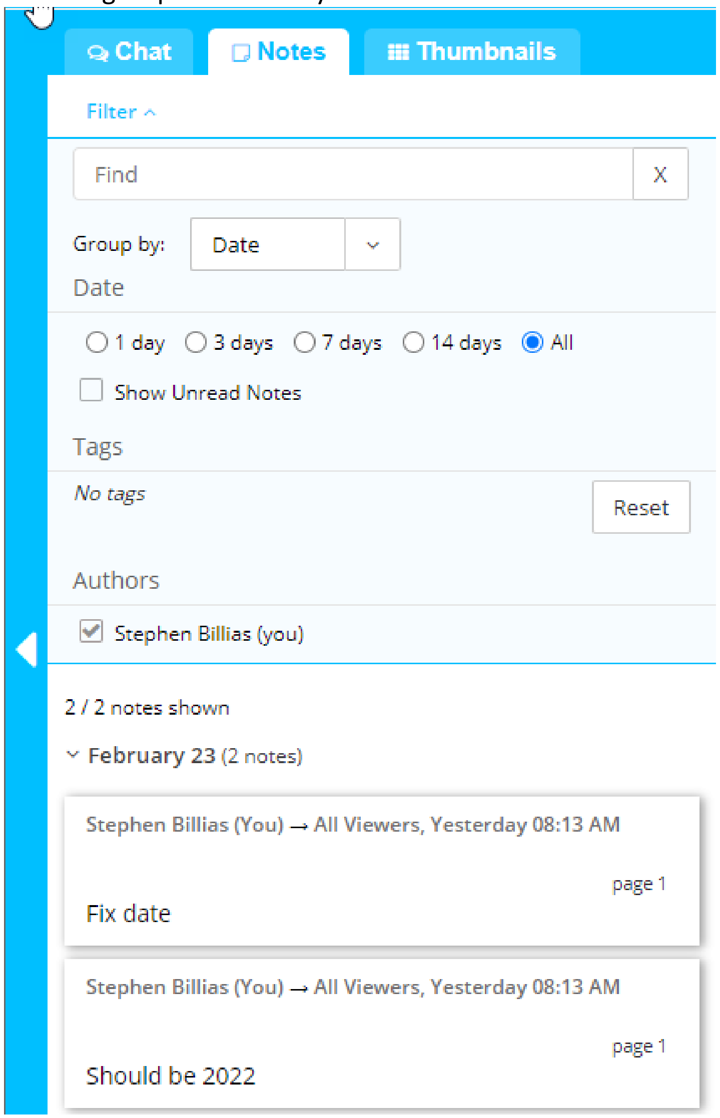


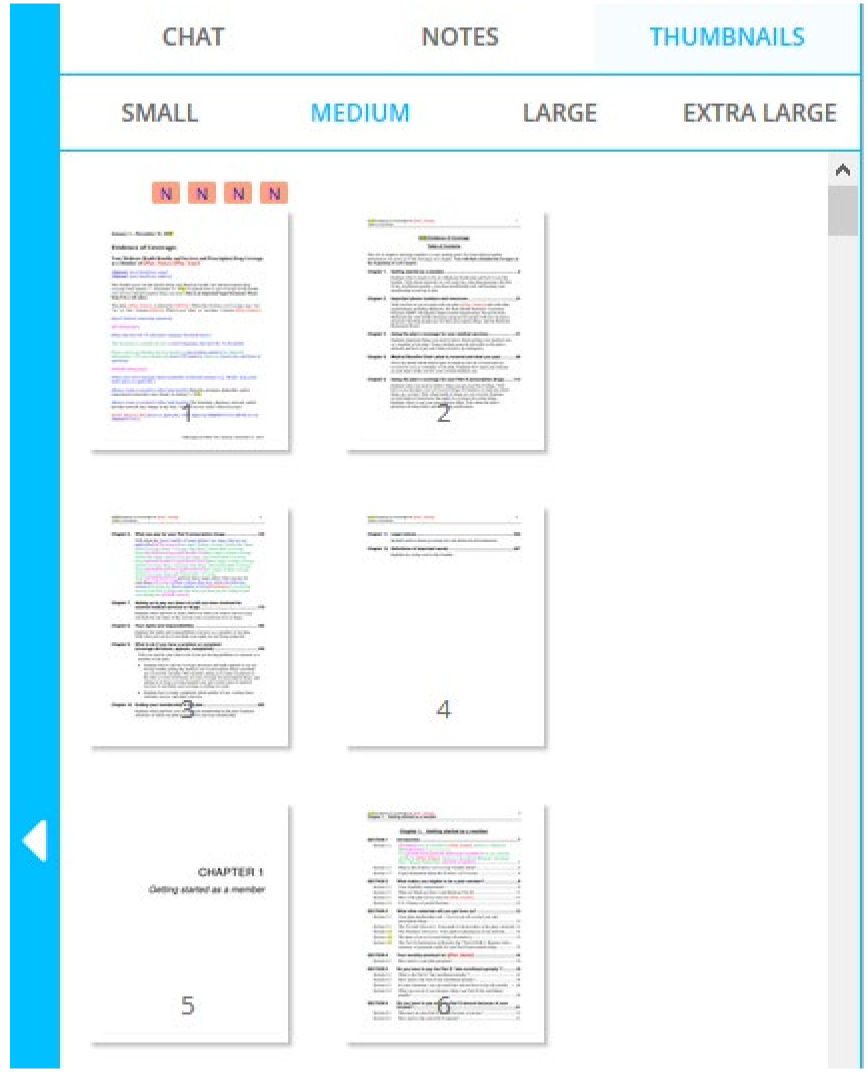
Chat

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.





