CODYSOFT®

Collateral Management module®

User Guide

For use with application release May 23rd, 2022

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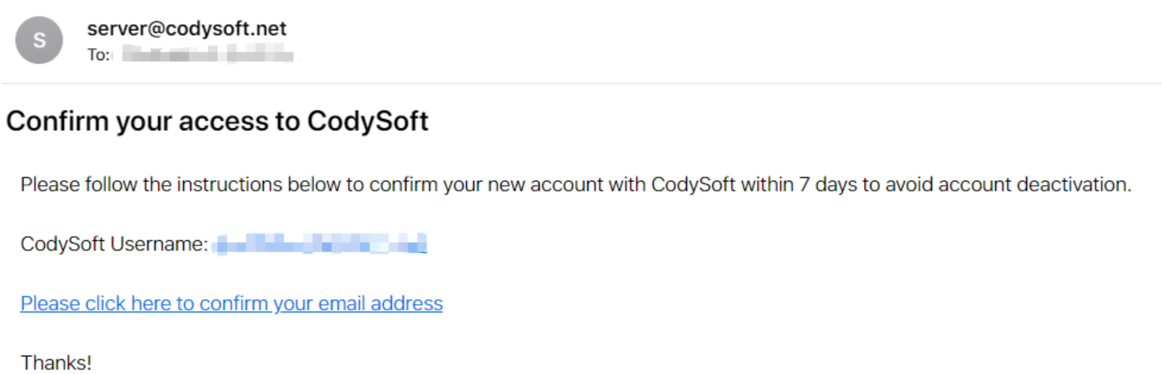
CodySoft®'s Collateral Management Module® is an easy-to-use, single-source solution for marketing materials creation, from project inception through inventory management. The module incorporates project management, document creation, compliance tracking, inventory management, production staging, reporting tools and assets management all in one system. Use this guide to navigate the Collateral Management Module®. This guide provides you with step-by-step instructions for common module activities. If you have questions, please contact your CodySoft® administrator.

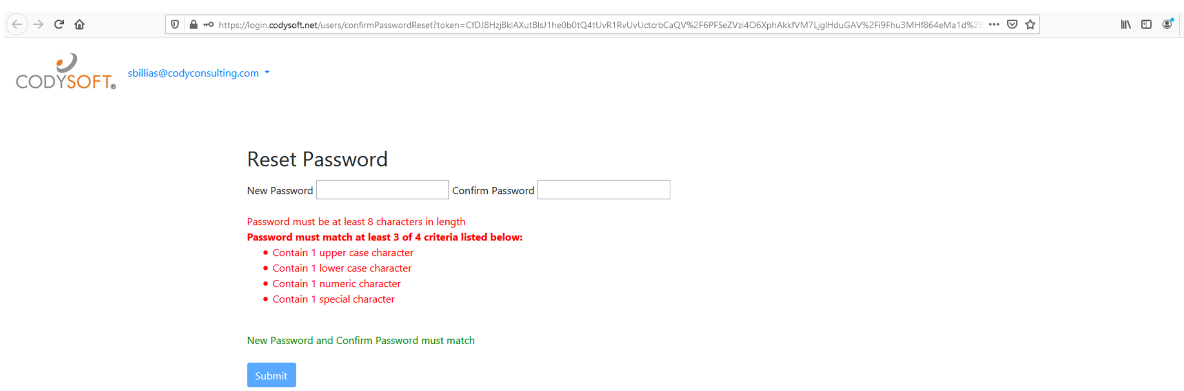
Accessibility



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 link to confirm your email address. When you log in for the first time, you are prompted to create a new password.



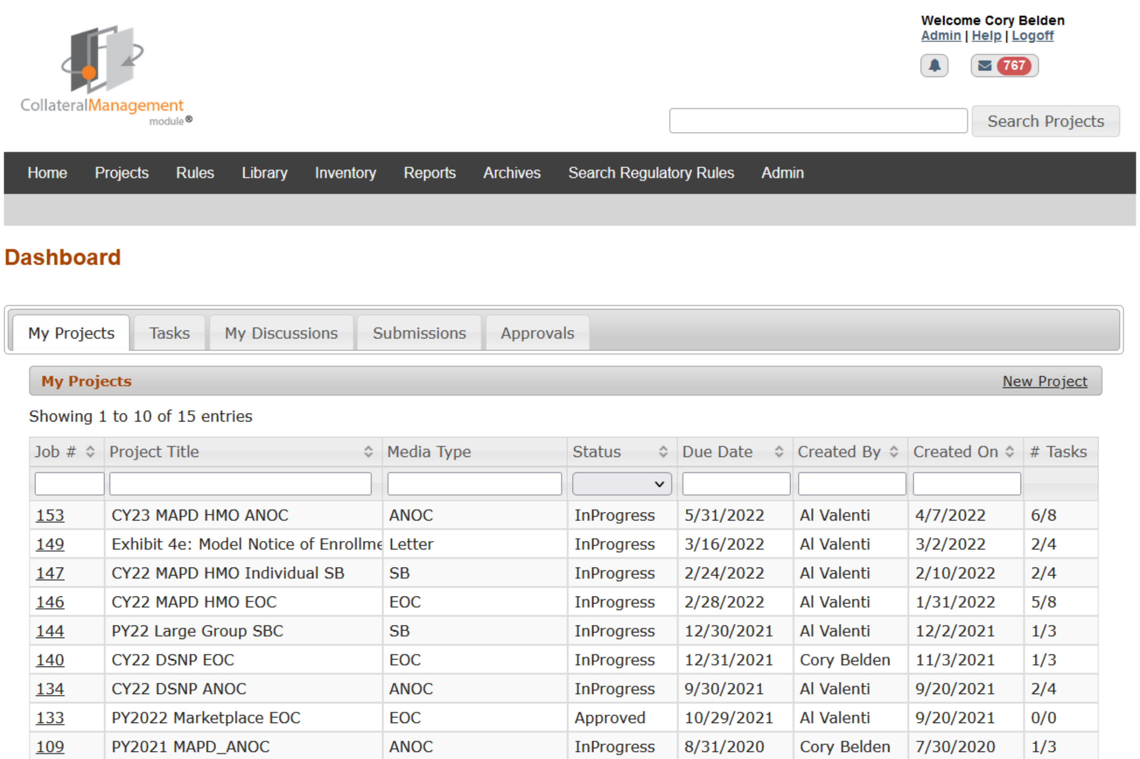
2. In the New Password field, enter a **new password.** Follow the instructions for meeting the password requirement.
3. In the Confirm Password field, enter the **new password** again.
4. Click **Submit.** The login screen displays.
5. Enter your **user name**

6. Enter the **password** you just created
7. Click **Sign in**. You are logged in to the main dashboard of CodySoft.

NOTE: If your company uses Single Sign On (SSO) then you will not be asked to create a CodySoft password when you log in for the first time.

Dashboard

The dashboard is the first screen you see after you log onto the Collateral Management Module®. It provides you with at-a-glance views and convenient access to your projects, tasks, discussions and compliance submissions.



Your view is customizable and is unique to your access role. You can filter on any column. Hover over pop-ups appear on any field on the Dashboard also.

There are five tabs on the Dashboard:

My Projects—displays the list of your current projects. See *Setting up the Project*

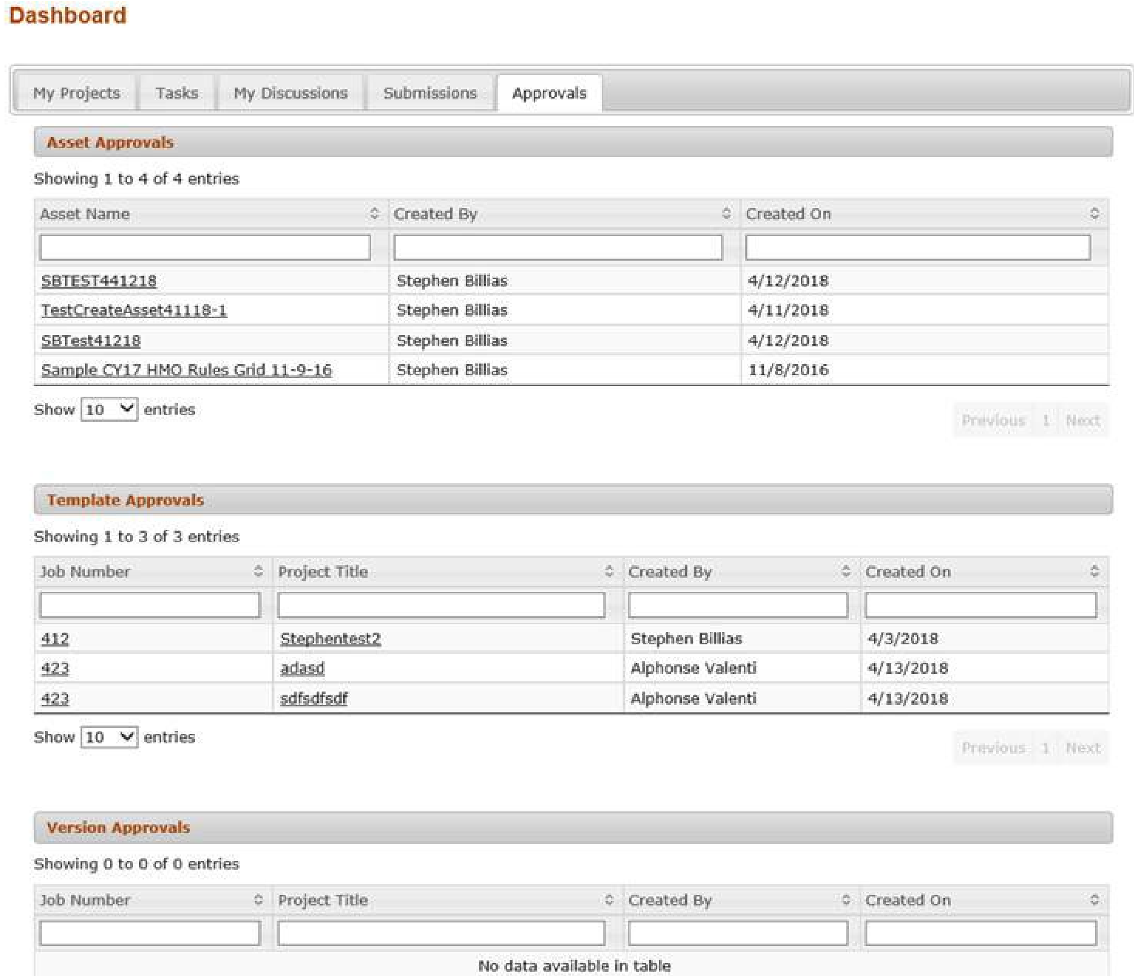
Tasks—displays the list of all tasks assigned to you. See *Tasks and Traffic Management*

My Discussions—displays the list of all active discussions that you are a part of. See *Discussions*

Submissions—displays the list of all submissions that you have filed. See *Compliance*

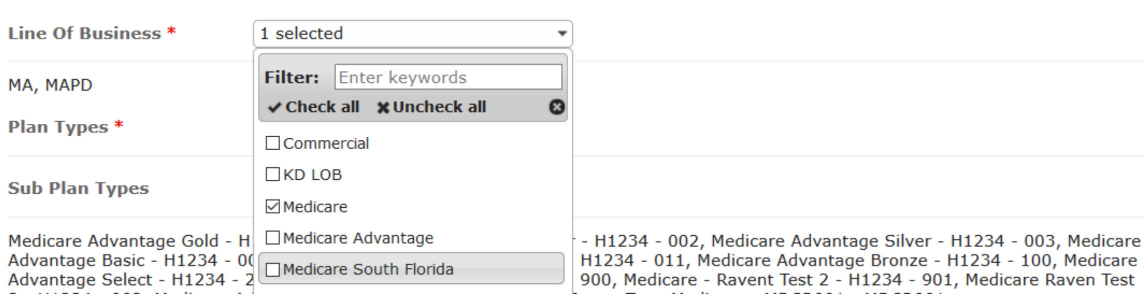
Approvals—displays the list of all pending approval items in three categories:

- Assets
- Templates
- Versions

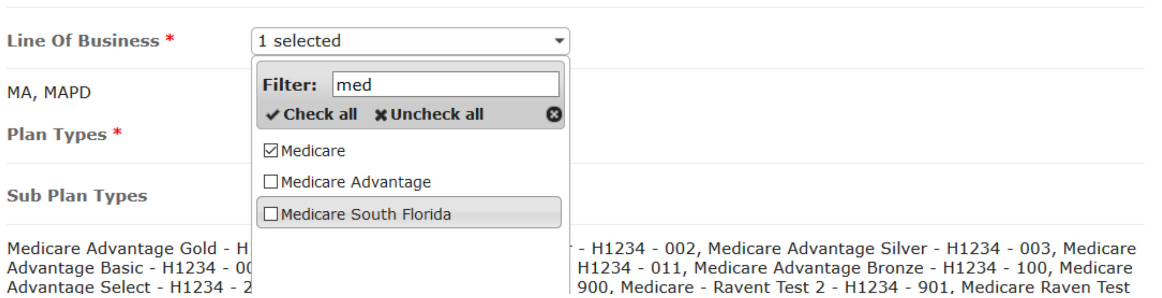


Smart Search

Fields in CodySoft are sorted in alpha order. If a field is a dropdown field with multiple choices, you can use the Smart Search feature to narrow your choices. Enter a few letters in the Filter field at the top of a dropdown list to narrow the list. For example, in the Line of Business (LOB) field on the Project Details screen:

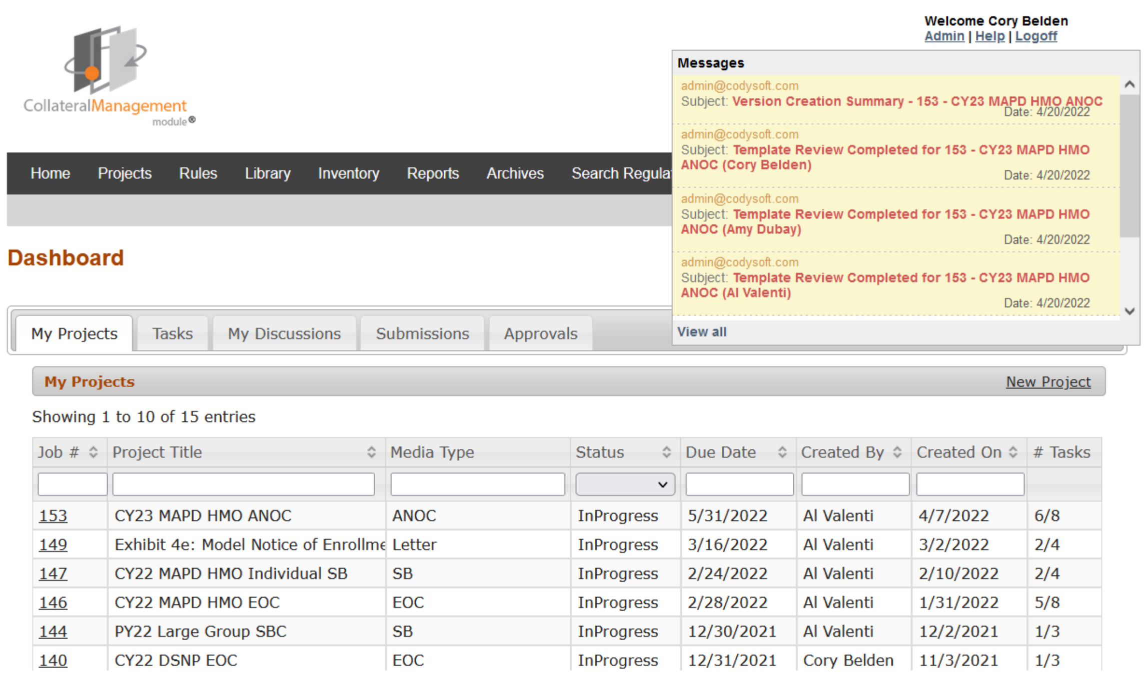


if you enter “med,” the list returns just those LOBs:



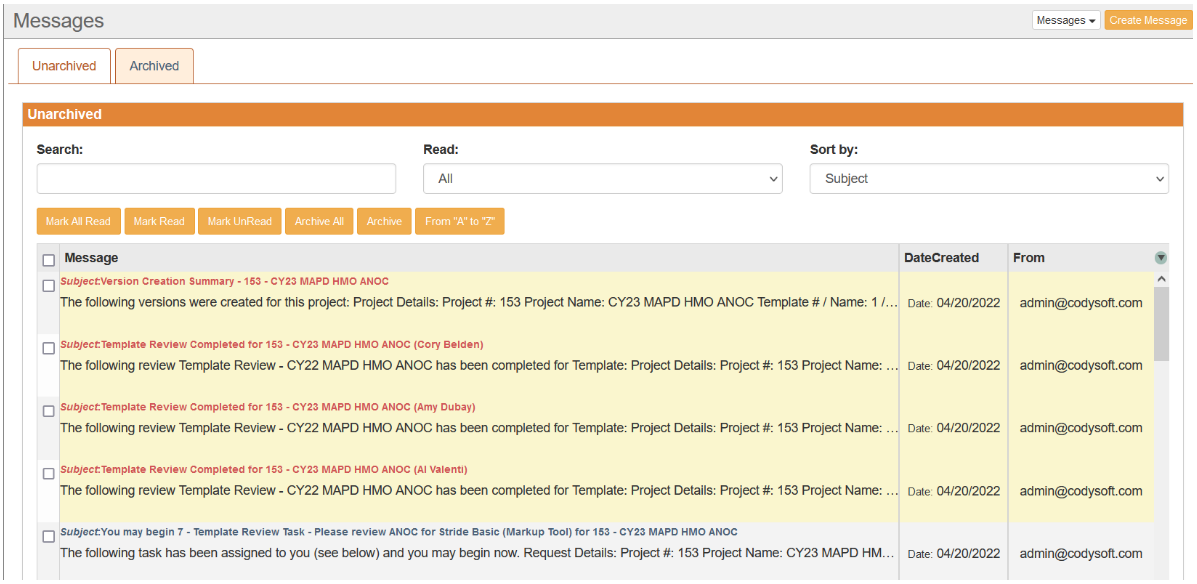
Notifications

The Collateral Management Module® sends messages to notify you of various project-related activities such as when a project request has been approved, when you have been assigned a project task, or when a discussion has been created for your project. The Collateral Management Module® has a Message Center where you can access all notifications.



Notification Message Center (Quick View)

Click the envelope icon  to open the Messages window. The Messages window displays your five most-recent notification messages. To see more messages, click **View All**. The Message Center opens:



From this view, you can locate messages by date or subject. You can also archive your messages and view old messages.

If you are not receiving CodySoft® emails

1. Check to see if your system is redirecting the emails to your bulk/junk email folder.
2. If the emails are in your bulk/junk email folder, right-click one of the emails to display the drop-down list. Select **Junk > Never Block Sender's Domain (@example.com)**.

Redirecting your incoming notification emails

1. In Outlook, create a folder to store your incoming CodySoft® notification emails.
   a. Right-click your **Inbox** folder
   b. Select **New Folder**.
   c. Name this folder for example "CodySoft."
   d. Click **OK**.
2. To create a rule that redirects your incoming notification emails to this folder:
   a. Access Manage Rules & Alerts in Outlook. (Outlook 2003/2007 users: Tools > Rules & Alerts; Outlook 2010 users: File > Info > Manage Rules & Alerts). The **Rules & Alerts** window appears.
   b. Click **New Rule**
   c. *In Step 1: Select a template.* Select **Start from a blank rule** – **Apply rule on messages I receive**.
   d. Click **Next**.

e. In Step 1: Select condition(s): Select the **from people or public group** check box.

f. Select **with specific words in the subject or body**

g. *In Step 2: Edit the rule description.* Click **people or public group**.

h. In the **From** box, type admin@codysoft.com.

i. Click **OK**.

j. Click **specified words**

k. Specify words or phrases to search for in the subject or body

l. Click **Add**

m. Click **OK**

n. In *Step 1: Select action(s).* Select **move it to the specified folder**.

o. In *Step 2: Edit the rule description.* Click **specified**.

p. Choose the folder you created above.

q. Click **OK**.

r. Click **Next**. (There are no exceptions for this rule.)

s. Click **Next**.

t. In *Step 1: Specify a name for this rule.* (Name the rule.)

u. *In Step 2: Setup rule options:* Select the *Turn on this rule* checkbox.

v. Click **Finish**.

Selecting a project or task from the dashboard

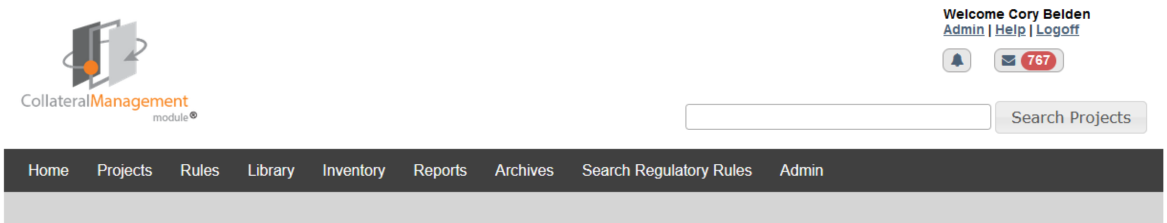
From the list on your dashboard, click the project job number (or project request number). This brings you to a project record (or project request form).

Customizing your dashboard view

1. Click the Show entries dropdown: Show 10 entries to expand your view to 10, 25, 50, or 100 entries on the Dashboard.
2. To sort a column on the Dashboard, click the up or down arrows
3. To filter results in a column, type the first letter or letters of the information you are looking for. **Note**: You can also sort by date by using the calendar widget.
4. To reorder the tabs on the Dashboard, simply drag and drop the tab into the desired position.

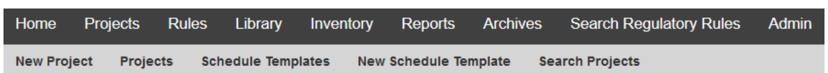
Other Links on the Dashboard

Depending on your level of access, the following links display in the dark gray toolbar on the top of every page in the Collateral Management Module®.



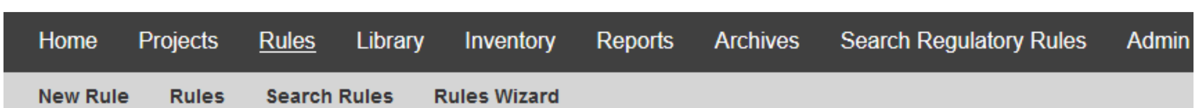
Links on the Dashboard

1. **Home** –Returns you to the csCM dashboard. If you pause the pointer on this link, the **Main Dashboard** Link appears. Click **Main Dashboard** to go to the CodySoft platform dashboard, where you can launch other CodySoft modules your company has licensed. For more information on these modules, please contact your CodySoft administrator.
2. **Projects** - Takes you to a list of active projects. If you pause the pointer on this link, you can access other Project links:



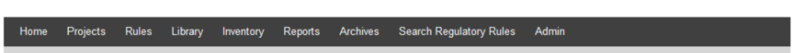
   a. **New Project** – to create a new Project
   b. **Projects** – to display the list of your project
   c. **Schedule Templates** – to see the list of existing schedule templates
   d. **New Schedule Template** – to create a new schedule template
   e. **Search Projects** – to search for a particular project

3. **Rules** – Takes you to a list of the rules that have been created for use in the CodySoft® editor. If you pause the pointer on this link, you can access other Rules links:



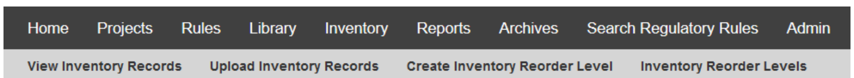
   a. **New Rule** – to create a new rule
   b. **Rules** – to see the list of existing rules
   c. **Search Rules** – to search for a particular rule
   d. **Rules Wizard** – to bulk create rules from a Published Data Asset

4. **Library** – Takes you to the Collateral Management Module® library of digital assets for use in the application. These assets include images, logos, content, data assets and final versions of documents created with the application. If you pause the pointer on this link, you can access other Library links:



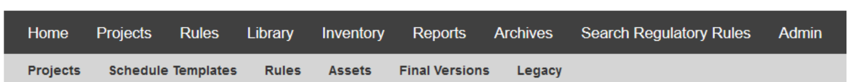
a. **Assets** – to see the list of existing assets
b. **Final Versions** – to see the list of final versioned documents
c. **Document Kits** – to see the list of created document kits
d. **Create Kit** – to create a new document kit
e. **Search Legacy** – to search for uploaded legacy (pre-CodySoft) materials
f. **Create Legacy** – to upload legacy materials

5. **Inventory** –Takes you to a list of items that have been uploaded into the application for inventory management purposes. If you pause the pointer on this link, you can access other Inventory links:



a. **View Inventory Records** – to see the list of existing inventory records
b. **Upload Inventory Records** – to upload new inventory records
c. **Create Inventory Reorder Level** – to set a level for reordering inventory
d. **Inventory Reorder Levels** – to see a list of established inventory reorder levels

6. **Reports** –Takes you to a list of standard reports that are available in Web and XLSX formats, along with a link to Custom Reports which allows you to create custom reports using the CodySoft reporting tool, and a Chart Visualizations tab that provides data analytics in graphic formats.
7. **Archives** – Takes you to a list of archived projects. If you pause the pointer on this link, you can access other Archive links:



NOTE: The Archives tab is available only to users who have the proper user role in CodySoft. If you are unsure of your role, please contact your System Administrator.

a. **Projects** – to see a list of archived projects
b. **Schedule Templates** – to see a list of archived schedule templates
c. **Rules** – to see a list of archived rules
d. **Assets** – to see a list of archived assets
e. **Final Versions** – to see a list of archived final versions of documents
f. **Legacy** – to see a list of archived legacy material

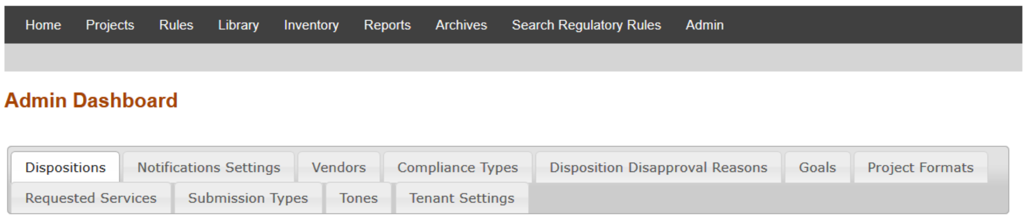
Users with the proper roles can Unarchive any archived item also.

8. **Search Regulatory Rules** –Launches the CodySoft Regulatory Analyzer®, where you can search and update your regulatory rules database.

NOTE: This link is only available to users who have licensed the Regulatory Analyzer®.

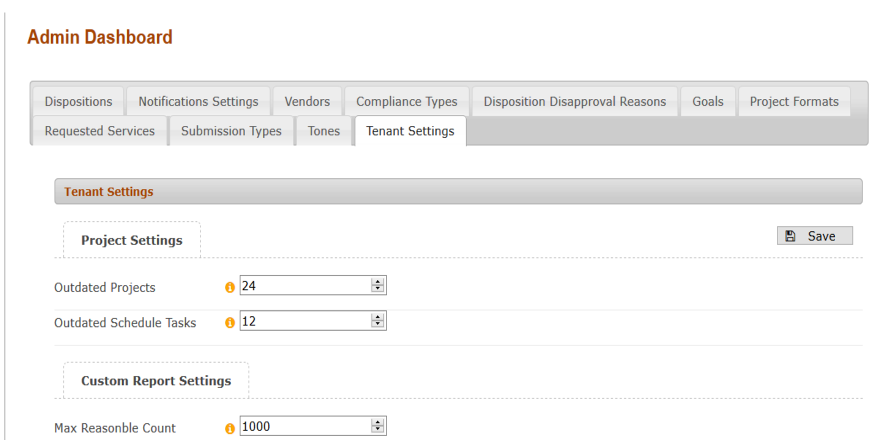
9. **Admin** – Brings you to the admin page, where admin users can manage many of the elements included on the project details screen, as well as other Collateral Management Module® settings:

   NOTE: This link is available only to users with Admin rights.



From the Admin Dashboard you can change the following settings:

- **Dispositions**—View the list of dispositions for a project and add new dispositions
- **Notifications Settings**—view and change the notifications settings
- **Vendors**—View the list of vendors and add new vendors
- **Compliance Types**—View the list of compliance types and add new compliance types
- **Disposition Disapproval Reasons**—View the list of disposition disapproval reasons and add new disposition disapproval reasons
- **Goals**—View the list of goals and add new goals
- **Project Formats**—View the list of project formats and add new project formats
- **Requested Services**—View the list of requested services and add new requested services
- **Submission Types**—View the list of submission types and add new submission types
- **Tones**—View the list of tones and add new tones
- **Tenant Settings**—View and change the project settings for when projects and tasks are considered outdate and change the limit on the maximum number of projects that can be displayed in a custom report.



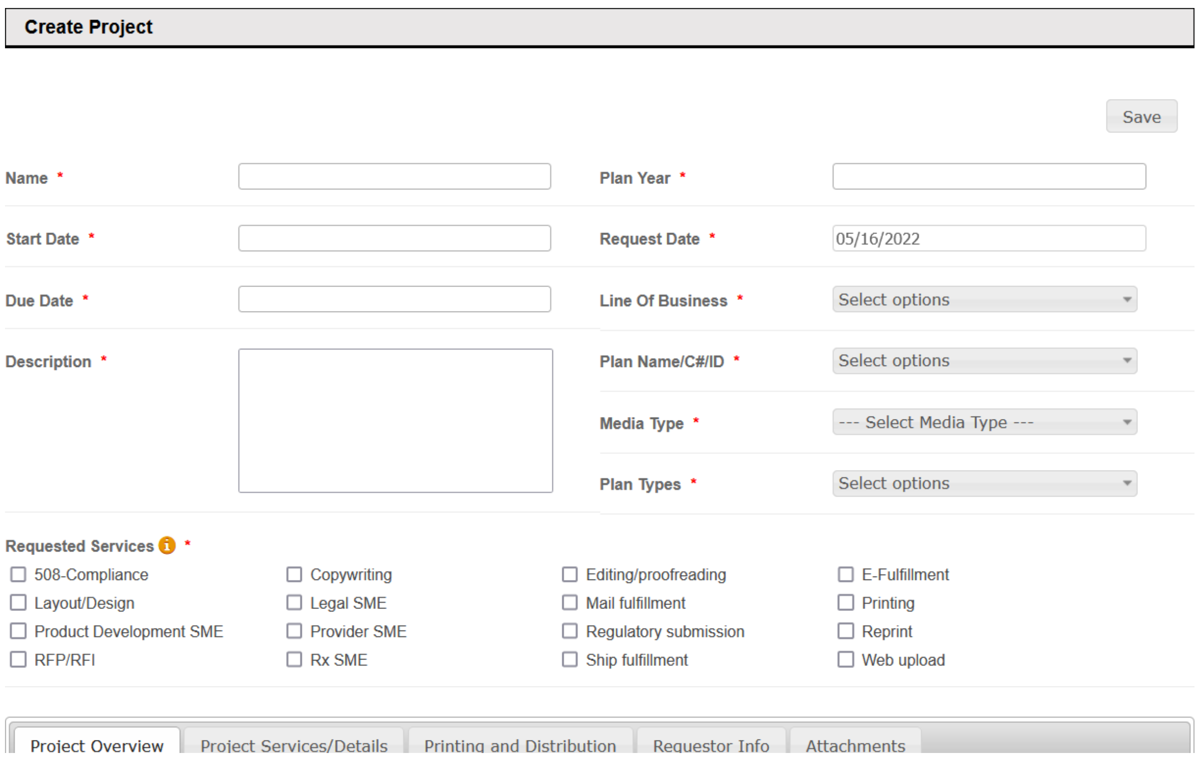
Setting up the Project

Project Requestor

The first step in a CodySoft project is for the project requestor 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**. The Create Project page displays:



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. Special characters like "$" and "%" are allowed in project filenames.

    b. **Plan Year –** Enter the plan year covered by the communication.

    c. **Start Date –** Enter the project start date using the calendar widget

    d. **Due Date –** Enter a project Due Date using the calendar widget

    e. **Audiences** – Select your material's audience from the drop-down list.

    f. **Line of Business –** From the drop-down list, select the checkboxes for the **lines of business** that apply to this project.

g. **Departments** – Select the appropriate departments from the drop-down list.

h. **Plan Name/C#/ID –** From the drop-down list, select the checkboxes for the **contract numbers** that apply to this project.

i. **Description –** Enter a brief **Description** of the project

j. **Budget Estimate** – Enter a preliminary budget number. When the project is complete, come back to this tab and enter the final budget amount in this field

k. **Request date** – This is the date you are submitting your request. It is an auto-generated field.

l. **Media Type –** From the drop-down list, select the **Media Type** for this project.

m. **Copy Supplied** – Select the Yes option if written copy is included in the request (If you select Yes but do not attach any copy in the **Attachments** tab, you receive a reminder to do so.)

n. **Plan types** – Select the plan types from the drop-down list (for example, *Classic Gold HMO MAPD*).

o. **Requested Services** – Select all requested services required for the creation of your material. Note that you can select Other and enter your own requested service.

p. Optionally click **Add Attachment** on the Attachments tab below to attach any relevant documents that apply to this project. For example, if you choose Copy Supplied=Yes you must upload material for the project as an attachment.

q. If known, select the **Project Manager** on the Project Overview tab below. Select the user responsible for managing the day-to-day details of this collateral material project from the drop-down list. You can do this now or after you save the project. The project must have a project manager to be approved. The Traffic Manager is responsible for selecting the project manager if none is selected here.

r. Click **Save.** The project is created with an auto-assigned number and placed in Submitted status. See *Project Statuses: Approving and Declining New Projects* for next steps.

You will receive a notification email from CodySoft® that your project request has been submitted for review and approval. See *Traffic Management Functions Roles and Responsibilities* for details on how the Traffic Manager or Project Manager handles project requests.

Project Options

After the project is approved, you have several options for continuing work on the project:

Copy project – Click Copy Project to make a duplicate of this project with all fields in the new project the same as in the one you copy. The copy process creates a new project with a new number. Change the project name in the copied project to distinguish it from the original project. **NOTE**: Schedules and Templates do not carry over into the copied project.

Complete – Click Complete to complete the project and move it to the Archives. Any open tasks associated with the project will be removed from the task list. A notification is sent that the project has been archived.

In Progress – Click In Progress to move the project to the state where you can begin to add tasks and perform other project tasks.

On Hold – Click On Hold if you need to pause work on the project but you don't want to cancel it.

Exit – Click Exit to stop editing the project. If you have made changes to the project you will get a message asking if you want to leave the project without saving your changes.

Cancel Project– Click Cancel if you need to end a project before it is completed. Cancelled projects are automatically archived.

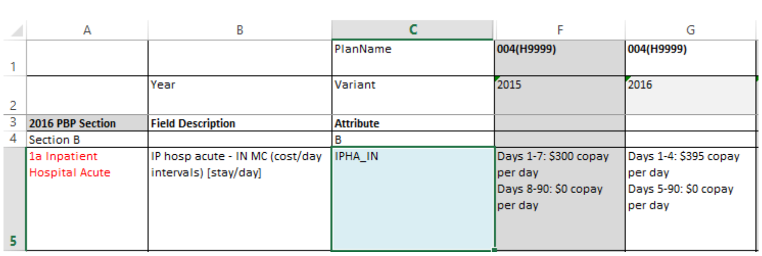
NOTE: You can cancel a project only after it has moved to the In Progress state.

Grids

Populating the Data Grid

CodySoft supplies you with a standard Excel spreadsheet data grid template for capturing variable benefit information for use in the Collateral Management Module.

Example:



	A	B	C	F	G
1			PlanName	004(H9999)	004(H9999)
2		Year	Variant	2015	2016
3	2016 PBP Section	Field Description	Attribute		
4	Section B		B		
5	1a Inpatient Hospital Acute	IP hosp acute - IN MC (cost/day intervals) [stay/day]	IPHA_IN	Days 1-7: $300 copay per day Days 8-90: $0 copay per day	Days 1-4: $395 copay per day Days 5-90: $0 copay per day

For each benefit, you enter the value for the previous year and the current year in the appropriate cells. The values are identified as attributes. For example, the attribute IPHA_IN in column C in the preceding figure is the name that you insert as an element in the template to retrieve the data in the cells in the plan columns, based on rules you create and apply to the attribute in the template. Use letters and numbers only in the attribute names—the only special characters allowed are underscores (_) and hyphens or dashes (-). Once you have populated the data grid with values, you upload the data grid to CodySoft and create rules to insert the values in the data grid into your template.

NOTE: If any of your data grid cells contain hyperlinks to URLs, they are merged as live links both in Test the Template and Versioning, in both Word documents and PDF. *See Testing, Approving, Declining, and Cancelling the CodySoft® Template* and *Data-merged Versioning*.

Uploading the Data Grid to the Library

You upload the data grid just like any other asset. See *Adding a New Asset to the Library*.

Creating a Rules Grid

You can create Rules Grid to manage how your rules are implemented in CodySoft. Here are a few tips for creating a Rules Grid:

- Put the PBPs (the plans) in the same column order as they appear in your Data Grid.
- In the attribute row, add the plan type, service area/state, or other information that you choose
- Populate the x's in the plan columns based on the current plan year's data that you have. Update it when you receive new or changed data from the data grid, PBP reports, or client questionnaires.

The rules grid is set up with a list of rules in one column, the plans in columns to the right of the rules, and x's in the plan columns denoting which rules apply to which plans. Because the Rules Grid is an Excel document, you cannot edit it in CodySoft, but you can have it open from a local source and re-upload to CodySoft if you make changes from what is already uploaded in CodySoft. Here's a sample portion of a rules grid:

A	B	C	D	E
		PlanName	**001(H123**	**002(**
		Variant	2018	2018
		Attribute	Ventura	Los A
		Plan_Name	Plan A	Plan E
Rule description	**Location in model**	**Rule**		
if members may receive Extra Help from Medicare to help pay for Medicare Rx drug	ANOC 2.6, 1.4.1, ch 5/6 intro	mayExtraHelp	x	x
if plan has optional supplemental benefits	1.4.1, 4.2.2, ch 12	optsupbens	x	

Rules Grid Format

All grids must have this exact text in the following cells before uploading:

1. C1: PlanName
2. C2: Variant
3. C3: Attribute

Use all **lowercase x's** in the applicable PBP cells. The capitalization of the "x" affects the rules you'll enter in CodySoft.

Upload your rules grid as you would the data grid or any other data asset. See *Adding a New Asset to the Library*

Alternate Grid Options

Populating the Operational Grid

In addition to the data grid for benefit and copay information, you can set up an Excel spreadsheet as an Operational Grid for capturing other variable information for use in the Collateral Management Module®. This information might be items like addresses, phone numbers, and website URLs that vary from plan to plan, or it might be pieces of text that change from plan to plan, require no special formatting, and can be imported directly from the Excel spreadsheet.

Example:

	A	B	C	D	G
1			PlanName	007(H9999)	001(H9999)
3	Description	Chapter/Section	Attribute	HMO MAPD	HMO-POS MAPD
98	You [insert as applicable: may OR must] choose a Primary Care Provider (PCP) to provide and oversee your medical care	3.1..2	Referralmustmay	In most situations, your network PCP must give you approval in advance before you can use other providers in the plan's network, such as specialists, hospitals, skilled nursing facilities, or home health care agencies. This is called giving you a "referral." For more information about this, see Section 2.3 of this chapter	Your PCP may refer you to other providers in the plan's network, such as specialists, hospitals, skilled nursing facilities, or home health agencies. . This is called giving you a "referral." For more information about this, see Section 2.3 of this chapter.

The attribute *Referralmustmay* in column C in the preceding example is the attribute name that you insert in the template to retrieve the data in the cells based on rules you apply to the attribute in the template. In this example, the combination of attribute and rule would put the text in cell D98 in the HMO plan document and would put the different text in cell G98 in the HMO-POS plan document. When you have populated the operational grid with values, you upload the operational grid to CodySoft and create rules in CodySoft to insert the values in the operational grid into your template.

Uploading the Operational Grid to Library

You upload the operational grid like any other asset. See *Adding a New Asset to the Library*

Creating an Asset Application Grid

When you are creating a template in a CodySoft® project, you may create assets that you want to associate with a project. These assets may be Word documents that you want to bring into the template as separate sections, already formatted. They may be other assets such as ID Card images. You create and develop these assets outside of CodySoft, and then upload them to the Library. See *Adding a New Asset to the Library.* The Asset Application Grid allows you to associate Rules and Assets to multiple plans from one data source. CodySoft supplies you with a standard Excel spreadsheet asset application grid template for that gives you a method of assigning data assets to specific plans in the Collateral Management Module®.

1. Open the Asset Application Grid on your local machine
2. Add a row for each Asset you want to use. These may be Word assets, or they may be other types of assets like ID Card images and so forth.
    a. In the Asset column of each row, enter the **asset name**
    b. In the Rule column of each row, enter the **rule name**
3. Add a column for each plan in which you want to insert assets. The first four rows in each column include the following information:
    - **PlanName**: The plan number and contract number of the plan, in this format: nnn(Hnnnn)
    - **Variant**: The contract year
    - **Attribute**: The state in which the plan is in effect
    - **Plan_Name**: The full plan name as listed in the data grid, for example: PrimeMedicare Gold HMO
4. In the row for each asset, enter an "x" in the cell for each plan for which you are going to bring the asset into the template.
    <u>Example</u>:

	A	B	C	D	E	F	G
1			PlanName	001(H1234)	001(H2345)	007(H2345)	013(H1234)
2			Variant	2016	2016	2016	2016
3			Attribute				
4			Plan_Name	Medicare Advantage Plan Name	Medicare Advantage Plan Name2	Medicare Advantage Plan Name3	Medicare Advantage Plan Name4
5	**Asset Name**	**Description**	**Rule**				
6	Plan 1 benefits changes table	Plan 1 ANOC table in section 1.5	Diamond_Bene	x			x
7	Plan 2 benefits changes table	Plan 2 ANOC table in section 1.5	Ruby_Bene		x	x	
8	ANOC SPAP bullet	Bullet for SPAP information for certain plans	ANOC_SPAP	x		x	

    In the preceding example, the *Diamond_Bene* rule in cell C6 inserts the asset named *Plan 1 benefit changes table* defined in cell A6 into the plans marked with an "x" in columns D and G. You can customize the asset application grid to set up rules for as many assets and plans as you have in your project.
5. Click **Save** to save your changes
6. **Close** the asset application grid

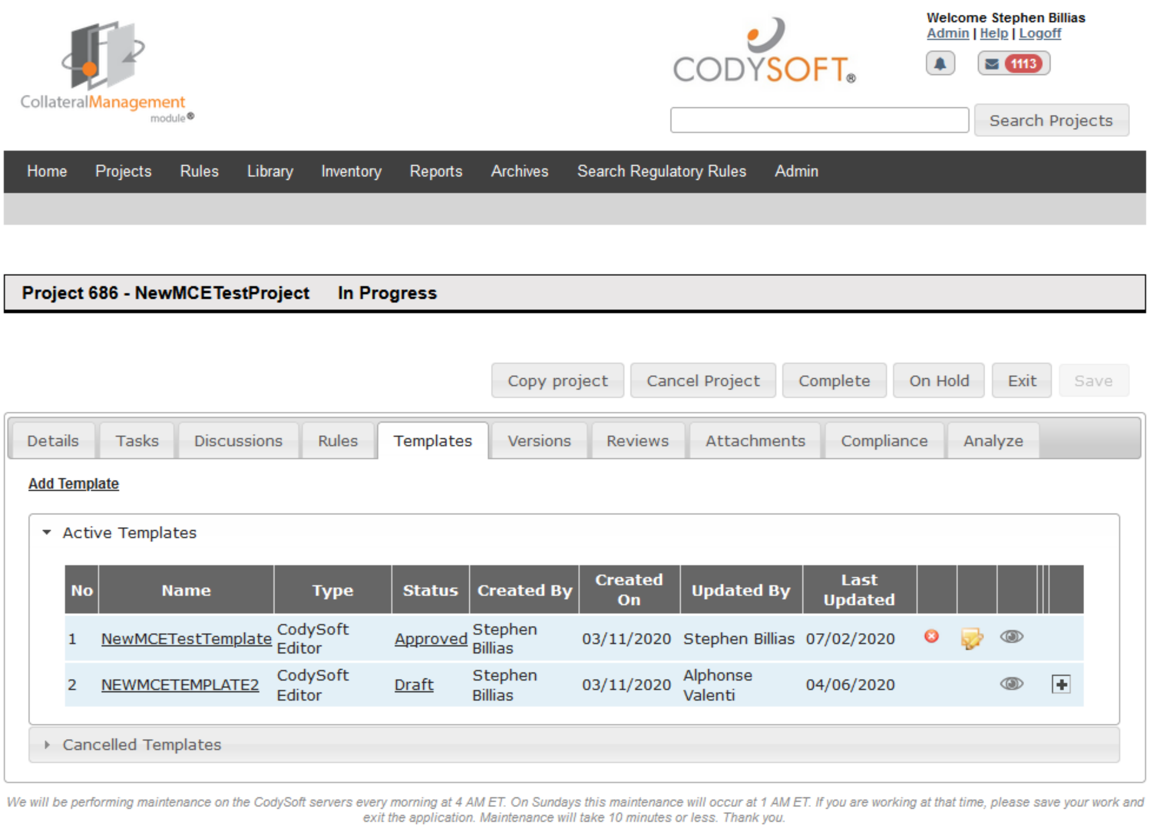
Uploading the Asset Application Grid to Library

You upload the asset application grid like any other asset. See *Adding a New Asset to the Library*

Working in the Template

Templates Tab

The Templates tab lists all templates for the project. From the Library menu, select **Templates**. The Templates screen displays:



- **Name** — Click the underlined document name to edit the template. See *Viewing and editing a CodySoft Editor Template.*
- **Type** — Displays the Type selected when the template was created. See *Adding, Viewing, and Editing Templates.*
- **Status** — Displays the Status of the template:
  - Draft
  - Approval Pending
  - Approved
  - Published

  See *Testing, Approving, Declining, and Cancelling the CodySoft® Template.*
- **Created By** — Displays the name of the person who created the template
- **Created On** — Displays the date the template was created

- **Updated By** — Displays the name of the person who last edited the template
- **Last Updated** — Displays the date the template was last edited
- **Cancel icon** — Click the cancel icon  to cancel the template
- **Versions icon** — Click the versions icon  to make versions from approved templates. See *Working with Versions*.
- **Review icon** — Click the review icon  to send a template for review
- **Plus sign (+) icon** — Click the plus sign (+) icon to view previous versions of the template and roll back if necessary. See *Template revisions*.

The Templates tab includes a button for adding a new template. See *Adding a New Template*.

The tab includes separate sections for Active and Cancelled templates. See *Cancelling a Template.*

Adding a New Template

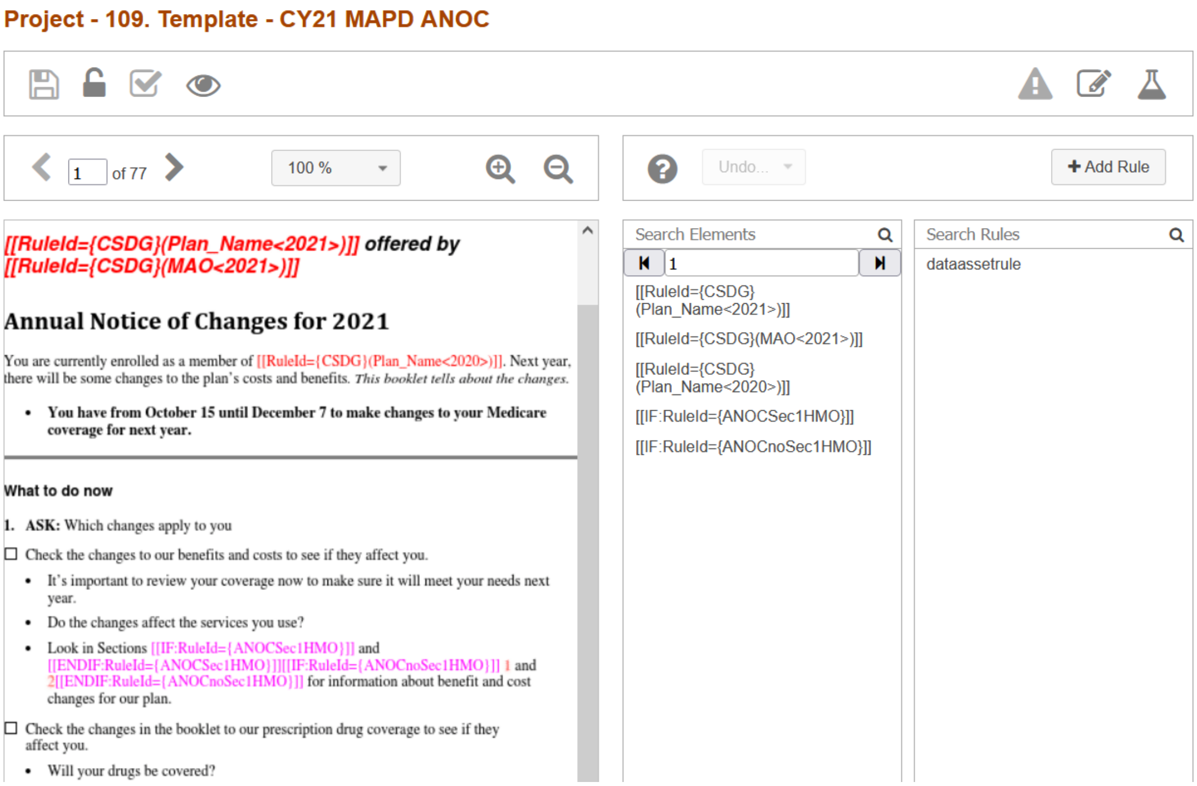
You can add three types of templates to a Collateral Management Module® project:

- File
- CodySoft editor
- Excel

This guide explains how to access each of the three types of templates, edit the templates, and save them to the CodySoft server. See *Adding, Viewing, and Editing Templates*

Viewing and editing a CodySoft Editor Template

1. Click the filename of the template you wish to access. The following screen displays, with the project name and template name in the upper left of the screen:



The toolbar icons across the top of the template editor page are as follows:

Save template

Unlock Template and Return to Project

Approve Template or Revert status to Draft (note this is not enabled on the template editor screen when there is an open review)

View file (read only)

Show validation errors

Edit Template

Test the Template

2. Click the **Edit Template** icon.

   NOTE*:* Once you open the template document, this document is available in Read-Only view only for other users. To unlock this template, save and close the file and click the **Unlock Template and Return to Project** icon.