Sizing icons

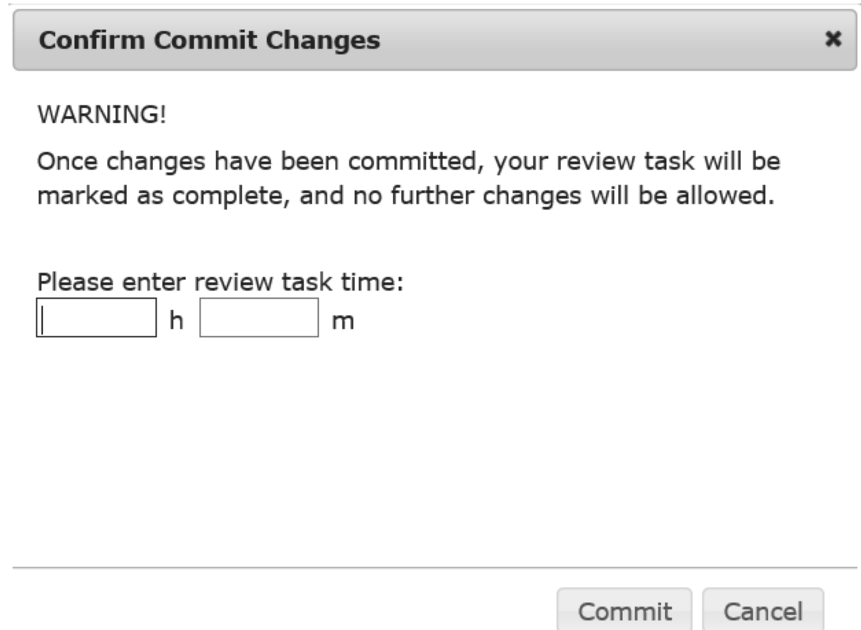
The review space provides these additional navigation tools:

- The plus or minus looking-glass icons increase or decrease the display of the annotations area.
- The sizing dropdown 100% 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:



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.

Tasks - Active Reviews

Template	Review Round	Name	Start Date	End Date	Edit Method	
DEMO DOC	2	2nd review	8/16/2016	8/16/2016	Edit File	
DEMO DOC	1	Initial Review	8/16/2016	8/16/2016		

Tasks - Completed Reviews

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.

Unlocking a file in Edit File

As project manager, you may have to unlock a file occasionally, for example, if someone started to edit a file and then went on vacation without completing the task.

From the Unlock File column on the Review Summary, click **Unlock**.

Review Summary

Reviews in Progress

Name	Template Type	Review Method	Review Round	Reviews Complete	Unlock File	Mark Complete
DEMO DOC	Base Template	Routing	3	0 / 2	Unlock	Mark Complete

Reviews Completed

The file becomes available for review by others.

NOTE: As project manager, be sure to use Unlock File only when you have a valid request or reason to do so. If another user has the file open, and you select Unlock File, the person who has the file open will have to save a local copy of the file.

Reviewing the Review

rom the Template Review Summary page, click on the Review Name to see a summary of the review in progress:

Template Review Summary - SBTemplate50919 - Base Template

Return to Project

Download PDF with applied Markups

Download Notes CSV

Click **Download PDF with applied Markups** to see the marked-up document with all reviewers' markup applied and the reviewer's name below the comments that made.

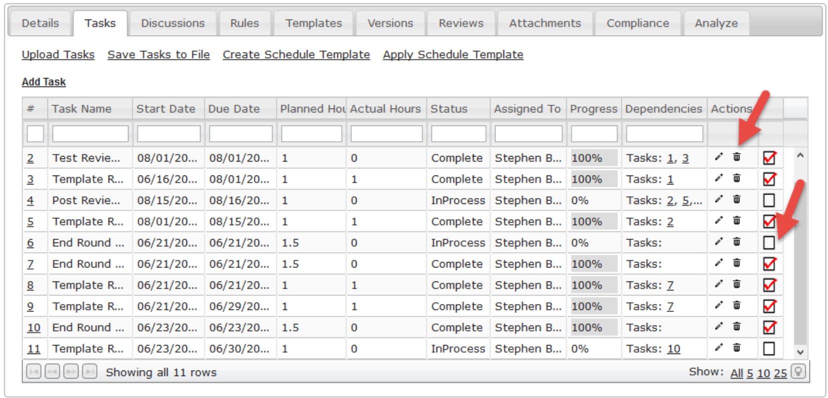
Click **Download Notes CSV** to download a .CSV file of the comments in Excel format.