3. Make edits to your documents.
4. Click **Save**.
5. Close the file.
6. Click the **Unlock Template and Return to Project** icon

Navigating on the template editor screen

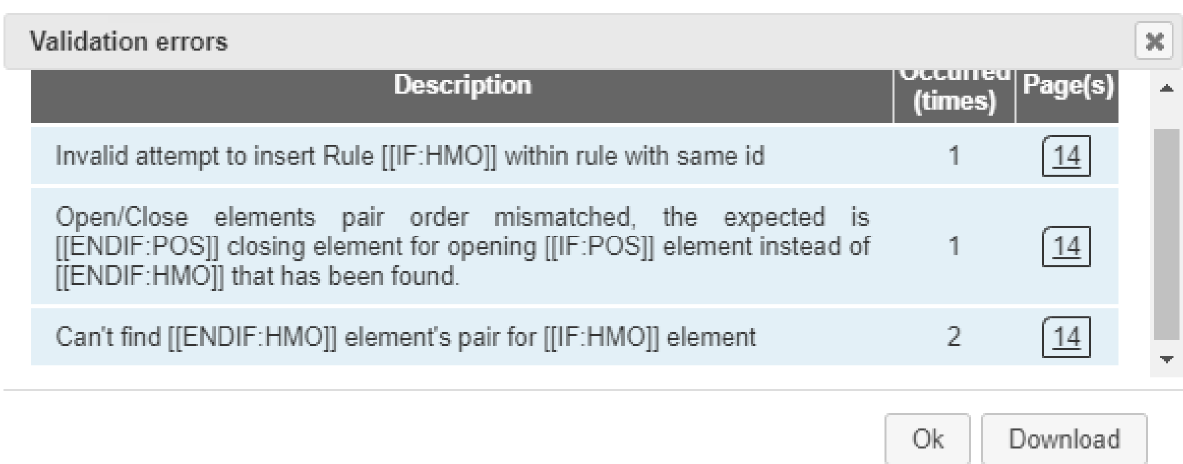
Use the navigation toolbar to move easily through the document:

- Use the left and right arrows to go forward and backward
- Enter a page number to jump to that page
- Click the magnifying glasses to zoom in or out on the page
- Use the percentage dropdown to change (zoom) the screen image size

Fixing Validation Errors

If your template has validation errors, you can access and fix them from the template editor screen.

1. Click  Show validation errors. The list of validation errors displays:



Validation errors

Description	Occurred (times)	Page(s)
Invalid attempt to insert Rule [[IF:HMO]] within rule with same id	1	14
Open/Close elements pair order mismatched, the expected is [[ENDIF:POS]] closing element for opening [[IF:POS]] element instead of [[ENDIF:HMO]] that has been found.	1	14
Can't find [[ENDIF:HMO]] element's pair for [[IF:HMO]] element	2	14

Ok Download

2. Click the page number to go to the page number in the PDF view on the left side of the template editor screen.
3. Review the page and identify the errors and then edit the template to correct them.

4. Alternately, click Download to download the list of validation errors in an Excel .csv file that you can use or save for making future corrections to the template.

Viewing and editing an Excel Template

1. Click the pencil icon  to open the Excel file.

   NOTE*:* When you open the Excel template document, it is available in Read-Only mode for other users.

2. Make edits to your Excel document.
3. Click **Save**.
4. **Close** the Excel Document. Your changes are saved and uploaded to the CodySoft server.
5. Click **Unlock Template and Return to Project**

Adding Elements

In your CodySoft Editor template, you create elements using the attribute names you established in your data grid, rules grid, operational grid, and asset application grid. You can copy and paste attribute names directly from your grids to use as element names in the template.

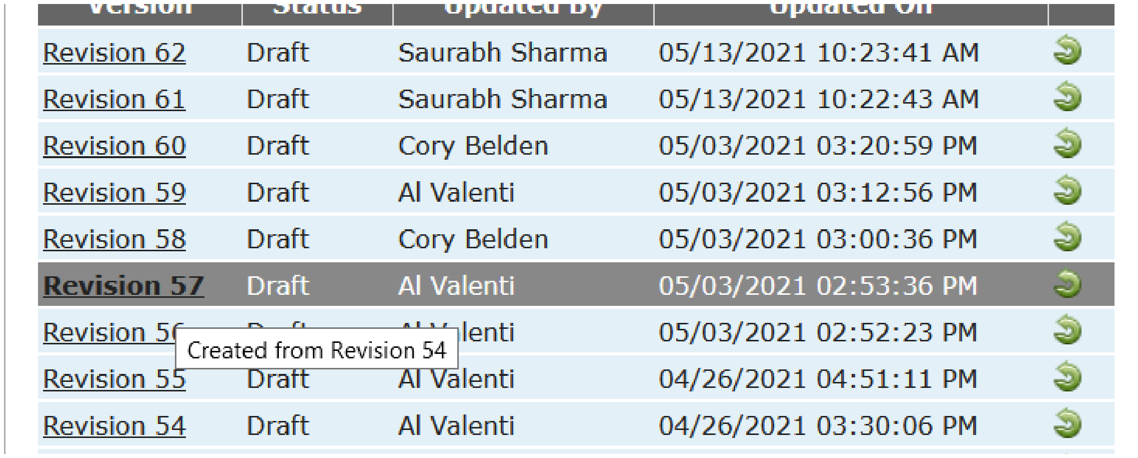
1. From the dashboard, select the project that contains the template you want to edit
2. From the home page of the individual project click the **Templates tab**
3. From the list of templates, click the **Name** of the template you want to edit**.** The template appears in a three-column format:

Page 1 of the current template in the left column	The list of Elements on the current page in the center column	The list of Rules in the right column.

4. Click **Edit Template**
5. **Open** the document in Word when prompted
6. Click **Enable Editing** if prompted
7. Navigate to the page where you want to add elements to the template.
   NOTE: If you enter a page number in the page navigation bar in the center column for Elements, the Preview window on the left updates to that page.
8. Add elements from your data grid, rules grid, or operational grid. The format for these elements is to surround them with double brackets. For example, if your data grid attribute is Plan_Name, you would create an element called [[Plan_Name]] in your CodySoft template.
9. **Save** the document in Word
10. **Close** the document
11. Click **Save**

Template revisions

You can roll back a template to any previous revision. On the list of templates, click the plus sign (+) icon at the end of the row of any template to view previous versions of the template and roll back if necessary. The Revisions history screen displays revision(s) that have been created from a prior revision in bold and identifies the prior revision number from which they were created.

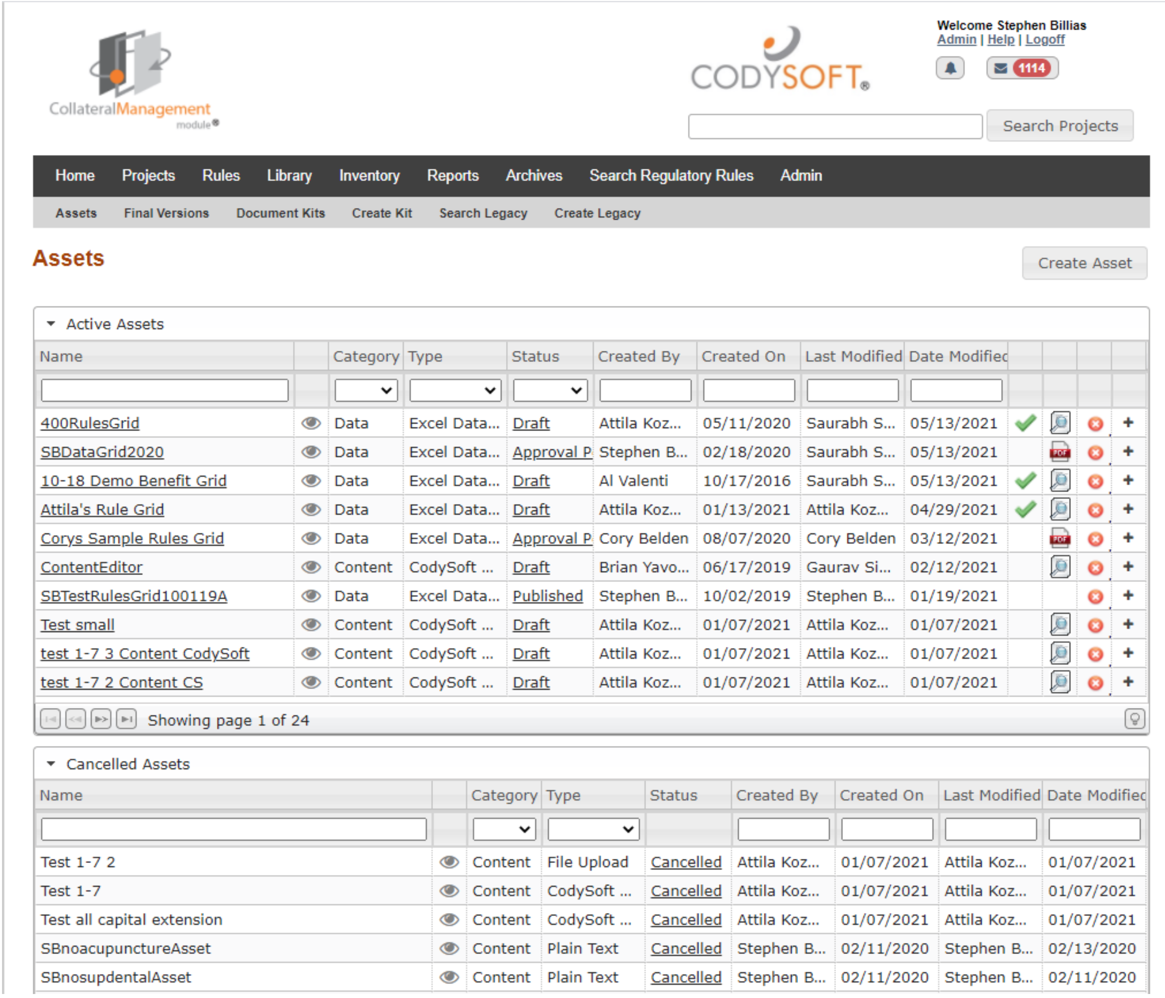


Overview of Assets

The Assets screen

The Assets screen provides you with methods for filtering, searching, reviewing, editing, and creating new assets.

From the Library menu, select **Assets**. The Assets screen displays:



The screen provides two work areas:

- Active Asset
- Canceled Assets

From the Assets screen you can create a new asset by clicking **Create Asset**. See *Adding a New Asset to the Library*.

Active Assets area

The Active Assets area of the Asset screen provides the following columns and their associated functionality:

- **Name** — Click the underlined document name to access the Edit Asset screen.
- **View** — Indicates if the asset is editable (the pencil editing icon) or read only (the eye icon). Click the appropriate icon to open the asset for editing or to view in read only mode.
- **Category** — Displays the Asset Category selected when the asset was created
- **Type** — Displays the Type selected when the asset was created

- **Status** — Displays the Status of the asset:
    - Draft
    - Approval Pending
    - Approved
    - Published
- **Created By** — Displays the name of the person who created the asset
- **Created On** — Displays the date the asset was created
- **Last Modified By** — Displays the name of the person who last edited the asset
- **Date Modified** — Displays the date the asset was last edited
- **Validate** — Click the green arrow to validate that the asset contains no errors
- **Review icon** — Click the review icon to send a document for review and approval
- **Cancel icon** — Click the cancel icon to cancel the asset
- **Plus sign (+) icon** — Click the plus sign (+) icon to view previous versions of the asset and roll back if necessary.

  NOTE: You can roll back an asset to any previous revision. The Revisions history screen displays revision(s) that have been created from a prior revision in bold and identifies the prior revision number from which they were created.

Version	Status	Updated By	Updated On	
Revision 62	Draft	Saurabh Sharma	05/13/2021 10:23:41 AM	
Revision 61	Draft	Saurabh Sharma	05/13/2021 10:22:43 AM	
Revision 60	Draft	Cory Belden	05/03/2021 03:20:59 PM	
Revision 59	Draft	Al Valenti	05/03/2021 03:12:56 PM	
Revision 58	Draft	Cory Belden	05/03/2021 03:00:36 PM	
Revision 57	Draft	Al Valenti	05/03/2021 02:53:36 PM	
Revision 56	Draft	Al Valenti	05/03/2021 02:52:23 PM	
Revision 55	Draft	Al Valenti	04/26/2021 04:51:11 PM	
Revision 54	Draft	Al Valenti	04/26/2021 03:30:06 PM	

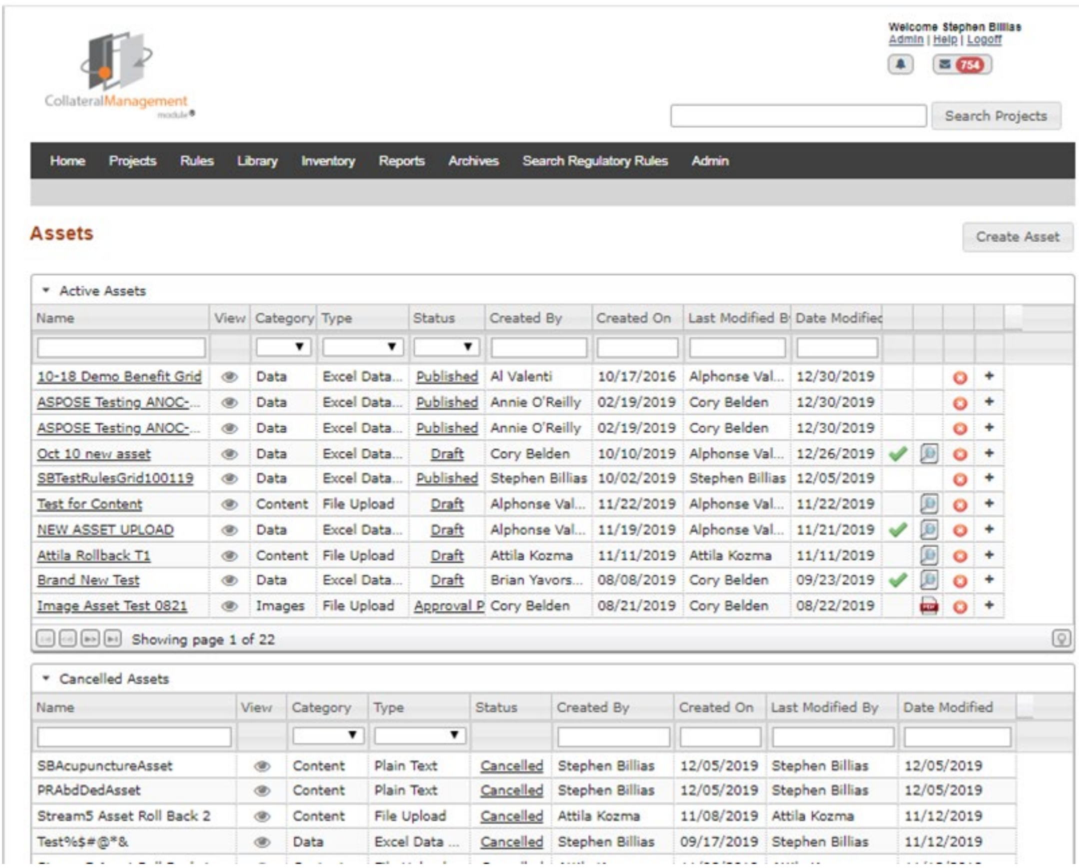
Created from Revision 54

NOTE: A blank row underneath the column name indicates that you can search and filter on those columns. You can filter on multiple columns to find an asset or a group of similarly named assets.

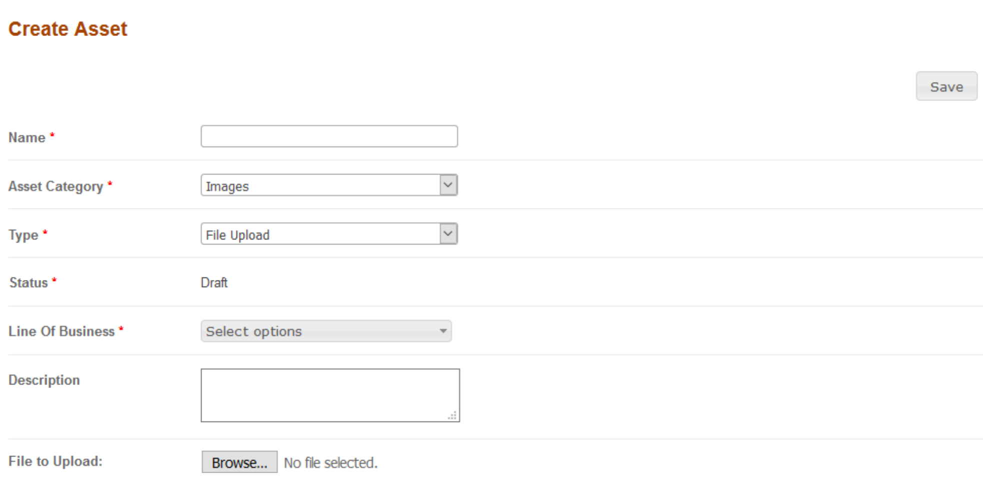
Adding a New Asset to the Library

The process for adding assets to a CodySoft library in a project is the same for all kinds of assets:

1. From the dashboard, select **Library**
2. From the Library choices, select **Assets.** The Assets screen displays.



3. Click **Create Asset.** The **Create Asset dialog displays:**



4. Enter an asset **Name.** Special characters like "$" and "%" are allowed in asset filenames.
5. From the Asset Category drop-down list, select a category from these choices:

- **Content** – files for use in CodySoft, either as File templates for CodySoft Editor templates, or other asset content files.
- **Data** – Data files. (The required format for use with rules for the Document Editor: Microsoft Excel.)
- **Images** – Graphic files for layout. (Required formats for use with rules for the Document Editor include: jpeg, jpg, png, gif and bmp.)
- **Logos** – Graphic files for your company's identity. (Required formats for use with rules for the Document Editor include: jpeg, jpg, png, gif and bmp.)

6. From the Type field drop-down list, select the asset Type. Your choices depend on the Asset Category you have chosen:
    - For Content:
        - File Upload
        - CodySoft Editor
    - For Data
        - File Upload
        - Excel Data Asset
    - For Images or Logo, Type is File Upload

    The **Status** field defaults to **Draft** for Create Asset
7. From the Line of Business drop-down list, select all lines of business that apply to this asset.
8. Enter a brief **Description** of the asset
9. In the File to Upload field, click **Browse**
10. Navigate to the asset
11. Click to select it
12. Click **Open**
13. Click **Save.** The asset appears on the list of assets. See *Overview of assets*.

NOTE: Please check your Asset for formatting if you encounter any errors during the upload process. Make sure that formatting is applied only to active cells in your Asset, and not to rows and columns outside the populated area.

Edit an Asset

To edit an asset:

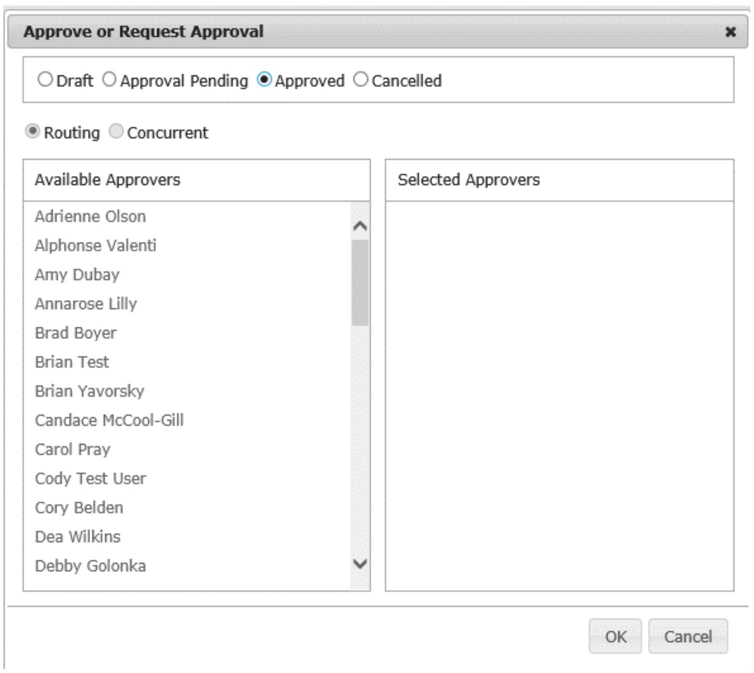
1. Click the document name
2. On the Edit Asset screen, click **Edit Document**
3. Edit the document
4. Click **Save**
5. Close the document

NOTE: If you edit a document in Published status, it moves back to Draft status automatically. Previous versions and their status are kept in CodySoft. Click the plus sign (+) to view versions

Send an Asset for Review

To send an asset for review:

1. Click the review icon on any asset in Draft status.
2. Change the **Status** to **Approval Pending**
3. Identify the **Approval Method**, either Concurrent or Routing
4. Select approvers from the list:



   NOTE: the project manager who submits the asset for approval is included automatically as an approver when Approval Pending is selected. The project manager can also approve the document on their own by selecting Approved and clicking OK without selecting any other approvers.

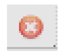
5. Click **OK**. The document now displays as Approval Pending on the Assets tab.

Review an asset

1. To review and edit the document, click the PDF file icon  for the asset.
2. Review the document and add comments as you would in a Template review. See *Marking up documents with the Markup Tool*.
3. When you have completed your review, close the Review window.

Cancel an Asset

To cancel an asset:

1. Click the red x icon  on any asset. The asset is cancelled and moved from the Active tab to the Cancelled tab on the Assets screen.

You can also cancel an asset by this method:

1. Click the review icon on any asset
2. Change the Status to **Cancelled**. Do not select any approvers.
3. Click **Ok**. A dialog displays, asking you to confirm the cancel action.
4. Click **Ok** again. The asset is moved to the Cancelled assets list.

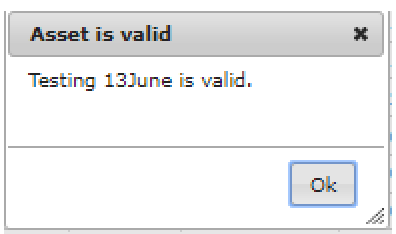
<u>Notes on cancelling assets</u>:

- You cannot cancel an asset in Pending Approval status.
- If you try to cancel a Published asset that is in use in one or more projects, you will get a message listing those projects.

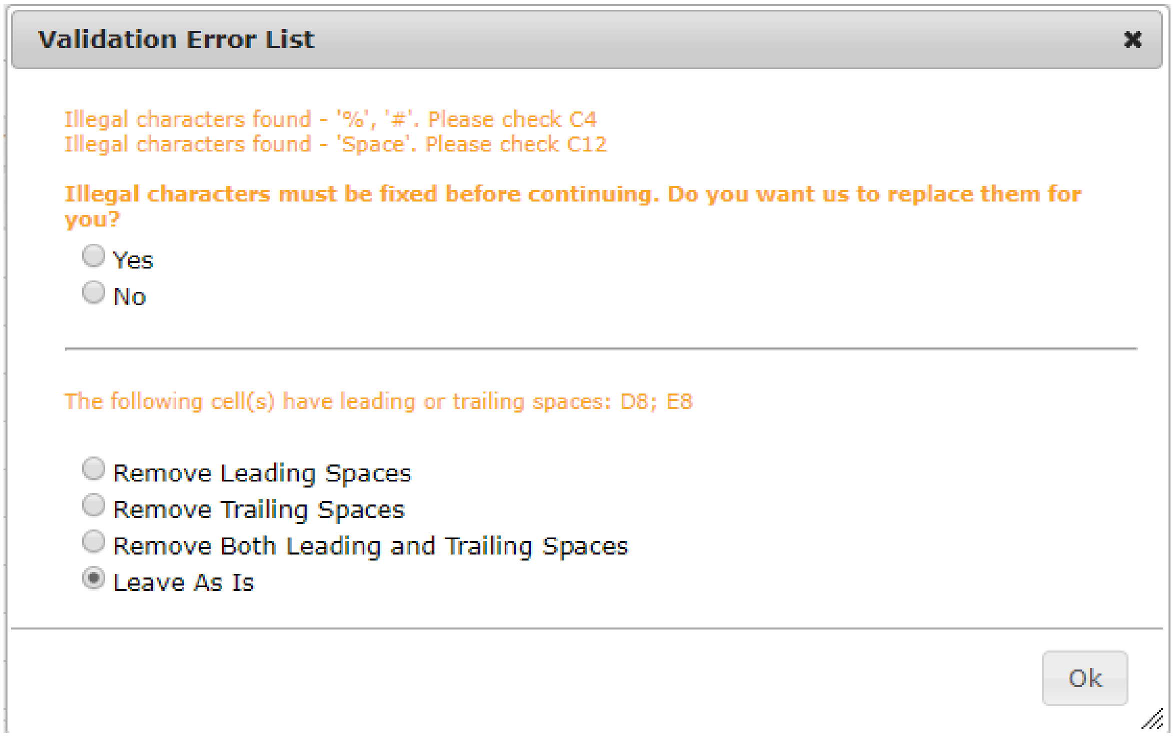
Validate an Asset

To validate the correctness an asset before it is published:

1. Click the green arrow  on the row for any asset. If the asset is correct, you'll receive a confirmation message:

   If the asset contains errors, you'll receive an error message with detail on where you need to edit the asset to make corrections or have CodySoft make the corrections for you, as in this example message

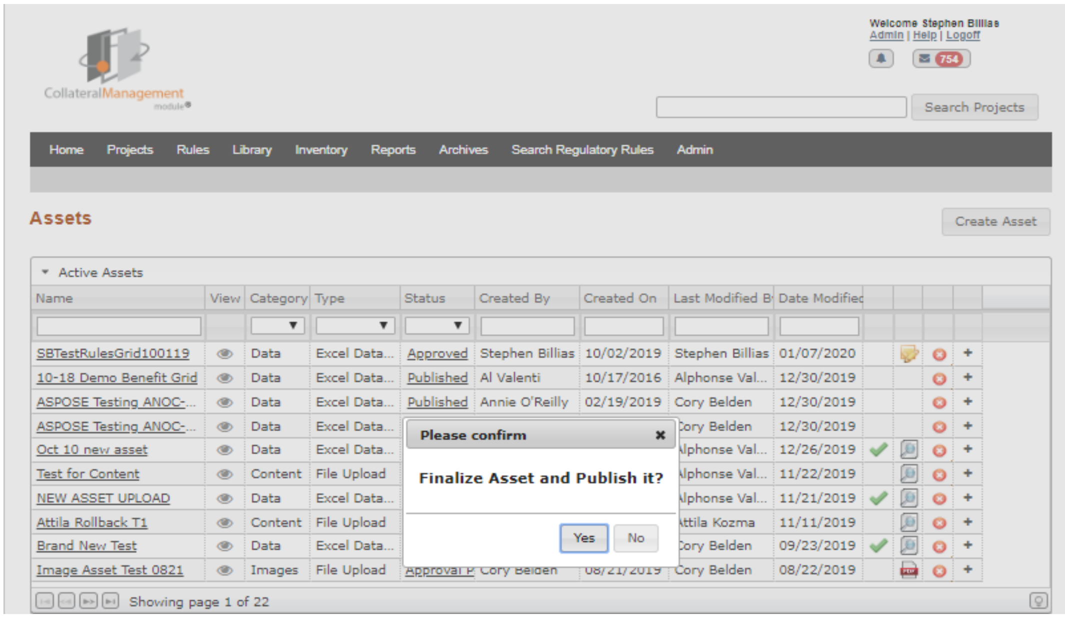


2. Select Yes to have CodySoft correct the errors in column C or select No to fix the errors yourself.
3. Optionally select to remove leading or trailing spaces or both, or leave the trailing spaces
4. Edit the asset if necessary to fix validation errors
5. Select the green validation arrow again to re-validate.
6. Follow the steps to approve or re-approve and publish or re-publish the asset. See *Send an Asset for Review* and *Publish an Asset*.

Publish an Asset

To publish an asset after it has been approved:

1. Click the version icon  on any approved asset. A confirmation dialogue appears:



2. Click **Yes** to publish the asset and make it available for use in projects.

Creating CodySoft® content using IF statements

IF Statement Concept

Using IF statements, document creators and reviewers can see all content embedded in the template, including variations by plan.

NOTE: If you are a CodySoft user already and you want to continue working as you do currently, using an operational grid and assets to store content rather than using IF statements to have the content appear in the template, the system will continue to work that way and you don't have to use the IF functionality.

IF Statement Syntax

To bring content into a CM template, you surround the desired content with a pair of IF/END IF tags that tell the system to insert this content when rule conditions are met. Then you create rules to specify the conditions and apply them just as you would to other elements in a CodySoft template.

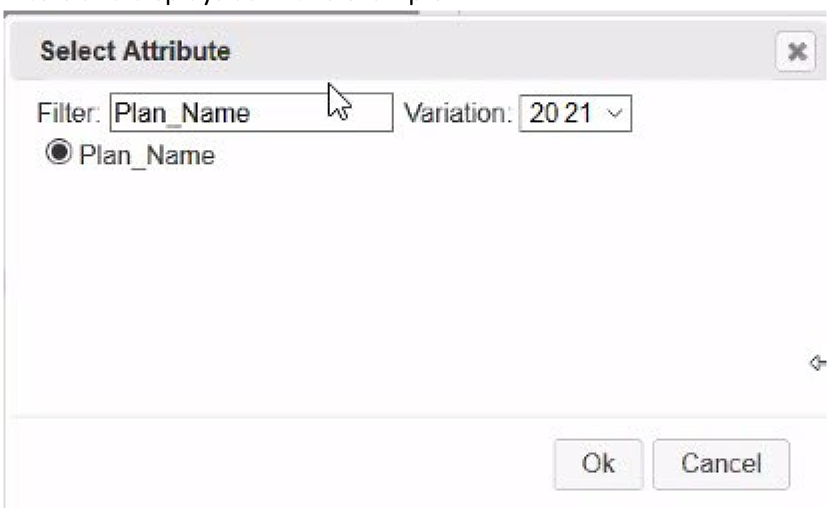
The content within the IF statement pair can be a word or phrase, or it can be a longer, fully formatted piece, for example, a bulleted list or an entire section with a header.

IF statements act like other elements. You can create rules and drag rules onto the IF statements on the template screen, just as you would with any other element. See *Rule Conditions for IF Statements*.

To add content to a template:

1. Add an IF element pair with the syntax [[IF:Rulename]]CONTENT HERE[[ENDIF:Rulename]]
2. Create the Rule. See *Rule Conditions for IF Statements*
3. On the template screen, drag the rule onto the IF element. The [[IF:Rulename]] now reads [[IF:RuleId={xxx}]] and [[ENDIF:somerulename]] is also replaced to read [[ENDIF:RuleId={xxx}]]

   NOTE: Dragging the element or rule brings up a dialog box with the auto-populated with the element name that was used in the drag and drop action so that you don't have to search for it. For example, if you are applying a rule to the element Plan_Name, the dialog filters and displays as in this example:

4. Click **OK** to use the selected element. The mapping must be an exact match or else an error message displays.
5. Click **Commit Changes**

The content in the template does or does not appear in the plans you generate, based on the conditions you set in the rule. See *Rule Conditions for IF Statements*.

Here's an example of two IF statements in a template, with the rules applied, to bring in bulleted lists with different text:

2017 Evidence of Coverage for Generic Medicare Plan 9
Chapter 1. Getting started as a member

- Medicare Part A generally helps cover services provided by hospitals (for inpatient services, skilled nursing facilities, or home health agencies).
- Medicare Part B is for most other medical services (such as physician's services and other outpatient services) and certain items (such as durable medical equipment and supplies).

Section 2.3 What is Pennsylvania Medical Assistance (Medicaid), Ohio Medicaid, North Carolina Medical Assistance (Medicaid) and Kentucky Medicaid?

Pennsylvania Medical Assistance (Medicaid), Ohio Medicaid, North Carolina Medical Assistance (Medicaid) and Kentucky Medicaid are joint Federal and state government programs that help with medical and long-term care costs for certain people who have limited incomes and resources. Each state decides what counts as income and resources, who is eligible, what services are covered, and the cost for services. States also can decide how to run their program as long as they follow the Federal guidelines.

In addition, there are programs offered through Pennsylvania Medical Assistance (Medicaid), Ohio Medicaid, North Carolina Medical Assistance (Medicaid) or Kentucky Medicaid that help people with Medicare pay their Medicare costs, such as their Medicare premiums. These "Medicare Savings Programs" help people with limited income and resources save money each year:

[[IF:RuleId={FBDE}]]

- **Qualified Medicare Beneficiary (QMB):** Helps pay Medicare Part A and Part B premiums, and other cost-sharing (like deductibles, coinsurance, and copayments). (Some people with QMB are also eligible for full Medicaid benefits (QMB+).)
- **Specified Low-Income Medicare Beneficiary Plus (SLMB+):** Helps pay Part B premiums and eligible for full Medicaid benefits. [[ENDIF:RuleId={FBDE}]]

[[IF:RuleId={nonFBDE}]]

- **Specified Low-Income Medicare Beneficiary (SLMB):** Helps pay Part B premiums.
- **Qualifying Individual (QI):** Helps pay Part B premiums.
- **Qualified Disabled & Working Individuals (QDWI):** Helps pay Part A premiums. [[ENDIF:RuleId={nonFBDE}]]

IF Statement Variations

You can create several variations of IF statements in your template.

Nested IF statements

You can have nested IF statements. For example:

January 1 – December 31, 2017

Evidence of Coverage:

Your Medicare Health Benefits and Services and Prescription Drug Coverage as a Member of [[RuleId={AV2016DG}(Plan_Name<2017>)]]^{SM} (HMO SNP)

This booklet gives you the details about your Medicare health care sand prescription drug coverage from January 1 – December 31, 2017. It explains how to get coverage for the health care services and prescription drugs you need. **This is an important legal document. Please keep it in a safe place.**

[[IF:RuleId={smoking1}]]Sample content. **[[IF:RuleId={smoking2}]] More sample content.[[ENDIF:RuleId={smoking2}]]** This is a lot more content for smoking1 that needs to be above and below the smoking2 content. **[[ENDIF:RuleId={smoking1}]]**

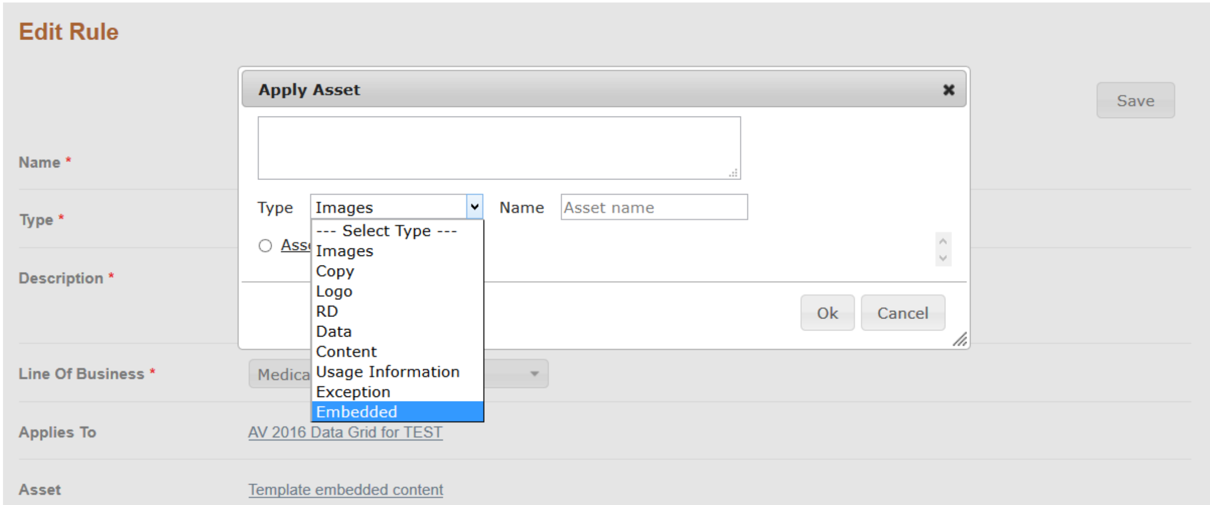
IF statements on a single line

If you need to replace a single word or a short phrase in a sentence instead of inserting a longer piece of content, you can use an IF statement. Here’s an example:

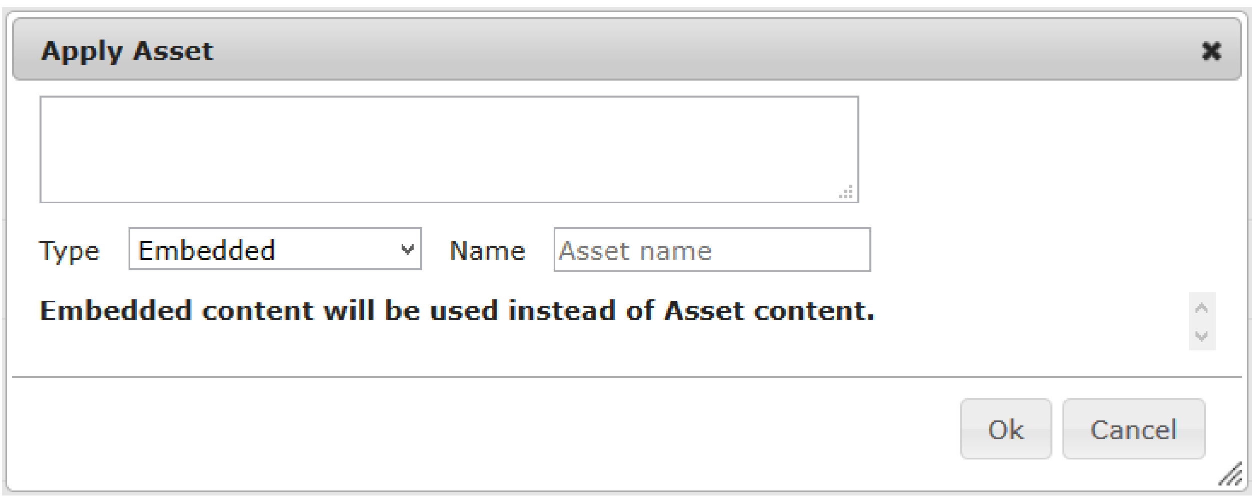
Our plan[[IF:RuleId={FBDE}]]also[[ENDIF:RuleId={FBDE}]] provides coverage for

Rule Conditions for IF Statements

To set up a rule to use content within an IF statement, create the rule as you would any other rule, with the following exception: in the Asset field, instead of selecting the Asset, select Embedded to indicate that the asset is embedded in the template.



The confirmation message displays:



Set the conditions for the rule as you normally would. For example, you can use the rule to identify when to include the asset in a document by Plan Name or Plan ID.

Rules

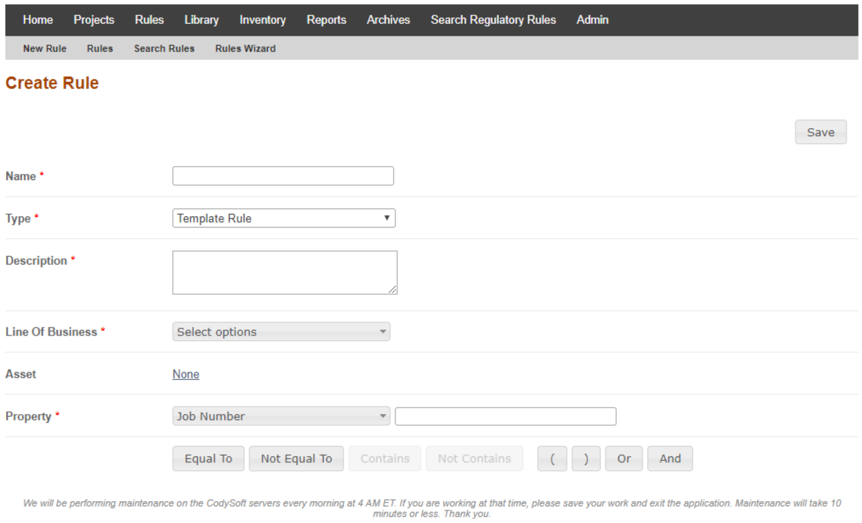
In CodySoft you create rules that you apply to elements in your template to insert data from your data grid, rules grid, operational grid, or assets from your asset application grid. This combination of elements and rules is the method of retrieving information from these grids.

There are two types of rules in CM:

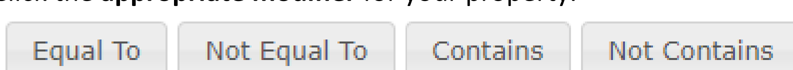
- **Template rules**—are used to bring in data for a specific attribute. There is one template rule for each attribute. See *Creating a Template Rule*.
- **Data Asset rules**—are used to bring in data from a grid for a variety of attributes. For example, you may have a rule that can be used to bring in any number of different attributes from a data grid, or embedded content for a variety of rules in a rules grid. See *Creating a Data Asset Rule*.

Creating a Template Rule

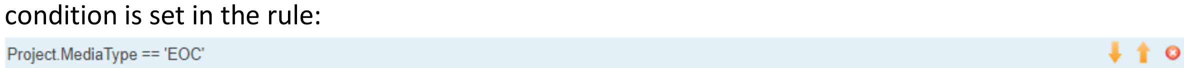
1. From the CodySoft Editor screen in the Templates tab, click **Add Rule**
   The Create Rule screen displays:



2. Enter a rule **Name.** (Use letters and numbers only—do not use any special characters such as dashes)
3. From the Type field drop-down list, select **Template Rule** to use the rule in your template
4. Enter a brief **Description** of the asset
5. Select all lines of business that apply to this asset.
6. In the **Asset** field, leave the default as **None** if this rule does not apply to a specific asset. If the rule applies to a specific asset:
   a. Click **None**
   b. From the Type field, click the asset type, for example, Data. You can filter on the list of available assets by entering the first letter(s) of the asset name in the Name field.
   c. Select the option button next to the to the asset you want to use
   d. Click **OK**. The asset name displays in the Asset field
7. From the first Property field drop-down list, select the property to which the asset applies. The pull-down list displays the default list of **project properties** such as Start Date, Requested By, and Media Type.
8. In the second Property field, enter the condition you want to set for that value for the property, or select it from a drop-down list. For example, if you chose Media Type as the property in the first Property field, select a Media Type that you wish to set as your condition (such as "EOC") from the drop-down list in the second Property field so that Property = "Media Type" and Media Type="EOC".
9. Click the **appropriate modifier** for your property.



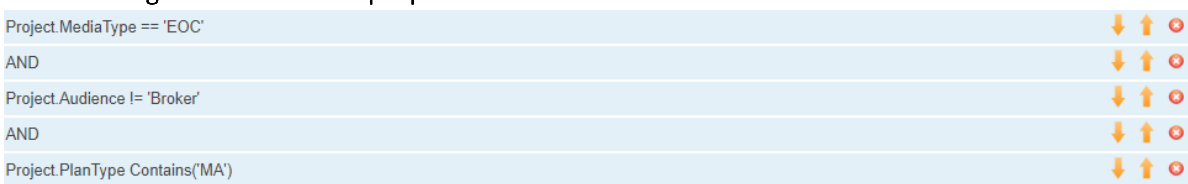
In this example, you would select Equal To. As soon as you chose the modifier, the condition is set in the rule:



10. Optionally **set additional conditions**, using the modifiers provided to construct each additional condition:

For example, you might have a condition that reads: **(**Line of Business = Medicare **AND** Plan Type = PDP**) AND** Media Type = Flyer

11. Build a string of modifiers and properties that create each additional condition.



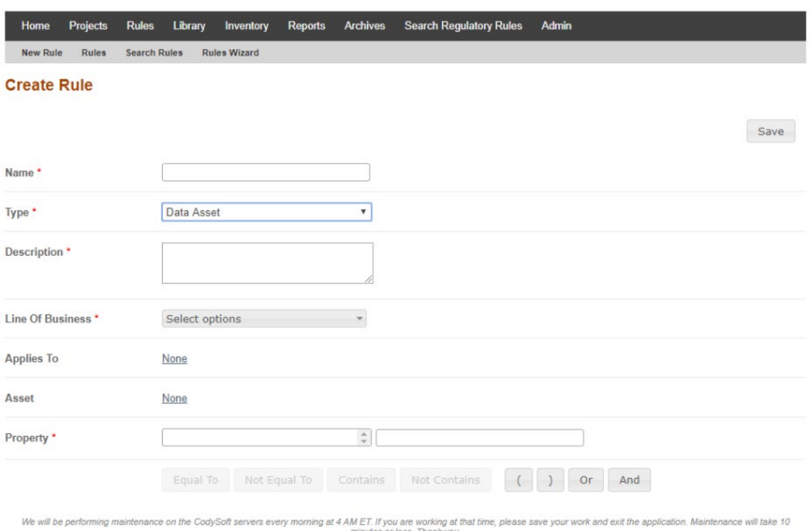
Use the up and down arrows to change the order of your conditions and click the red x circle to delete any conditions you don't want to keep as part of the rule.

12. Click **Save** when you are satisfied with your conditions. Your new rule appears in the list of rules on the Template Editor screen.

Creating a Data Asset Rule

You create data asset rules to apply attributes from data assets to specific plans in your project.

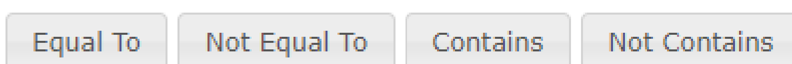
1. From the CodySoft Editor screen in the Templates tab, click **Add Rule**
The Create Rule screen displays:



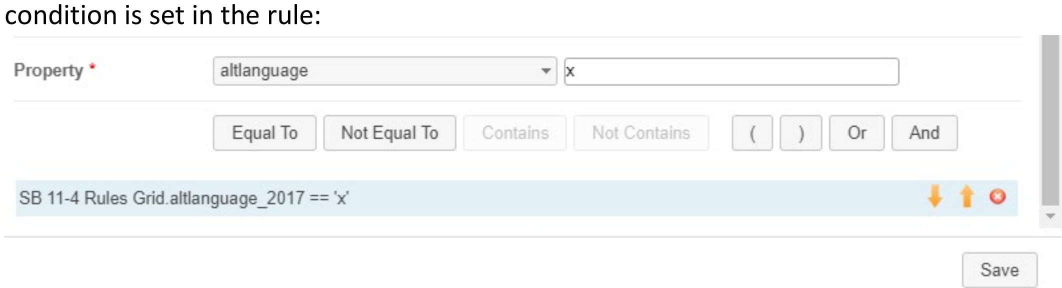
1. Enter a rule **Name.** (Use letters and numbers only—do not use any special characters such as dashes)
2. From the Type field drop-down list, select **Data Asset** to apply the rule against an item in your data grid, operational grid, asset application grid, or rules grid.
3. Enter a brief **Description** of the asset
4. Select all lines of business that apply to this asset.
5. In the **Applies to** field**,** leave the default as **None** if this rule does not apply to a specific asset. If the rule applies to a specific asset like a grid with rules you've created to bring in content within IF statements, follow these steps:
    a. Click **None**

b. From the Category field, click the asset type. In most cases, because you chose Data Asset as the Type, this choice is **Data**.
c. Select the option button next to the to the asset you want to use
d. Click **OK**. The asset name displays in the **Applies to** field

6. In the **Asset** field, leave the default as **None** if this rule does not apply to a specific asset. If the rule applies to a specific asset:
   e. Click **None**
   f. From the Type field, click the asset type, for example, Embedded, which will bring in the variable content that you've placed between IF statements in your template.
   g. Optionally use the Name field as a filter to reduce the number of assets in the list. For example, if you enter Bene in the Name field, only assets with Bene in the name display
   h. If you are applying your rule to an asset type instead of using embedded content, select the option button next to the to the asset you want to use
   i. Click **OK**. The asset name or category displays in the **Asset** field
   j. From the first Property field drop-down list, select the property to which the asset applies. The pull-down list displays the list of **attributes** in the data asset that you entered in the Applies To field. For example, if you are creating a rule that uses a rules grid in Applies To, the list will be of the rules in the grid. See *Creating a Rules Grid*.
   k. Use the second Property field to set the conditions for your rule to follow. For example, if you are using a rules grid in Applies To and you chose "altlanguage," as the property, populate the second property field with whatever marker you used on your rules grid to indicate which plans this rule applies to, for example, you may use a lowercase "x" in the columns for the plans for which this rule applies.
   l. Click the **appropriate modifier** for your property.



   In this example, you would select Equal To. As soon as you chose the modifier, the condition is set in the rule:



   m. Optionally **set additional conditions**, using the modifiers provided to construct each additional condition.

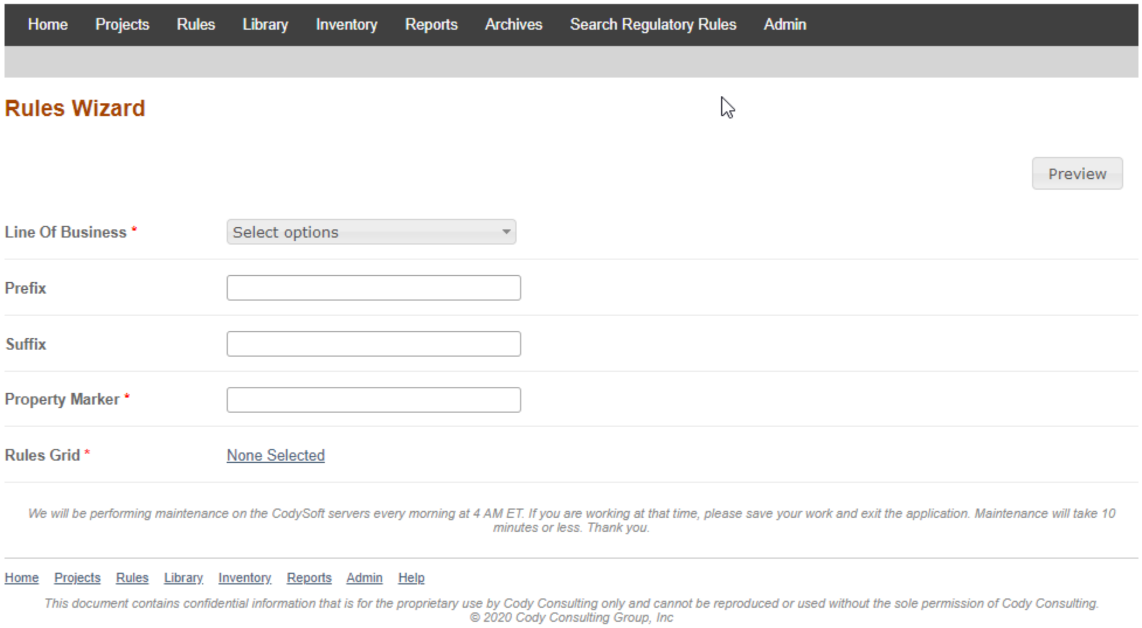
7. Click **Save** when you are satisfied with your conditions Your new rule appears in the list of rules on the Template Editor screen.

NOTE: From the Rules tab you can copy rules using the Copy to clipboard icon  at the end of each Rule row. See *Add Rules to Project*.