Closing or canceling tasks

As a project manager, you may encounter circumstances where you want to close or cancel a task that has been assigned. You take these actions on the Tasks tab:

1. Select a project
2. In the project, go to the Tasks tab

3. On the tasks tab, click Edit in the upper right to edit the project. All tasks for the project display:



#	Task Name	Start Date	Due Date	Planned Hou	Actual Hours	Status	Assigned To	Progress	Dependencies	Actions
2	Test Revie...	08/01/20...	08/01/20...	1	0	Complete	Stephen B...	100%	Tasks: 1, 3	
3	Template R...	06/16/20...	08/01/20...	1	1	Complete	Stephen B...	100%	Tasks: 1	
4	Post Revie...	08/15/20...	08/16/20...	1	0	InProcess	Stephen B...	0%	Tasks: 2, 5,...	
5	Template R...	08/01/20...	08/15/20...	1	1	Complete	Stephen B...	100%	Tasks: 2	
6	End Round ...	06/21/20...	06/21/20...	1.5	0	InProcess	Stephen B...	0%	Tasks:	
7	End Round ...	06/21/20...	06/21/20...	1.5	0	Complete	Stephen B...	100%	Tasks:	
8	Template R...	06/21/20...	06/21/20...	1	1	Complete	Stephen B...	100%	Tasks: 7	
9	Template R...	06/21/20...	06/29/20...	1	1	Complete	Stephen B...	100%	Tasks: 7	
10	End Round ...	06/23/20...	06/23/20...	1.5	0	Complete	Stephen B...	100%	Tasks:	
11	Template R...	06/23/20...	06/30/20...	1	0	InProcess	Stephen B...	0%	Tasks: 10	

4. While you are editing the project, you can cancel a review task (the trash can icon) you have assigned or mark it as complete (select the checkbox) on behalf of the reviewer. For example, if you have an employee who has left the project, you may want to cancel that person's tasks.
5. Take one of two actions:
   a. Click the trash can icon to cancel a task

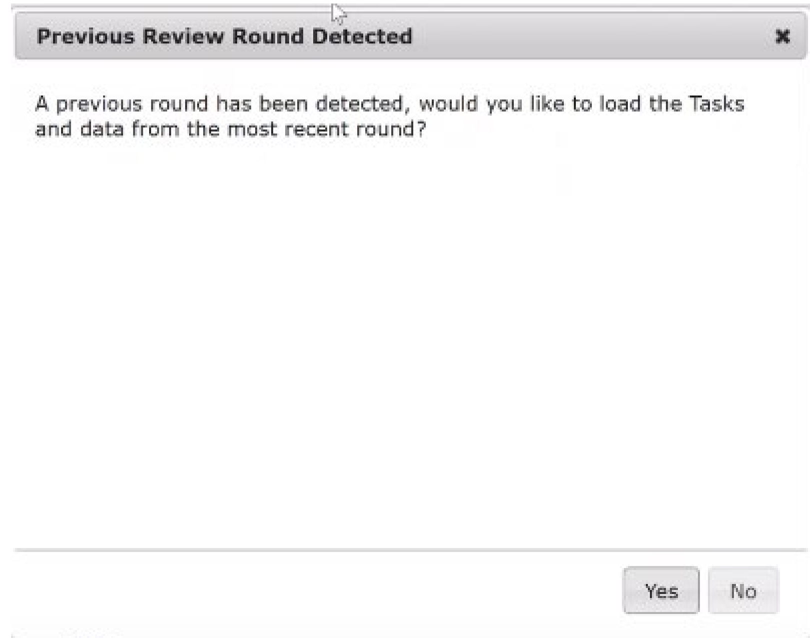
   or

   b. Select the checkbox to complete the task, and follow the steps to enter time spent
6. Click **Save** to save your changes.

Creating another round of review

When all tasks from a previous round of review are marked complete, then the review icon displays again on the template on the Templates tab.

Click the Review icon to start another review. If the system detects that you have done a previous review, the Previous Review Round dialog displays.



This dialog allows you to copy the tasks and assignments from a previous round of review. If you select Yes, the previous review's data is uploaded for the next review. You can then edit that information. If you select No, the Template Review screen displays. During the review creation process, if you want to exit the review screen, you can save the work you've done before exiting by clicking Save Review. When you return to the review screen, there is a Load button on the Template Review screen that allows you to load the work you had saved previously.

There is also a Load button on the Template Review screen if you decide at that point to copy in the previous round's review data.

Complete the Project

After the all the tasks in your project have been completed, change the project status from In Progress to Complete status to archive the project.

1. From the home page, choose the project you want to complete
2. Click **Edit**
3. Change the Status to **Complete**

The project is archived automatically.