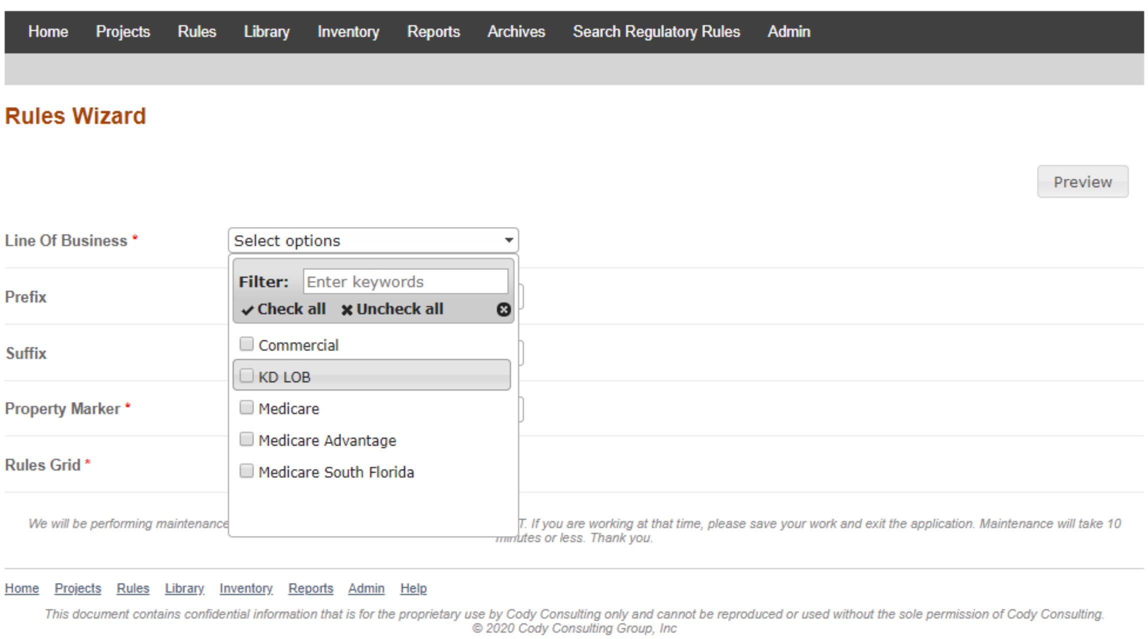
Using the Rules Wizard

You can use the Rules Wizard to create an entire set of new rules automatically.

1. From the Rules tab, select **Rules Wizard**. The Rules Wizard screen displays:



2. Select one or more **lines of business** from the dropdown list

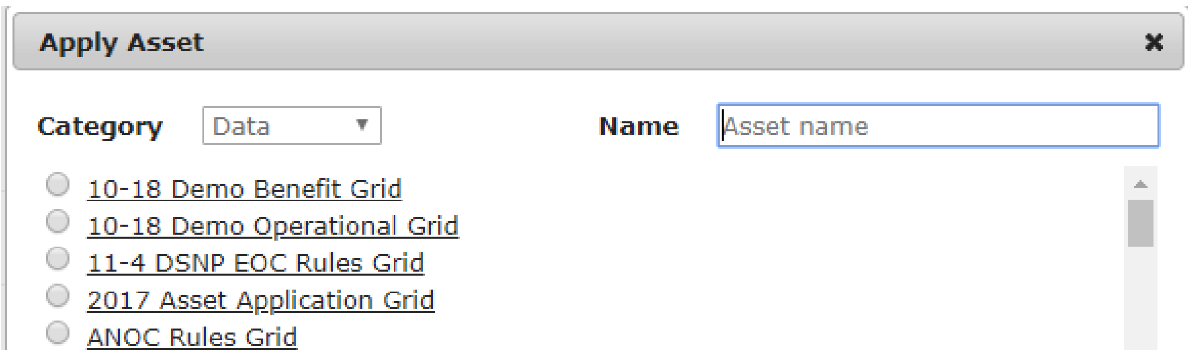


3. Optionally enter a **Prefix** to prepend to all the rule names in the rules grid you create. For example, you might want to identify all the rules in this grid by the prefix ABC.
4. Optionally enter a **Suffix** to append to all the rule names in the rules grid you create, for example, if you want to identify the rules in this grid by the suffix of the plan year.

5. Select a **Property Marker** for your rules grid. This is the character you use in the plan columns of the rules grid to specify whether the rule applies to that plan. In this example, the lower case "x" is used:

	A	B	C	D	E	F
1			PlanName	001(H1234)	002(H1234)	003(H1234)
2			Variant	2020	2020	2020
3			**Attribute**	OR and WA	OR and WA	Oregon
4			Plan_Name	Medicare Advantage Gold Plus	Medicare Advantage Silver	Medicare Advantage Bronze
5	**Rule description**	**Location in model**	**Rule**			
6	if plan meets 5% alternate language threshold	title page (ANOC and EOC)	altlanguage	x		x
7	if plan has medical deductible in current year AND/OR will have a medical deductible next year	ANOC summary of important costs chart	ANOCmeddeductible			x

6. In the Rules Grid field, click **None Selected**. The Apply Asset dialog displays:



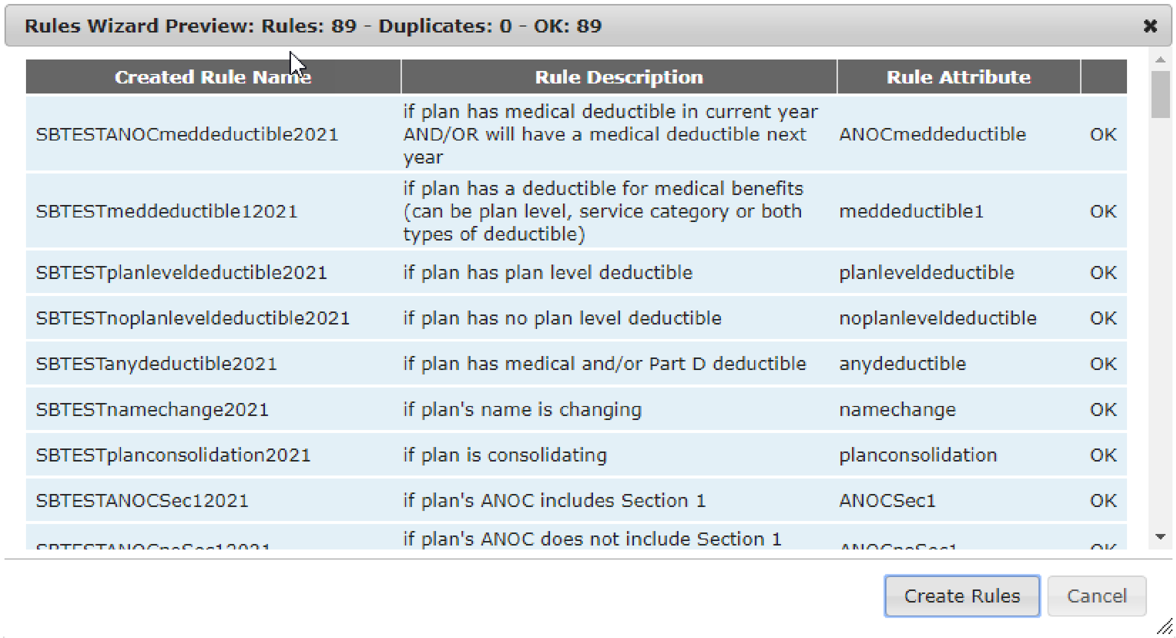
The Rules grid must be a published data asset in the Asset Library. See *Rules Grid Format* and *Adding a New Asset to the Library*.

7. Select the rules grid you want to use as your template for creating the new rules grid.

8. Click **OK**.

NOTES: The rules wizard is case sensitive to prevent you from creating duplicate rules. Also, the wizard will error if there are spaces or disallowed special characters in a Prefix of Suffix, or if you don't enter values for any of the mandatory fields marked with a red asterisk (*).

9. Click **Preview** to preview your newly created rules. The Rules Wizard Preview screen displays:

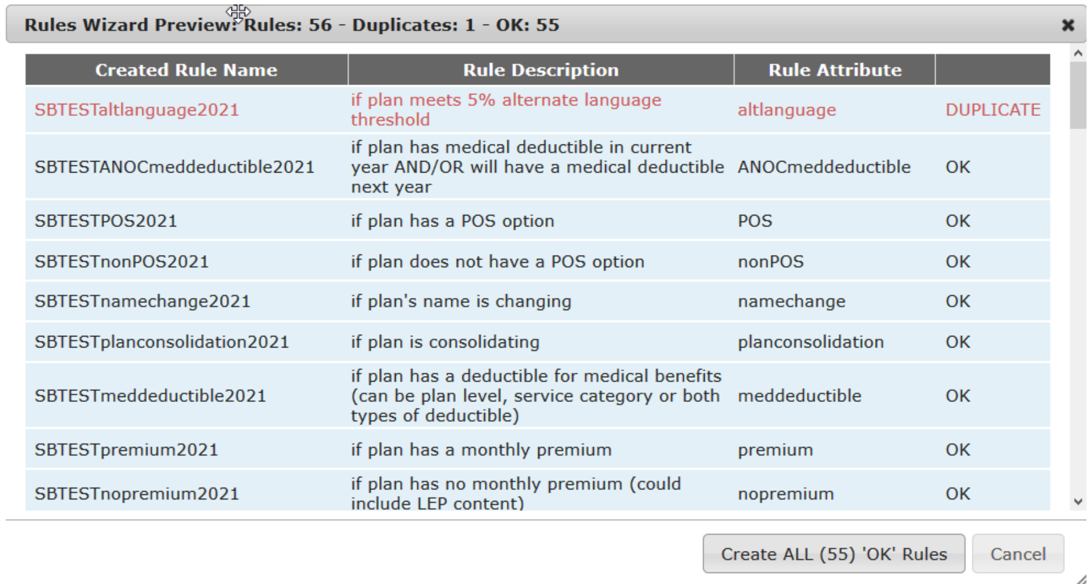


Rules Wizard Preview: Rules: 89 - Duplicates: 0 - OK: 89

Created Rule Name	Rule Description	Rule Attribute	
SBTESTANOCmeddeductible2021	if plan has medical deductible in current year AND/OR will have a medical deductible next year	ANOCmeddeductible	OK
SBTESTmeddeductible12021	if plan has a deductible for medical benefits (can be plan level, service category or both types of deductible)	meddeductible1	OK
SBTESTplanleveldeductible2021	if plan has plan level deductible	planleveldeductible	OK
SBTESTnoplanleveldeductible2021	if plan has no plan level deductible	noplanleveldeductible	OK
SBTESTanydeductible2021	if plan has medical and/or Part D deductible	anydeductible	OK
SBTESTnamechange2021	if plan's name is changing	namechange	OK
SBTESTplanconsolidation2021	if plan is consolidating	planconsolidation	OK
SBTESTANOCSec12021	if plan's ANOC includes Section 1	ANOCSec1	OK
	if plan's ANOC does not include Section 1		

a. If the Preview window indicates that all rules are OK, click **Create Rules**. The rules are created and added to the list of rules.

b. If the Preview window identifies duplicates already created in CM among the rules that the wizard is about to create, the Create Rules button changes to offer the ability to create just those rules that were validated as “OK”:


Rules Wizard Preview: Rules: 56 - Duplicates: 1 - OK: 55

Created Rule Name	Rule Description	Rule Attribute	
SBTESTaltlanguage2021	if plan meets 5% alternate language threshold	altlanguage	DUPLICATE
SBTESTANOCmeddeductible2021	if plan has medical deductible in current year AND/OR will have a medical deductible next year	ANOCmeddeductible	OK
SBTESTPOS2021	if plan has a POS option	POS	OK
SBTESTnonPOS2021	if plan does not have a POS option	nonPOS	OK
SBTESTnamechange2021	if plan's name is changing	namechange	OK
SBTESTplanconsolidation2021	if plan is consolidating	planconsolidation	OK
SBTESTmeddeductible2021	if plan has a deductible for medical benefits (can be plan level, service category or both types of deductible)	meddeductible	OK
SBTESTpremium2021	if plan has a monthly premium	premium	OK
SBTESTnopremium2021	if plan has no monthly premium (could include LEP content)	nopremium	OK

Create ALL (55) 'OK' Rules   Cancel

c. If none of the rules to be created passes validation (all are duplicates) then the Create Rules button is greyed out and you can only click **Cancel**.

Naming a Rule for Embedded Content Using IF Statements

Rule Name and Beginning Syntax

Rule Name

CodySoft suggests that you use the following naming convention when creating rules. The Rule Name is a combination of **two-digit plan year** (optional) + **plan type abbreviation (see below)** + the **rule name** from Column C of the rules grid.

Plan Type Abbreviations:

Plan Type	Abbreviation
HMO MAPD	H2
HMO MA Only	H1
PPO MAPD	P2
PPO MA Only	P1
DSNP	Dx
PDP	Rx
EGWP	Ex
PFFS	Px

Use the same beginning syntax for all rules associated with each Rules Grid.

Beginning Syntax = **two-digit plan year** + **plan type abbreviation**

In this example, the beginning syntax for Generic 2018 HMO MAPD Rules Grid will be **GW18H2.**

Follow the **two-digit plan year** (optional) + **plan type abbreviation** with the rule name from Column C of the rule grid to create the full syntax for each rule name.

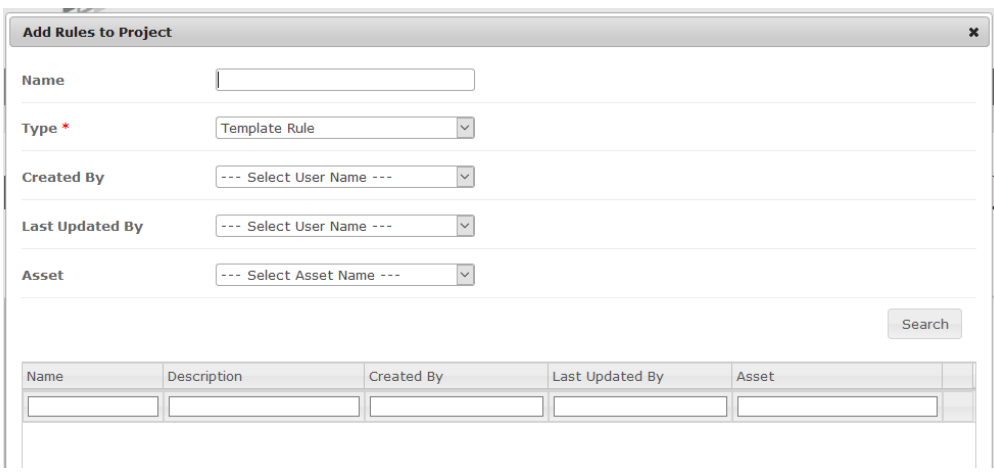
NOTE: Do not use spaces or special characters in your rule name.

Add Rules to Project

Add Rules to Project is useful if you are adding rules that were created by someone else or for another project and you want to include them in your project.

If you are a project manager, you can add previously created rules to your project. See *Rules* for instructions on how you can create rules in your project.

1. From the Rules tab of your project click **Add Rules to Project**. The **Add Rules to Project** screen displays:

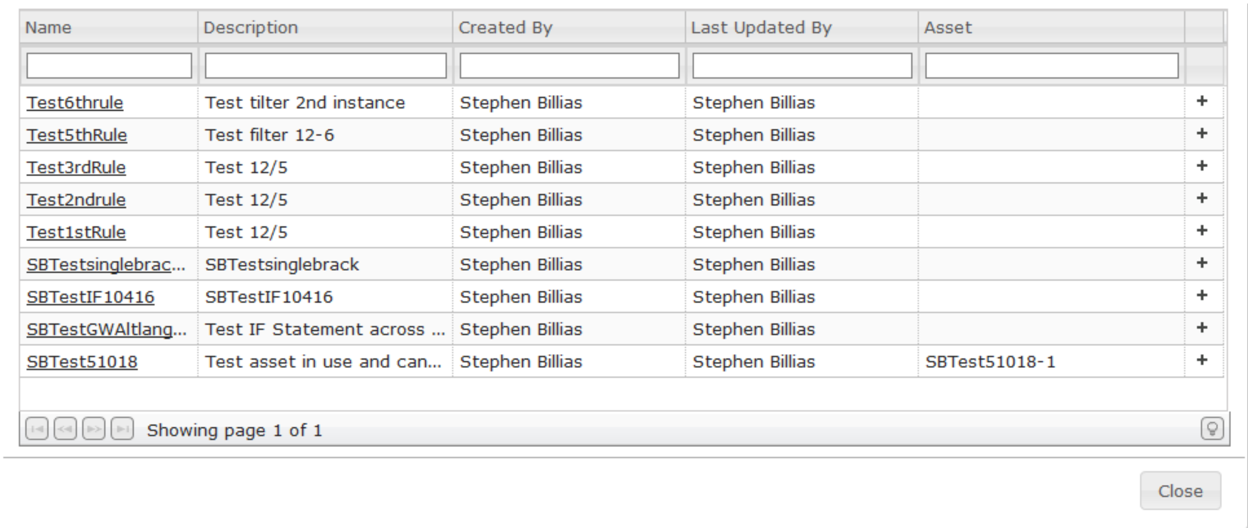


2. Filter your search criteria using the fields provided:

Name:	Enter the rule name if known
Type:	Select Template Rule (for Data grid rules) or Data Asset (for IF Statements). See *Rules*.
Created By:	Select a user name to search for rules created by that person
Last Updated By:	Enter a user name to search for rules edited by that person most recently
Asset:	Select asset associated with the rule from a dropdown list of all assets

3. Click **Search**

Your search results display in the table below:



Name	Description	Created By	Last Updated By	Asset	
Test6thrule	Test tilter 2nd instance	Stephen Billias	Stephen Billias		+
Test5thRule	Test filter 12-6	Stephen Billias	Stephen Billias		+
Test3rdRule	Test 12/5	Stephen Billias	Stephen Billias		+
Test2ndrule	Test 12/5	Stephen Billias	Stephen Billias		+
Test1stRule	Test 12/5	Stephen Billias	Stephen Billias		+
SBTestsinglebrac...	SBTestsinglebrack	Stephen Billias	Stephen Billias		+
SBTestIF10416	SBTestIF10416	Stephen Billias	Stephen Billias		+
SBTestGWAltlang...	Test IF Statement across ...	Stephen Billias	Stephen Billias		+
SBTest51018	Test asset in use and can...	Stephen Billias	Stephen Billias	SBTest51018-1	+

4. Click the **plus sign (+)** at the end of the row to add a rule to your project. When you have added all rows you want to add, click **Close**. Your rules display on the Rules tab in the project and are available for use in the Rules column on the Template Editor screen.

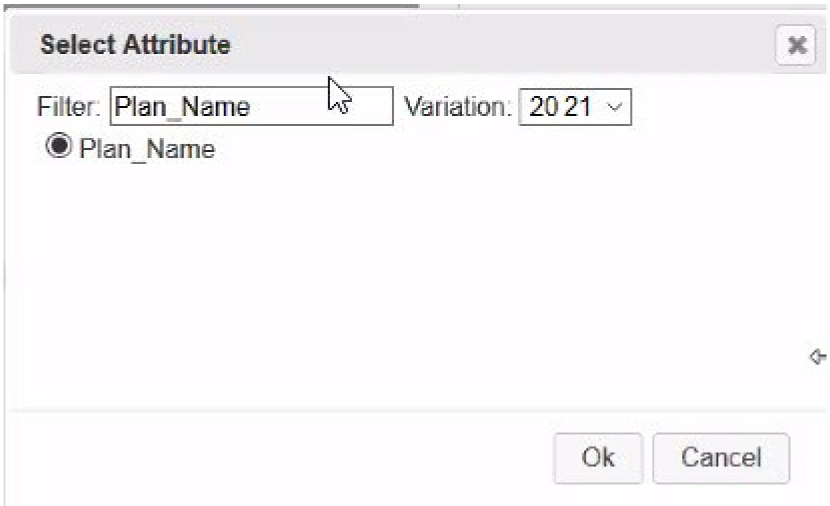
Using Rules

6. From the dashboard, select the project that contains the Cody Editor template you want to edit
7. From the home page of the individual project, click the **Templates** tab
8. From the list of templates, click the **Name** of the template you want to edit**.** The template appears in a three-column format:

Page 1 of the current template in the left column	The list of Elements on the current page in the center column	The list of Rules in the right column.

9. Navigate to the page with the element to which you want to apply a rule
10. Click and drag the rule from the right column onto the element in the center column or drag the element from the center column onto the rule in the right column. Dragging works the same in either direction. You can also filter by typing the first letter(s) of the rule name in the blank box provided, to see a shorter list of rules starting with those letters.
NOTE: Dragging the element or rule brings up a dialog box with the auto-populated with the element name that was used in the drag and drop action so that you don't have to

search for it. For example, if you are applying a rule to the element Plan_Name, the dialog filters and displays as in this example:



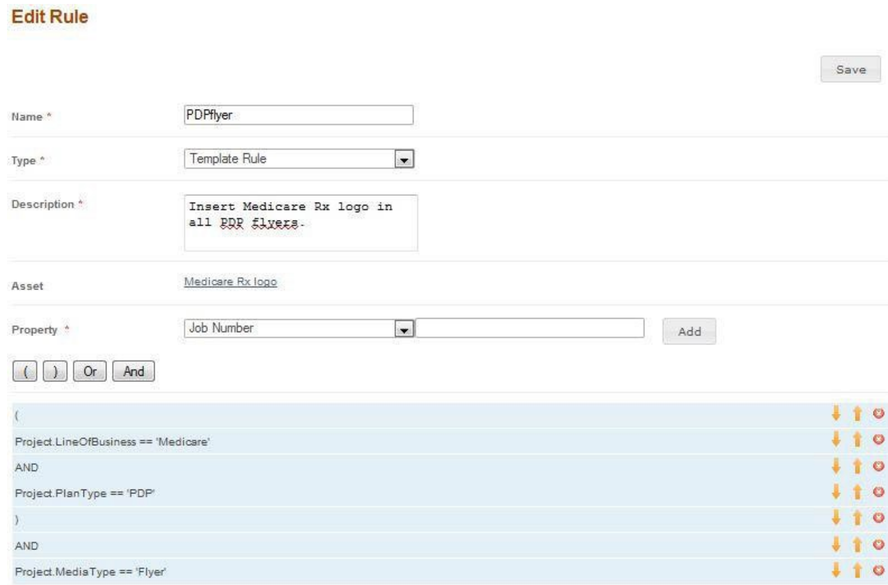
11. Click **OK** to use the selected element. The mapping must be an exact match or else an error message displays.
12. Click **Test the Template**.
13. Verify that the rule has been applied to the element.
14. Click **Commit Changes** to save your changes. Click **Undo** if you want to revert to the template's state before you made the changes, for example if you find an error in the way you applied a rule that you don't want to commit to the template

Inserting a rule in a document template

1. On the template editor screen, drag the rule to the appropriate variable element listed in the "Elements" column

   NOTE: Dragging the element or rule brings up a dialog box with the auto-populated with the element name that was used in the drag and drop action so that you don't have to search for it. The mapping must be an exact match or else an error message displays.
2. Click **OK**. The rule is inserted in the document.
3. Click **Commit Changes**.
4. Click **Test the Template**. and select the plan and output type for the test template. The template is generated with the new rule.

   Example: A template rule states that the Medicare Rx logo (**Asset**) is inserted into the template if both the project's Line of Business = Medicare AND its Plan Type = PDP, AND if its Media Type = Flyer (**Properties**).



Sample of Complex Rule

Searching for a rule

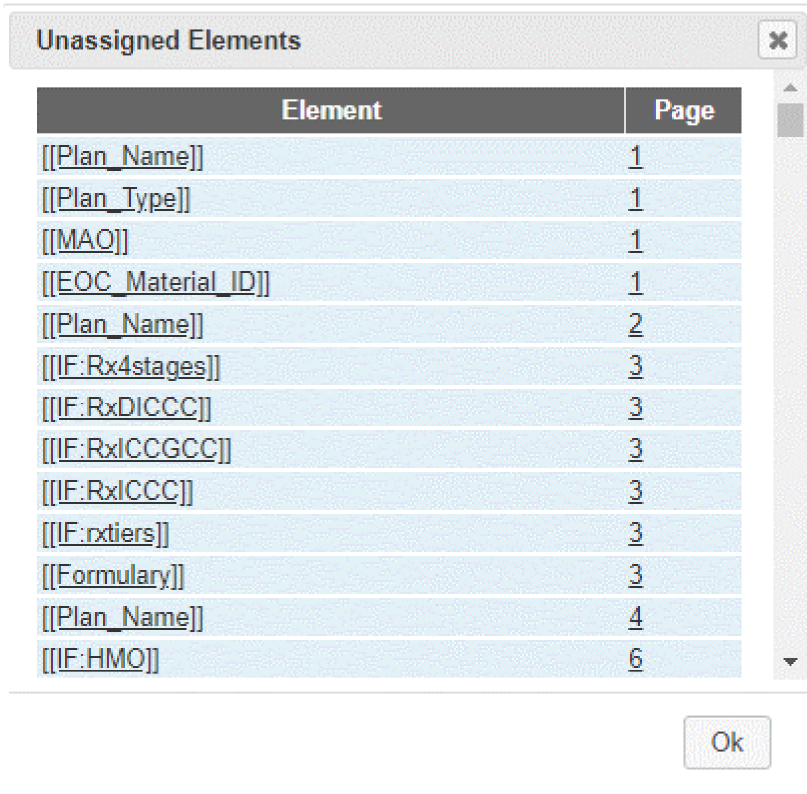
1. From the dashboards, select **Rules**
2. From the Rules choices, select **Search Rules**.
   a. **Name** – Enter as much as you know of the rule's name.
   b. **Type** – Template Rule.
   c. **Created By** – Select the User Name of the person who created the rule from the dropdown list
   d. **Last Updated By** – Select the User Name of the person who last updated the rule from the dropdown list
   e. **Asset** – Select the associated Asset Name from the dropdown list.
3. Click **Search** (on the bottom right side of the screen).

Viewing Unassigned Elements

You can run a report that will identify all elements in that template that don't have rules assigned to them. This report allows you to quickly identify and resolve any issues with unassigned elements.

1. From the Edit Template screen, click the **View Unassigned Elements** icon:

   The Unassigned Elements dialog box opens.



Unassigned Elements

Element	Page
[[Plan_Name]]	1
[[Plan_Type]]	1
[[MAO]]	1
[[EOC_Material_ID]]	1
[[Plan_Name]]	2
[[IF:Rx4stages]]	3
[[IF:RxDICCC]]	3
[[IF:RxICCGCC]]	3
[[IF:RxICCC]]	3
[[IF:rxtiers]]	3
[[Formulary]]	3
[[Plan_Name]]	4
[[IF:HMO]]	6

Ok

2. Click any element name or page number in the list to navigate to the page number of the element you want to work on or click OK to close the list.

3. Click and drag the rule from the right column onto the element in the center column or drag the element from the center column onto the rule in the right column. Dragging works the same in either direction.

   NOTE: Dragging the element or rule brings up a dialog box with the auto-populated with the element name that was used in the drag and drop action so that you don't have to search for it. The mapping must be an exact match or else an error message displays.

4. Click **OK**.

When you have identified all unassigned elements and assigned rules to them, you are ready to test the template.

Adding, Viewing, and Editing Templates

Document templates and versions are created using the **Document Editor**, CodySoft®'s built-in word processing software. With the **Document Editor**, you can also apply rules to templates, and merge data files with versions. These documents are stored in the project record for easy access.

Adding a Word Document as a CodySoft® Editor Template

1. In the project record, click the **Templates** tab.
2. Click the **Add Template** link.

   a. **Name** – Enter the template's name.

   NOTE: All template names are limited to 55 characters. If you enter a template name with more than the maximum number of characters, you will be prompted to enter a new name. Special characters like "$" and "%" are allowed in template filenames, but not in the name of the file you are uploading.

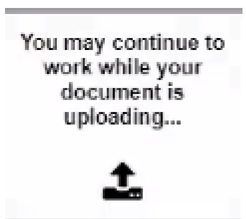
   b. **Type** – Select **Word** from the drop-down list.

   c. Click **Browse**.

   d. Select the file you want to upload. Click **Open**.

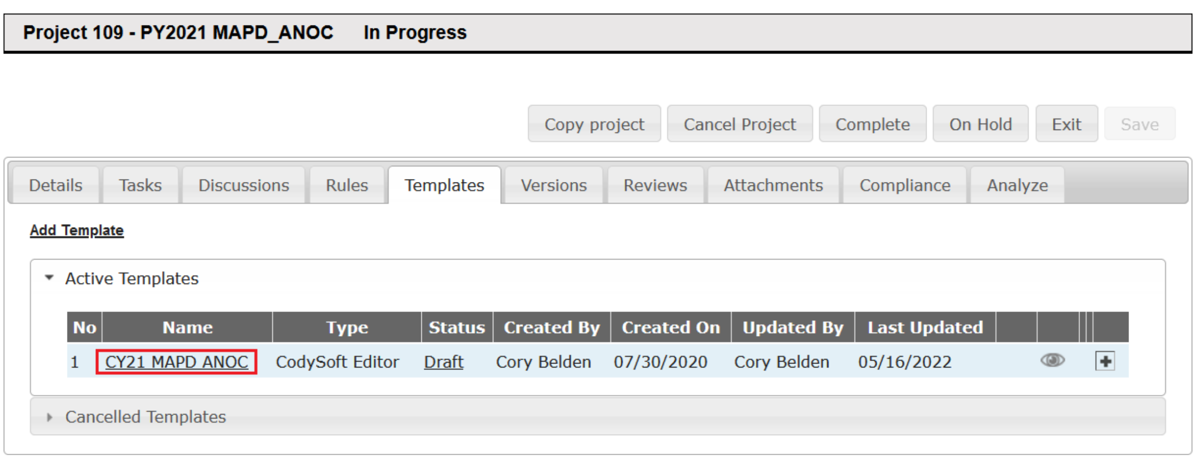
   e. Click **OK**. Template Parsing begins. You will be notified once the template has been parsed.

   NOTE that a message indicates you can continue to work while the document is parsing.



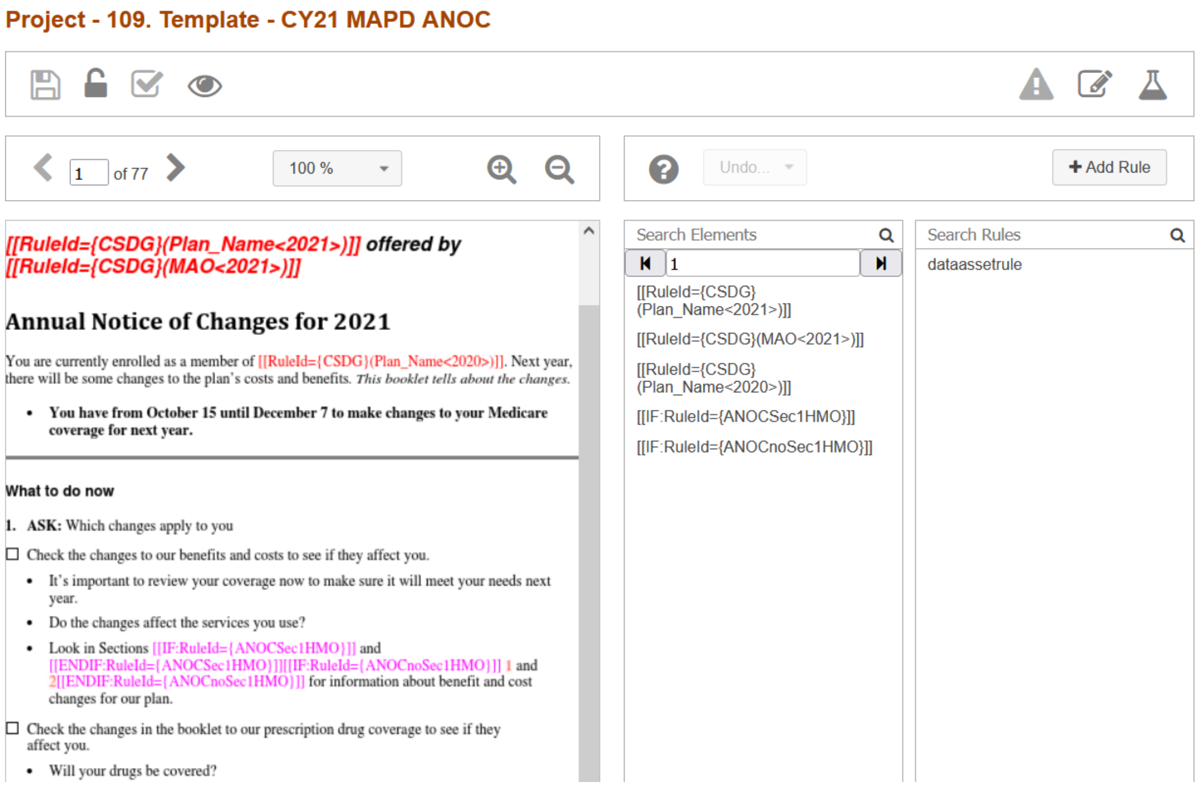
Viewing or editing a CodySoft® Editor Template

1. From the project's Templates tab, click the template's name link to access the Template Editor screen.



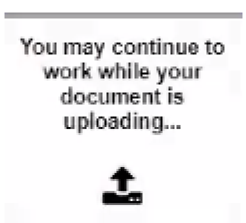
NOTE: Once you click this link, this template is now locked to other users. After you have completed the review or edit process, you must click Unlock Template and Return to Project.

The template editor screen displays:



2. Click the Edit Template icon  to edit the underlying Word Document.
3. Click the save disk icon in Word and close the document to save the document back to CodySoft®. The template reparses to capture changes made to the document. You are notified when the document is available again.

   NOTE that a message indicates you can continue to work while the document is parsing.



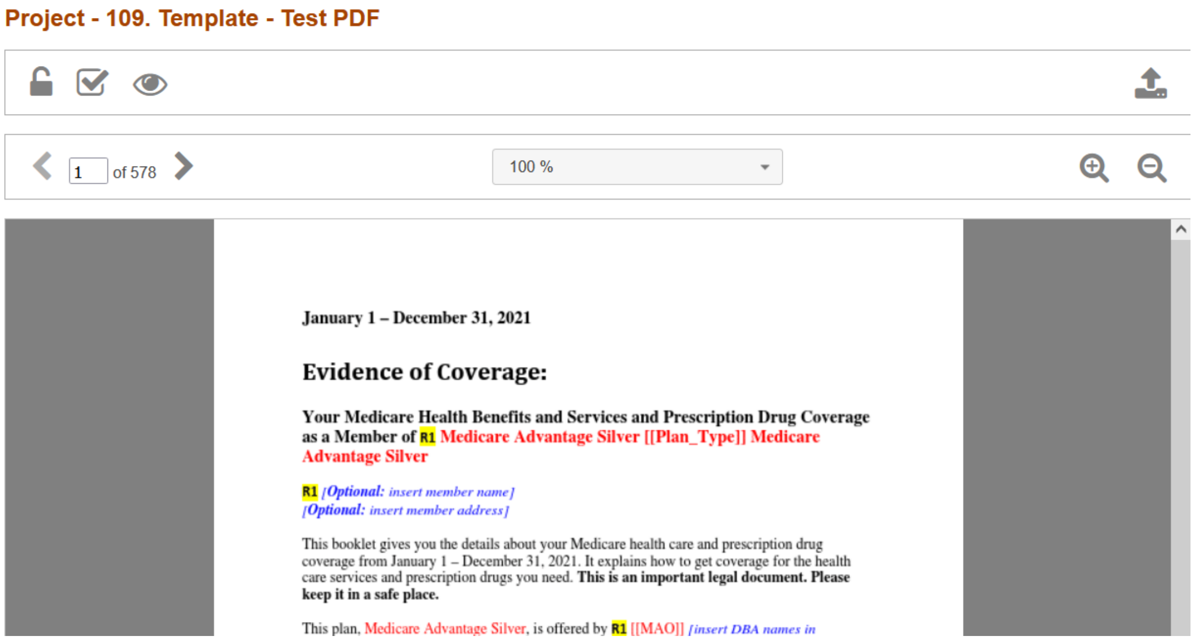
Adding a File Template

1. In the project record, click the **Templates** tab.
2. Click the **Add Template** link.
   a. **Name** – Enter the template's name.
   b. **Type** – Select **File** from the drop-down list.
   c. **Browse** – Browse to upload your file from your local drive.
   d. Click **OK**.

Editing a File Template

1. Click the template name to open the file template screen.

NOTE: Once you open the File template document, this document will only be available in Read-Only view for other users. To unlock this template, you must save and close the file.



2. To make changes to a File Template, you can replace the existing template with an updated copy by clicking the “Upload Replacement Template” icon .

Adding an Excel Template

1. In the project record, click the **Templates** tab.
2. Click the **Add Template** link.
   a. **Name** – Enter the template’s name.
   b. **Type** – Select **Excel** from the drop-down list.
   c. Click **OK**.

Editing an Excel Template

1. Click the icon to open the Excel file.
   Note: Once you open the Excel template document, this document will only be available in Read-Only view for other users. To unlock this template, you must save and close the Excel document.
2. Make edits to your Excel document.
3. Click **Save** in Excel.
4. Close the Excel Document. Your changes are saved and uploaded to the CodySoft® server.

Reviews and Schedules

Review Process for End Users

If you are in the end user role, 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.

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:

You may begin 17 - New review task today for 285 - Test

A admin@codysoft.com
To Cory Belden

CollateralManagement
module®

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

Request Details:

Project #: 285

Project Name: Test

Tenant: 1

Task: New review task today

Description: Did I get this notification?

Planned Start Date: 2022-05-17

Due Date: 2022-05-17

Link to project: OPEN

1. From the email, click **Open** from **Link to Project**
2. 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

Tasks - Active Reviews

Template	Review Round	Name	Start Date	End Date	Edit Method	
DocumentAnnotateTool 3-29-17	1	DocumentAnnotateTool	3/28/2017	4/3/2017	Markup Tool	☐

Tasks - Completed Reviews

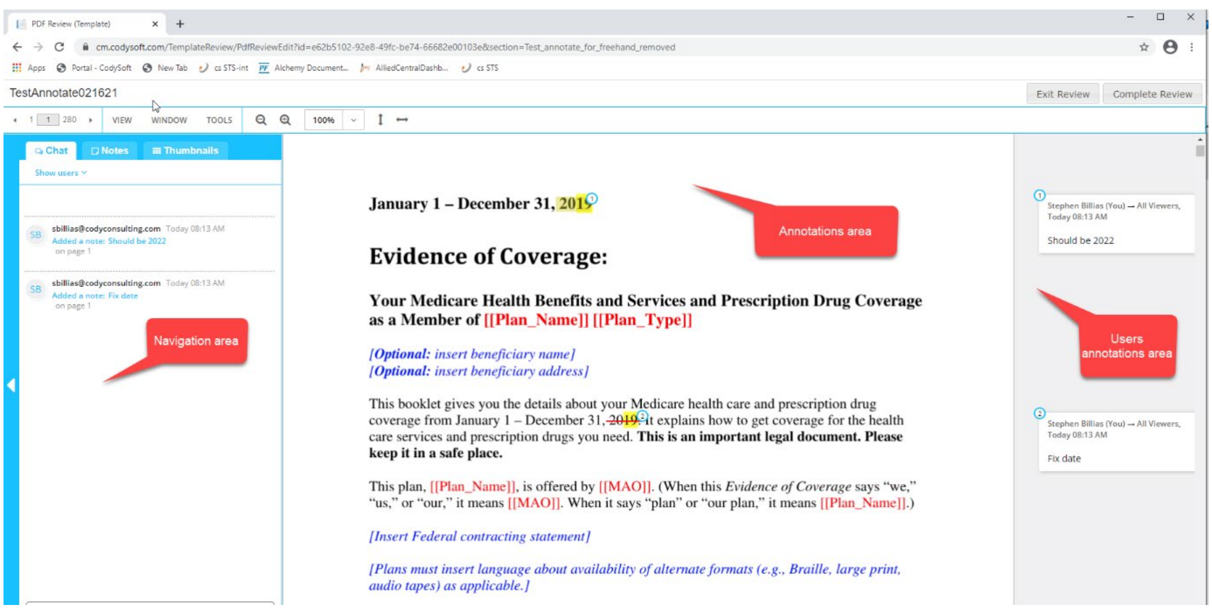
3. In the Edit Method column, click the Markup Tool if a Annotate review (or click Edit File if an Edit File review) to open the file for commenting.

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:

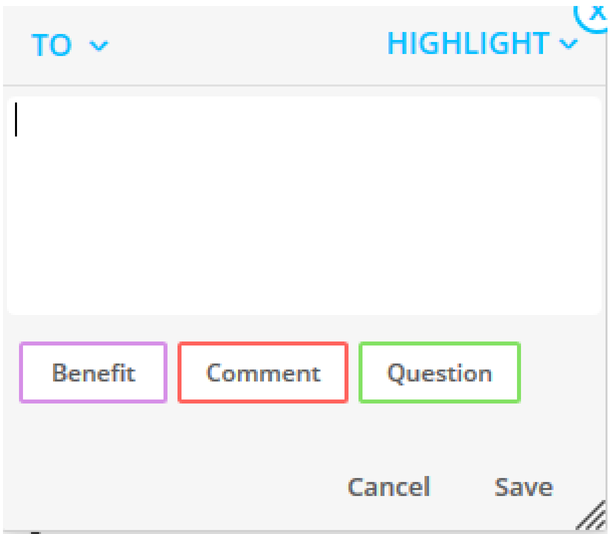
- **Annotations area** – The center area where you add annotations
- **Users Annotations area** – On the right, where all annotations made to the document are listed.
- **Navigation area** – On the left, available by clicking the white arrow to expand it, where you can navigate through the document, 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.
5. 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

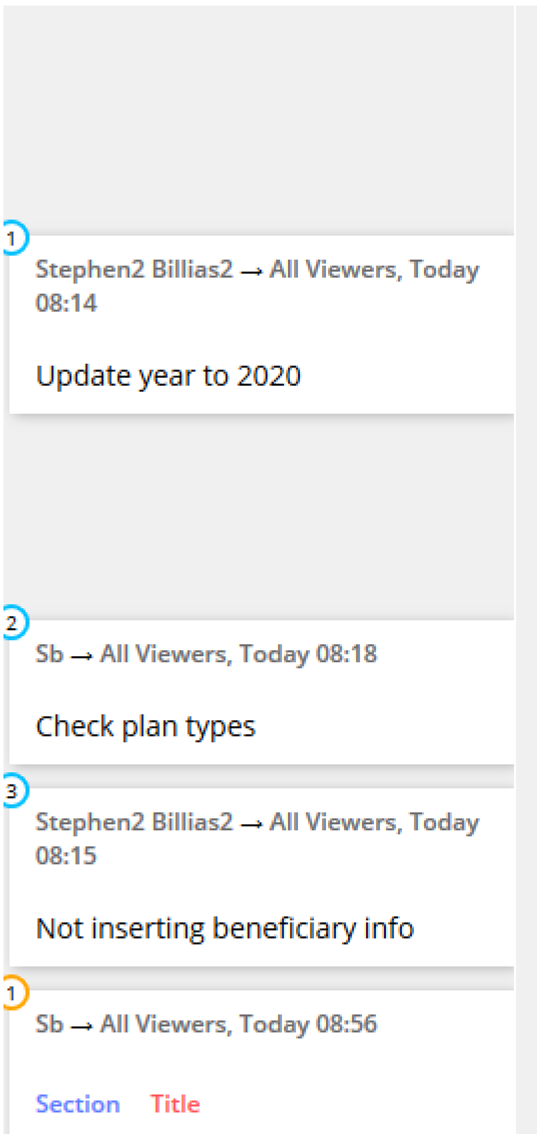
  - Questions in green

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

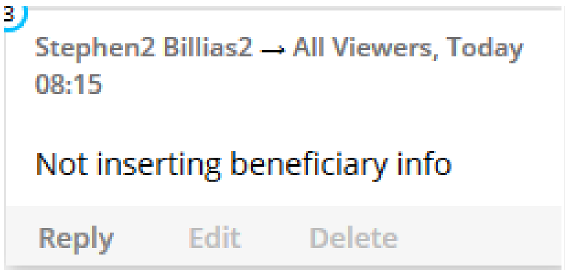
The tool uses your last selection of annotation type for the next annotation. You can change the type when you make the next annotation.

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

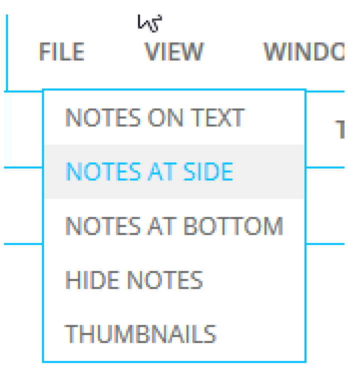
Navigation

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.

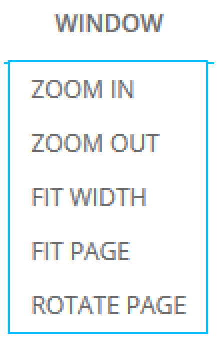
View menu

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.



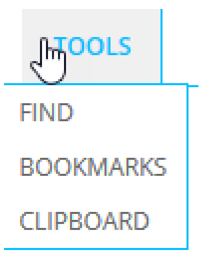
Window menu

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.

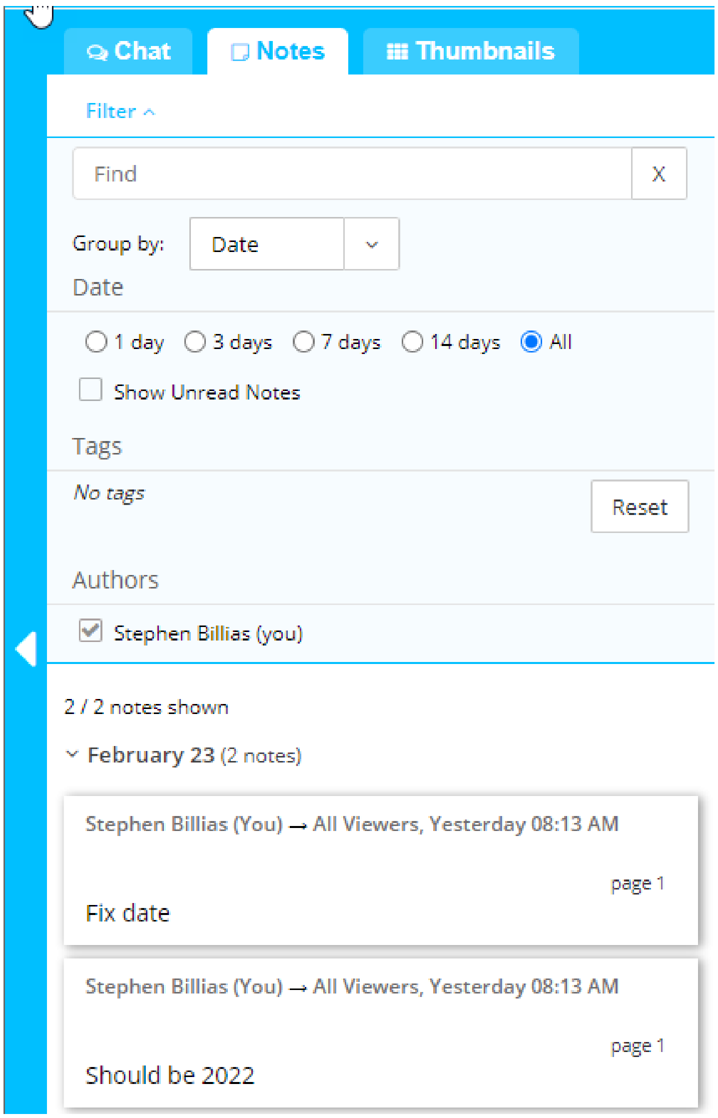


Chat

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.

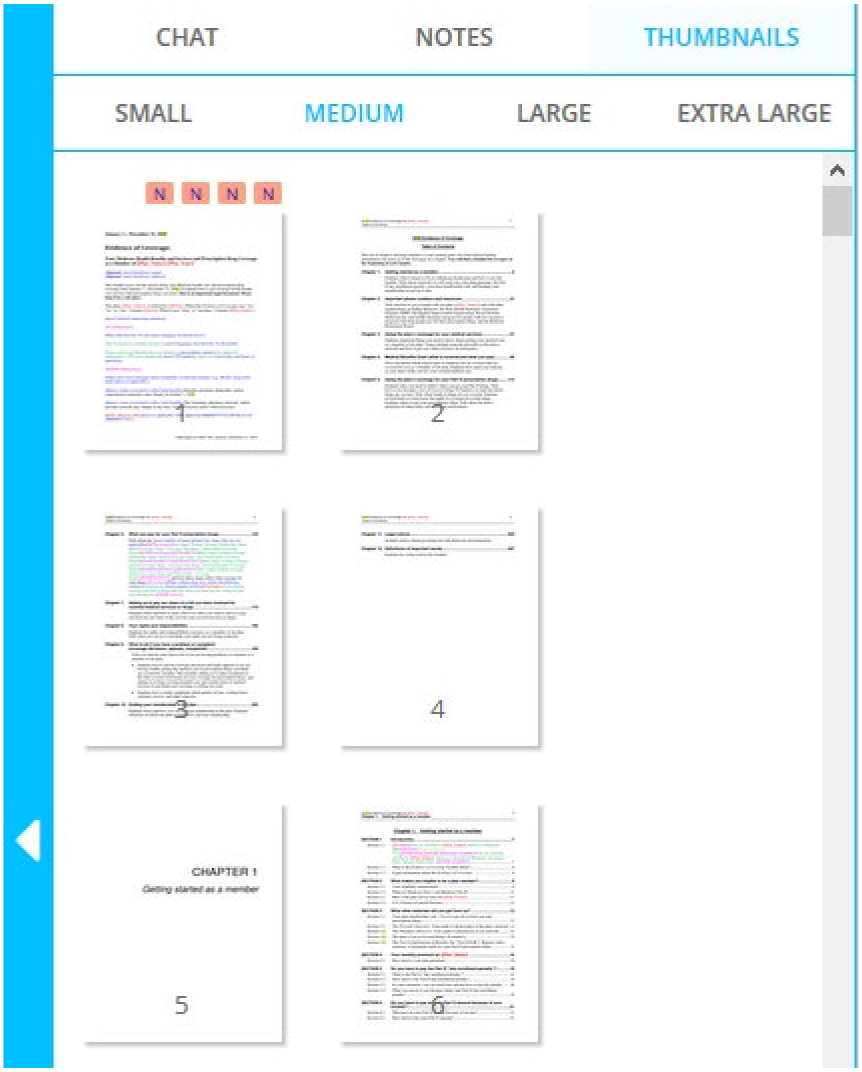
Notes

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.



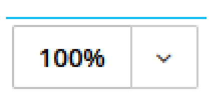
Thumbnails

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

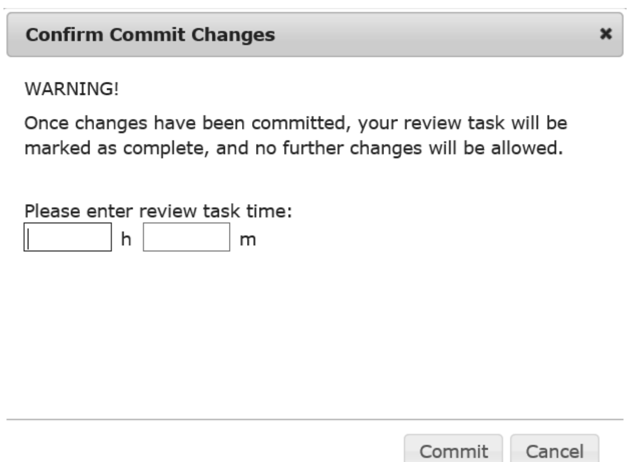
- The horizontal double-arrow positions the entire annotations area horizontally as a single page

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:



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.

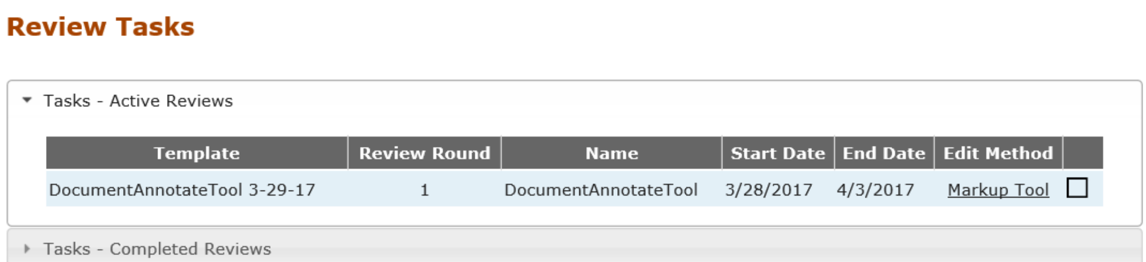
NOTE: If more than one reviewer is assigned an Edit File review, the file is locked by the first person who opens it; only one person can edit the file at a time. You'll need to wait until the file is available for editing.

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.

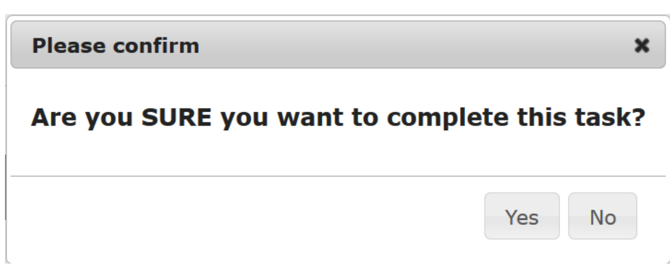
Completing tasks on the Review tab

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

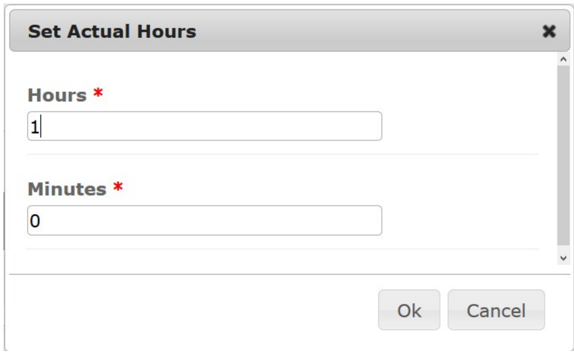
1. From the projects list, go to the project for which you just completed the task.
2. In the project, click the Reviews tab. Your tasks for review are listed:



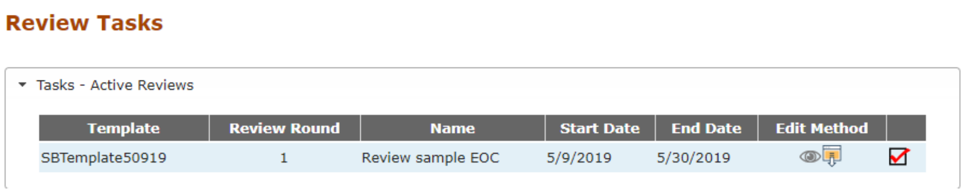
3. Select the checkbox at the end of the row for a review to mark the task as complete.
4. At the confirmation prompt, click yes to confirm you have completed the task:



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



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



Review Process for Project Managers

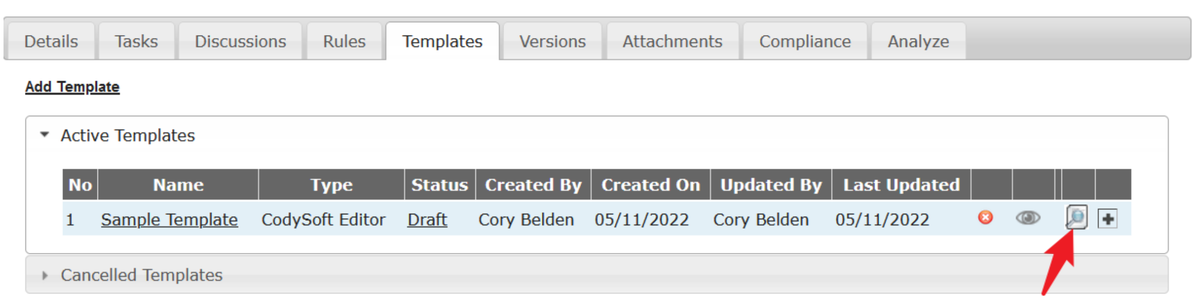
When you have created a project and set it to In Progress, uploaded a template and applied rules to elements in your template, you're ready to send draft documents for review. Reviews take place both on the Template and its draft plan documents, and on the versioned documents after the template has been approved. The top tab of the reviews process is Reviews. You can conduct rounds of review on both the Template Reviews subtab and the Version Reviews subtab. The Review Summary and Review tasks are headings on both the Template Reviews and Version Reviews tabs.

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

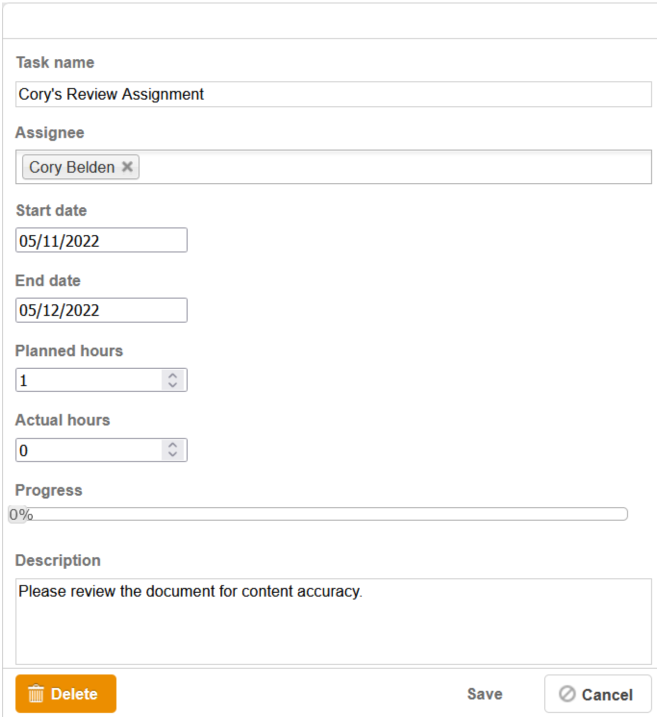
Creating Reviews

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. Enter a **Task Name**

   b. Select an **Assignee** from the list. If you select multiple assignees, individual tasks will be created for each assignee.

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

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

   e. Enter the **Planned hours** for the review

   f. Leave the **Actual hours** and **Progress** fields blank, these are for the Assignee to fill in when completing the task.

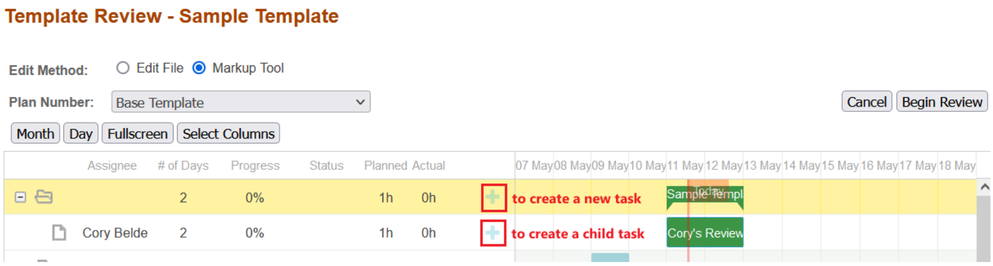
   g. Enter a **Description** of the task. This is what you are asking the Assignee to do. For example, if the task is for a specific plan or section instead of the entire template, be sure to include that information in the description.

3. Click **Save**. Note: If you click cancel on the first task before saving, it will exit out of the review space.

4. If you need to add additional task(s) with different assignments, you can use the + sign

   a. The top + sign at the review level will create a new task

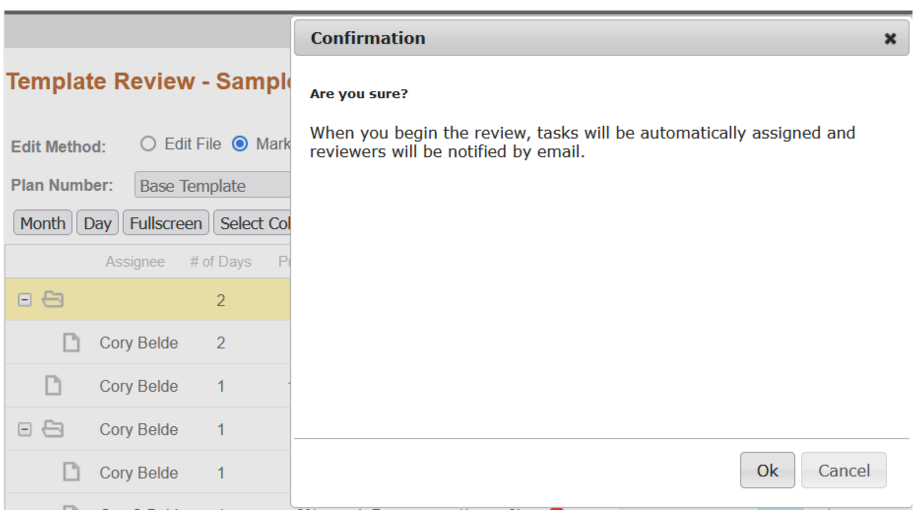
   b. The + sign at the task level will create a new child task, beneath the task row that you clicked the + sign on



5. On the Template Review screen, confirm the **Edit Method**, either Markup Tool or Edit File. The default (and most common selection) is Markup Tool, which allows reviewers to provide comments on top of the document in a collaborative space. All comments are exportable in a single PDF or csv notes format. The Edit File method opens the file in its original format, such as a Microsoft Word document for editing, and restricts users to reviewing one at a time. **NOTE**: if the document you are editing is a PDF, you can only use the Markup Tool.

6. If you would like to send a merged template out for a specific plan, select the plan for review from the **Plan Number** field (this pulls from the list of plans selected in the project). The default selection is Base template, which will send out the unmerged CodySoft editor template.
   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.

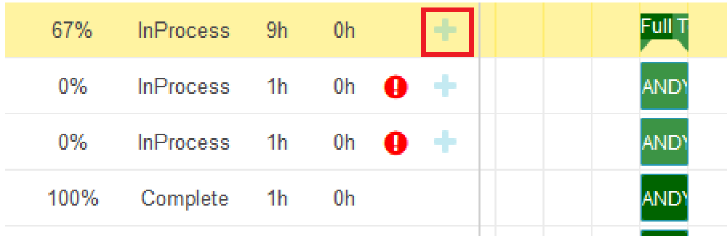
7. Click **Begin Review**. A confirmation message displays, click Ok.



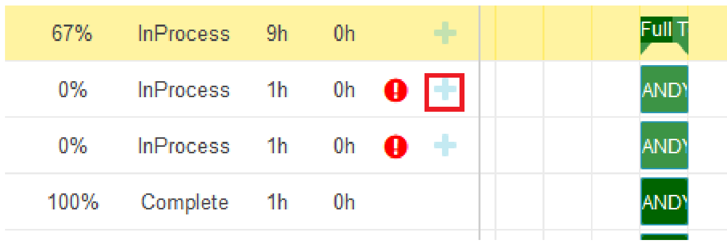
Add or Remove Reviewers while in Review

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

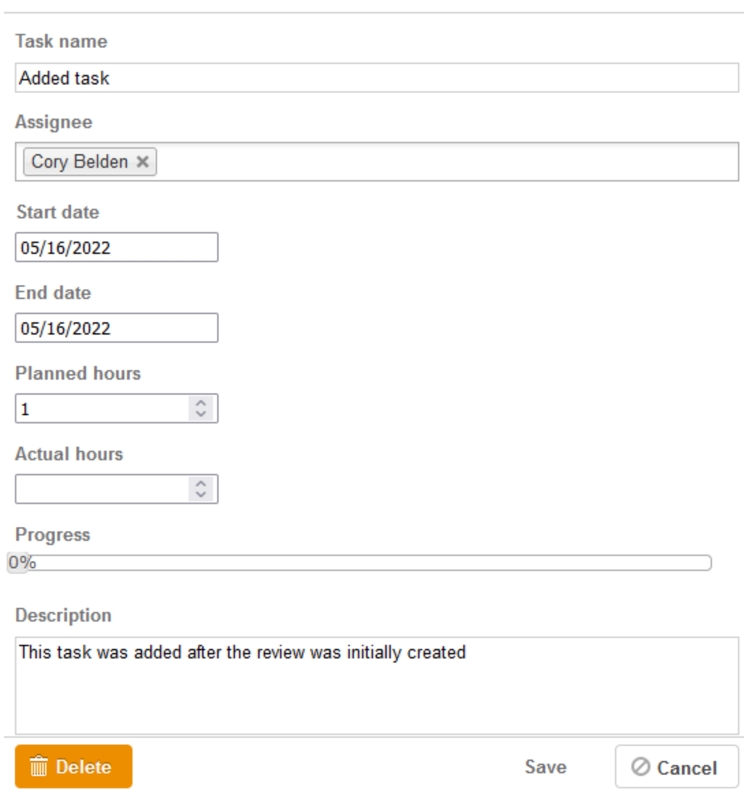
1. From the Tasks Tab, find the Review you wish to add an Assignee to.
   a. To add a new review task, click the top + sign on that review:



b. To add a new child review task underneath an existing task, click the + sign on the task row you wish to be the parent task:



2. On the Edit Task dialog, complete the Task Name, Assignee(s) (if multiple are selected a new task will be created for each of them), Start and End Dates, Planned Hours and Description of what the Assignee needs to do in the review.
3. Once you are done making changes/adding tasks, click Send Notifications and send the notification(s) on the newly created/updated tasks. Note: think of this screen like an edit mode, you can make multiple changes without sending multiple notifications. This is intentionally not an automated step so the PM is in full control of sending only the latest notification(s) of add(s) or change(s) to the assignee(s).



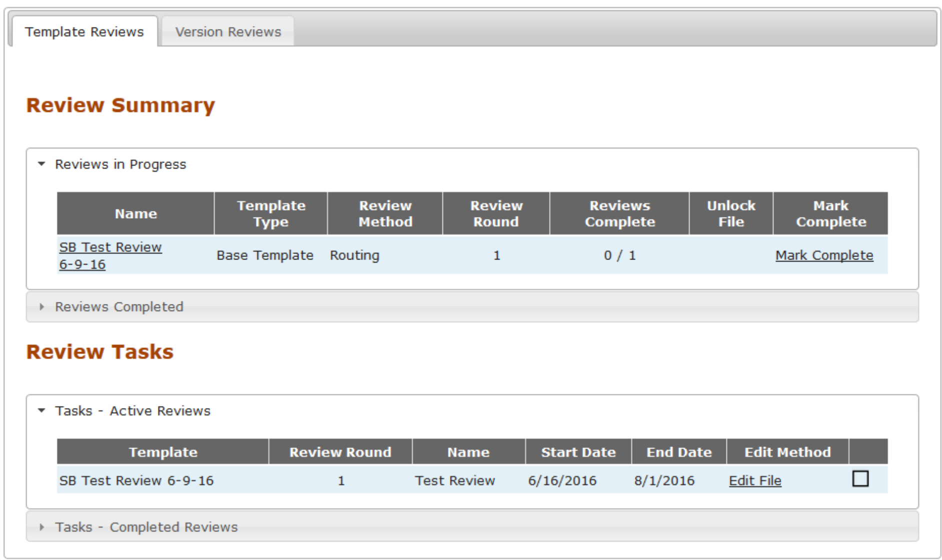
Revising Based on Review Comments

In a Template Review if you are the document developer you can edit the template as you receive review comments. See *Viewing and editing a CodySoft Editor Template*

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.

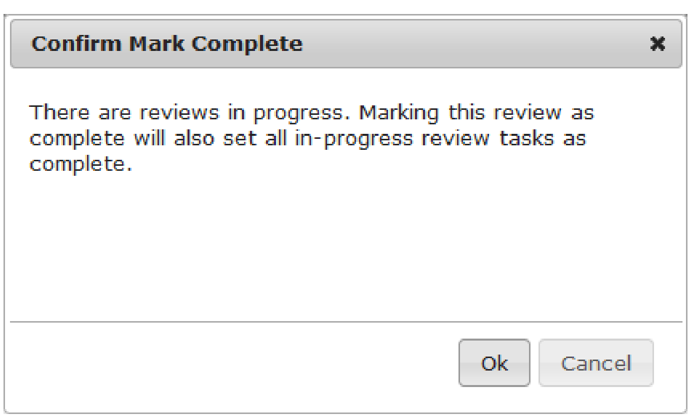


The Review Summary Section displays for the owner that initiated the review. The Review Tasks sections displays for reviewers assigned to the review.

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.

Complete One Review and Start Another Review

- Once all review tasks are complete, click **Mark Complete** on the review summary screen to close out any open tasks. You can also click **Mark Complete** when you need to replace the first round of review with another regardless of whether previous reviews were completed. For example, if four out of five people have completed their reviews, and you have made updates to the template and are ready for another round of review, you can close the current review without waiting of the fifth person, and then give everyone including that person the opportunity to review the next round of updates.

Reviewing the Review

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

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.

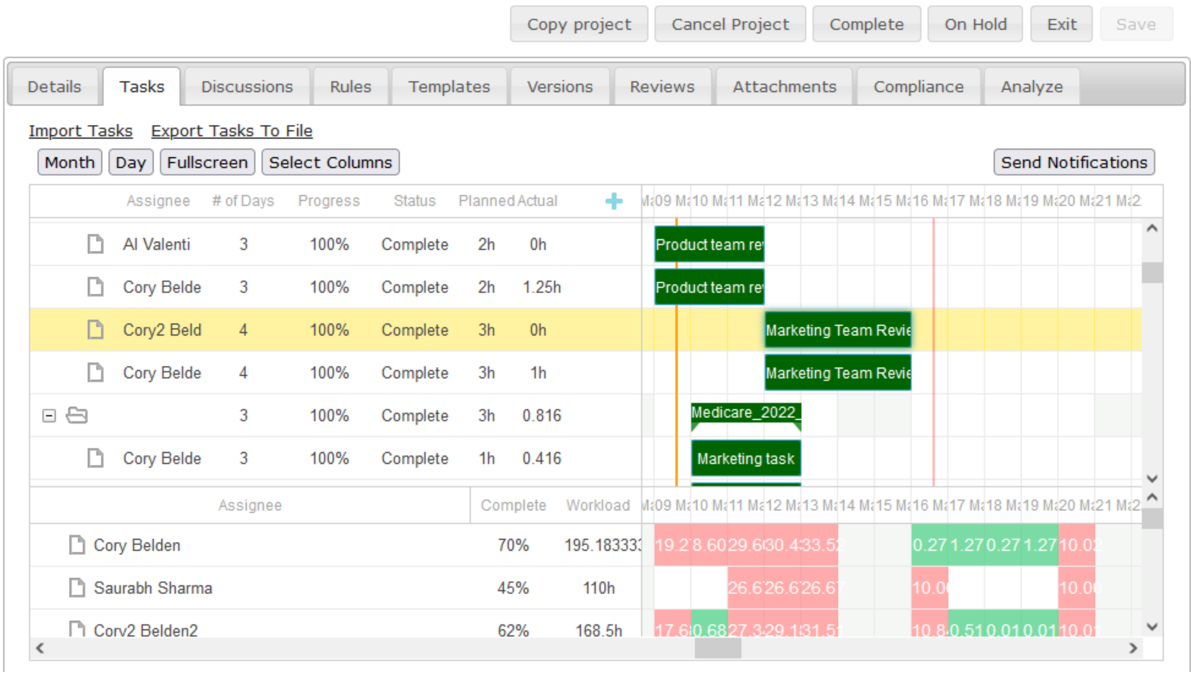
Click **Download Notes CSV** to download a .CSV file of the comments in Excel format.

Closing or canceling tasks

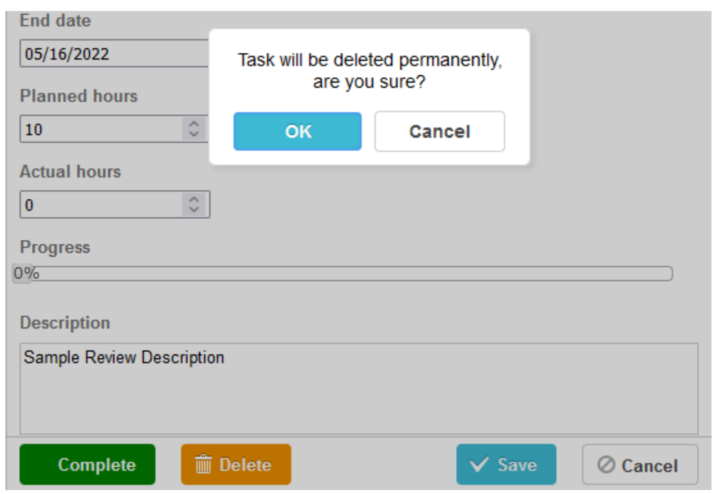
As a project manager, you may encounter circumstances where you want to close or cancel a task that has been assigned. You take these actions on the Tasks tab:

1. Select a project

2. In the project, go to the Tasks tab. All tasks for the project display:



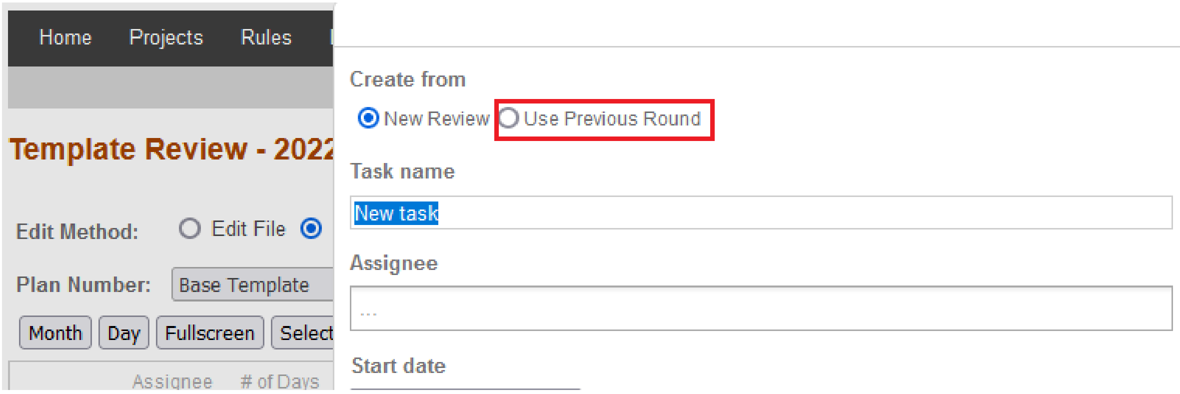
3. While you are editing the project, you can Delete tasks you no longer needed. To Delete, double click the task you would like to delete, the edit screen appears. Click Delete, a warning message appears. Click OK to Delete.



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 Templates tab.

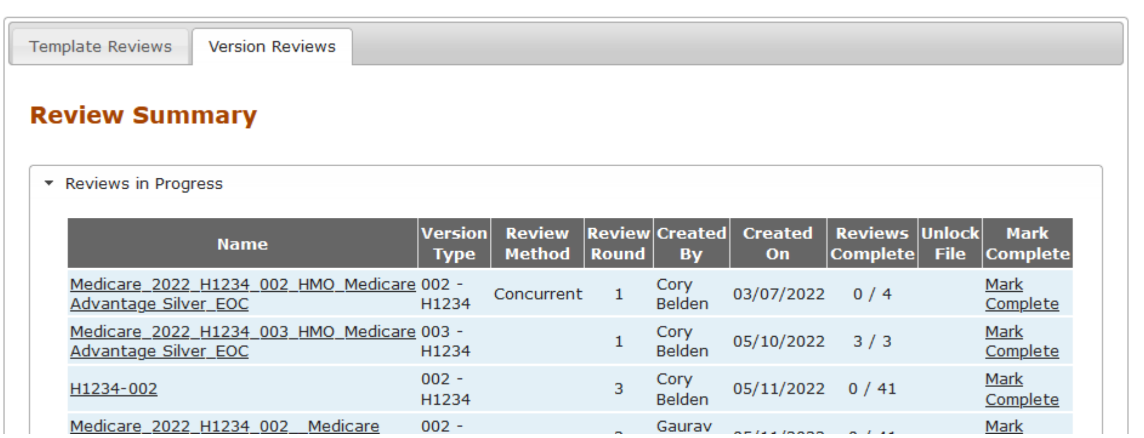
Click the Review icon to start another review. If the system detects that you have done a previous review, the 'Use Previous Round' radio button will appear but will not be selected by default.



To use the previous round's assignments, select the Use Previous Round radio button, then click Save. The tasks and assignments from the previous round of review is loaded for the next review. You can then edit that information if needed.

Creating Rounds of Review of the Versioned Documents

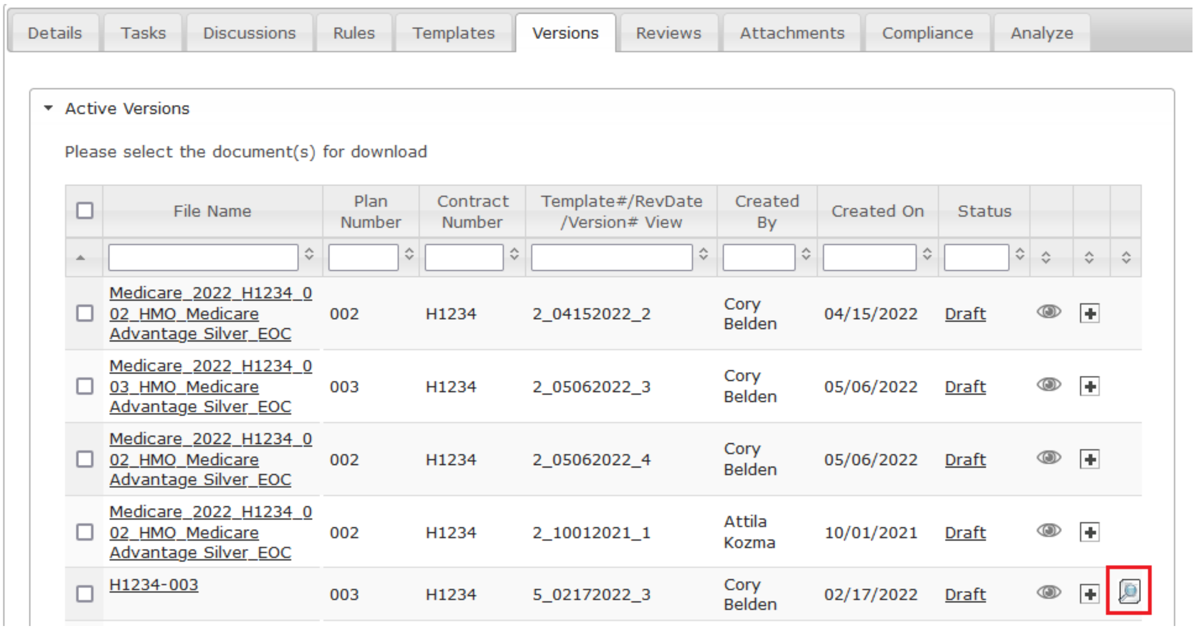
The top tab of the reviews process is Reviews. You can conduct rounds of review on both the Template Reviews subtab (this will display by default) and the Version Reviews subtab (you will need to select this to see Version Reviews):



The Review Summary and Review tasks are headings on both the Template Reviews and Version Reviews tabs.

Creating a single version review

When you are ready to have your versioned project documents reviewed, you create review tasks and assign them to the appropriate reviewers just as in the Template review process (eligible Versions will have a magnifying glass to the right of them just as the Templates did).

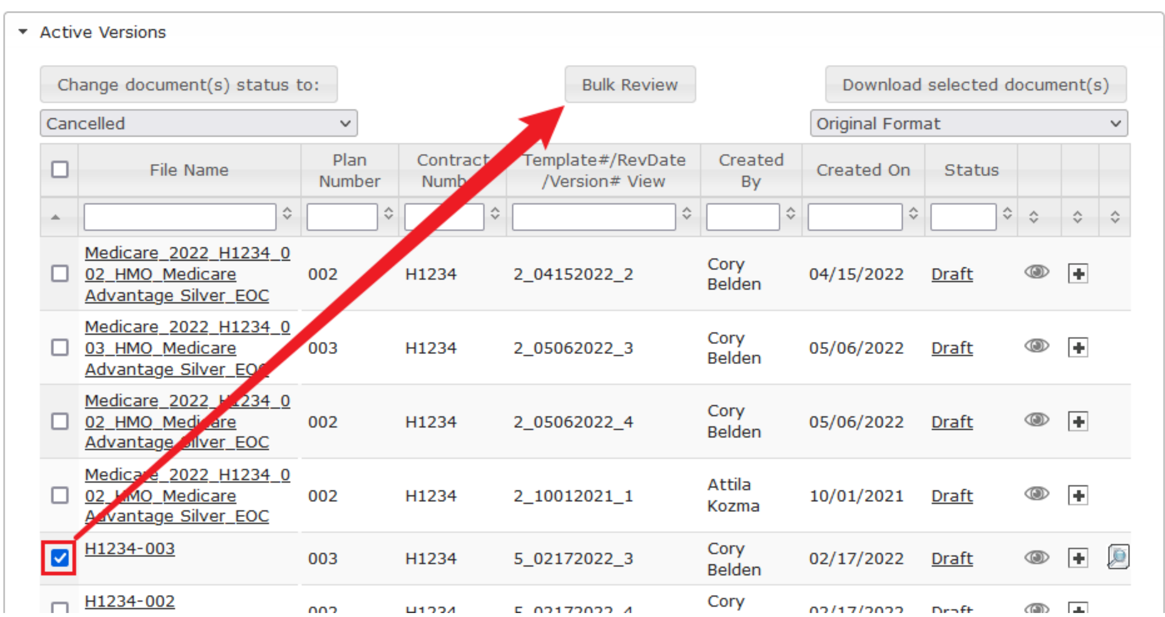


The two differences between the Template review and Version Review processes are:

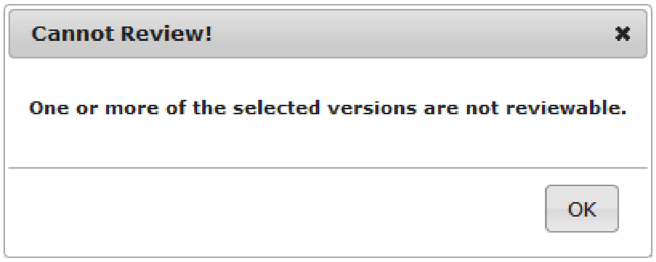
- In Version Reviews there is no option to edit the Base template, which has already been approved.
- You can send out multiple Versions for review at a time.

Creating a bulk version review

From the Versions tab select one or more Versions, a Bulk Review button shows up. Click Bulk Review.



All Versions must be in Draft status and have no in progress reviews open. If either of these conditions are not met, you will receive an error message:

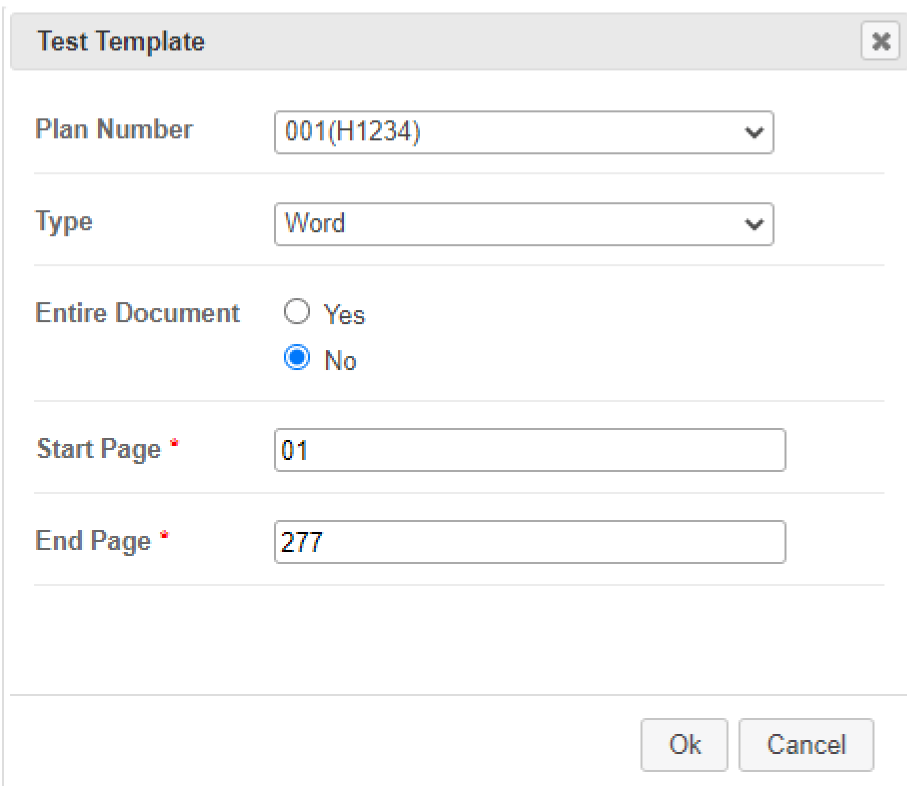


From here, the steps to create the review are the same as single template reviews, the only difference is the tasks you assign here will be sent out for each Version you select. For example, if you select 4 Versions to send out for review, and have 5 assignees, the system will create those 5 tasks, for those 4 Versions for a total of 20 tasks.

Testing, Approving, Declining, and Cancelling the CodySoft® Template

To test a CodySoft Editor template to validate rule selection and execution:

1. Click the **Test the Template** icon from the template editor screen.

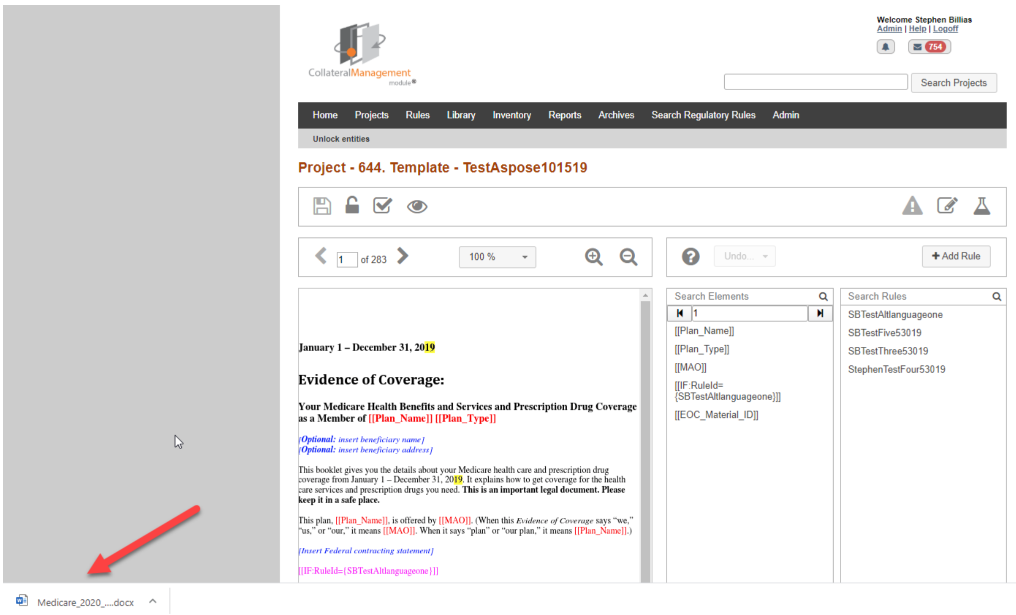


2. From the popup window, choose the plan number for the plan you wish to test.

   NOTE: When the project is set up in CodySoft®, your project manager selects the plans to which the project applies.

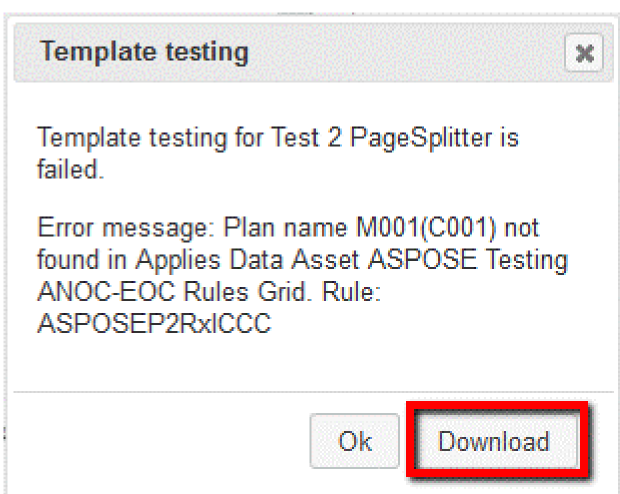
3. Select the type of output you would like, either a Word file or a PDF.
4. Select Yes to test the entire document. If you select Yes, the page range fields are hidden.

5. Select No to specify a page range to test
    a. Enter a Start page
    b. Enter an End page
6. Click **OK.** The Template Testing dialog box opens.
7. Click **Preview.** A plan-specific version is displayed as a PDF or MS Word document in the lower-left corner of the template editor screen. You can open or download this test the template file.



NOTE: If you have Track Changes turned on in your Word template, the system treats them as Accepted in the preview file.

NOTE: If errors occur when you test a template, an error message displays, as in this example:



You can download the error(s) in an Excel .csv file and then edit the template or asset to address the error(s).

NOTE: CodySoft removes blank rows and end of row paragraph marks in all tables in your document as part of the Test the Template process.

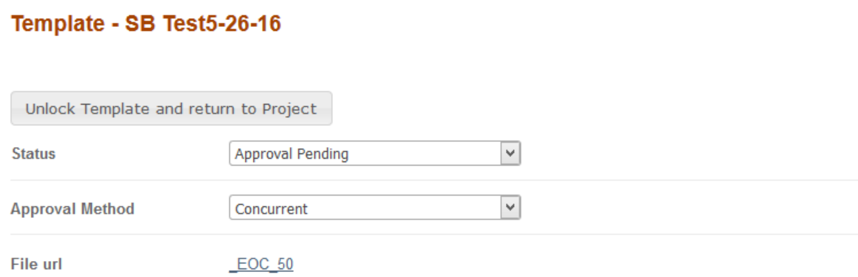
CodySoft updates all Tables of Contents in your document with any page number changes and any new, changed, or deleted headers also.

Approving a template

Once all review tasks have been completed and the template updated, then you want to mark the template as Approved to move to the Version stage.

When document versions have been reviewed and edited based on review comments, you are ready to obtain final approvals on the documents.

1. On the Templates tab, click the filename. The Edit Templates screen displays:

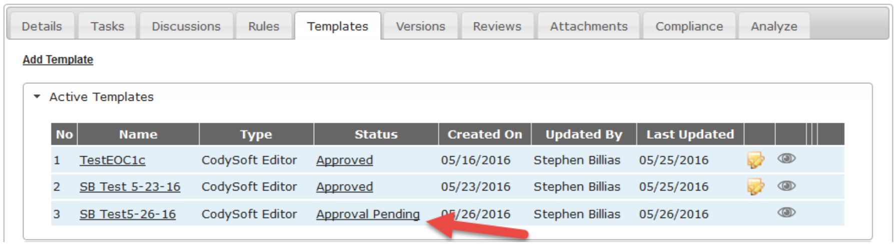


2. Change the **Status** to **Approval Pending**

3. Identify the **Approval Method**, either Concurrent or Routing

4. Select approvers from the list:

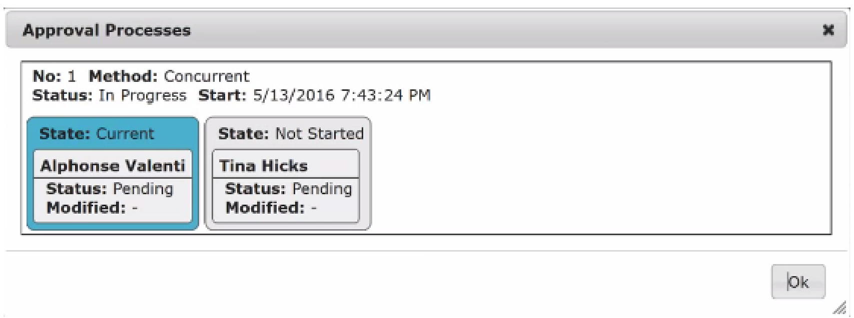
5. Click **OK**. The document now displays as Approval Pending on the Templates tab:



NOTE: You cannot edit a document in Approval Pending status. If you try to Edit Version, you receive a message:

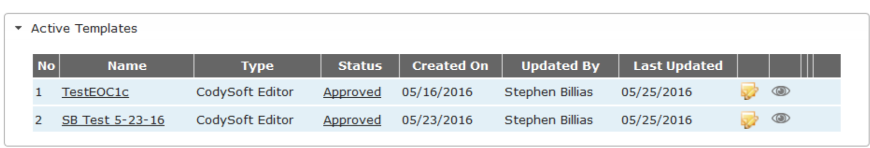
"Version can't be edited while in Pending approval status".

6. Click the link in the Status column of a template to see the Approval Process status dialog:



When all reviewers have approved the template:

1. From the templates tab, click the template name
2. Change the Status to **Approved**
3. Change the **Approval Method** to the method used, either Routing or Concurrent
4. Click **Commit Changes**
5. The Create Versions icon for creating Versions appears on the template row



Declining a Template

If you are an approver and you want to reject a template:

1. From the Templates tab, click the **template name**.
2. Click **Decline**.
3. Add a **comment** why you are declining the version
4. Click **OK**

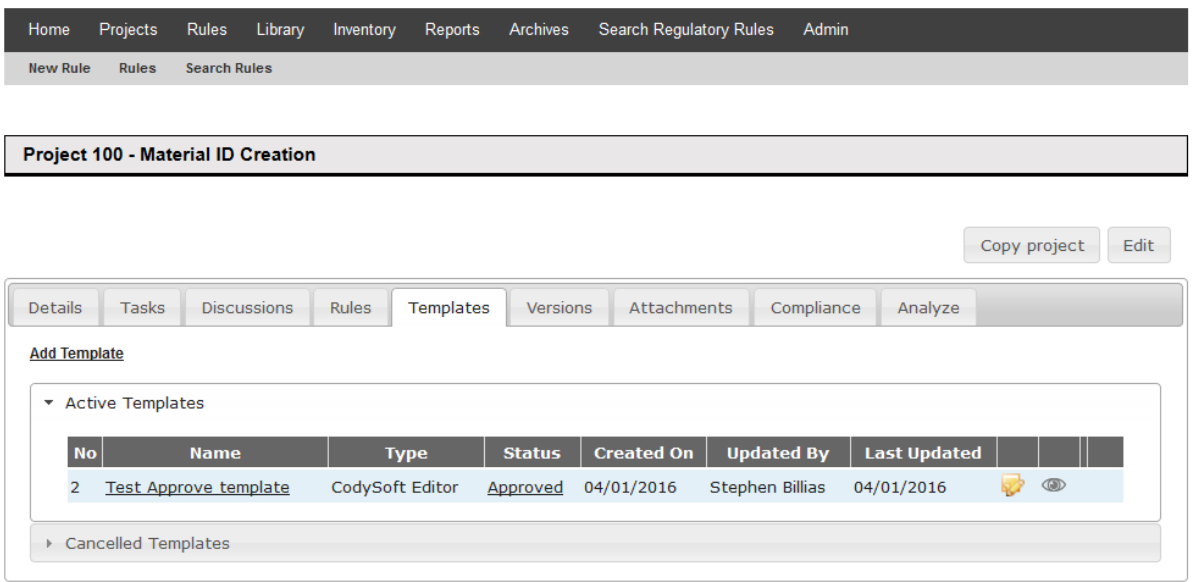
The template is returned to Draft status. Click the Status column on the Templates tab to see Approval Processes dialog box that provides information on the approval process.

Cancelling a Template

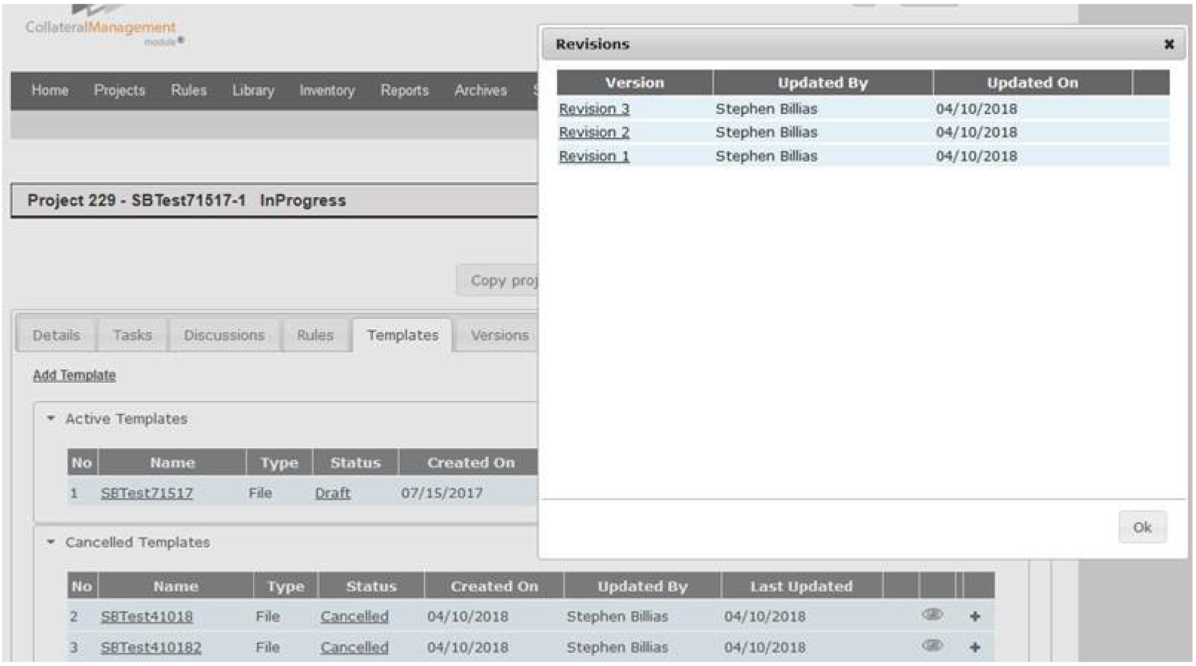
To cancel a template that is in draft status:

1. In the project record, click the **Templates** tab.
2. Click the name of the template you would like to approve.
3. For **"File" or "Excel"** templates, Click **Edit**
4. From the **Status** drop-down list, select **Cancelled**.
5. Click **Commit Changes**.
6. Click the **Project** link to return to the project record.

NOTE: Active and Cancelled templates are displayed in separate area of the Templates tab. Cancelled templates are hidden unless you click the down arrow next to the Cancelled Templates label.



You can view a history of revisions on Cancelled templates just as you can with Active templates:



1. Click the plus sign (+) on the row for the cancelled template.
2. Click the revision number of the revision you want to open.

NOTE: You can save the earlier cancelled revision locally after you open it in MS Word.

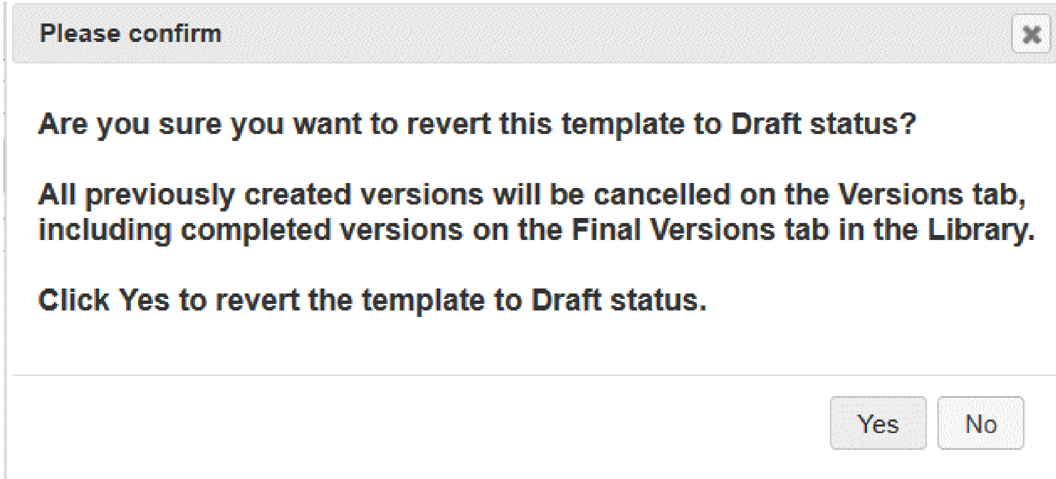
Reverting a Template to Draft Status

If you need to make additional changes to an Approved template to create updated versions, you can revert the template to Draft status.

To revert an approved template back to draft status:

1. In the project record, click the **Templates** tab.
2. Click the name of the Approved template you would like to revert to Draft status.
3. On the Template Editor screen, click the template status indicator:

4. Select **Draft**. A confirmation message displays:



5. Click **Yes**. All previously created versions are cancelled and moved to the Cancelled versions area on the Versions tab. Any Completed versions are also removed from the Final Versions tab in the Library. You can make additional edits to the template and reapprove it to make new versions.

Working with Versions

Version Naming Convention

CodySoft® uses fields from the completed Project Record to generate file names for versions created from approved templates.

Although the version naming convention is partly based on CMS requirements, it can be used for other plan (and non-plan) types (for example, Medicaid, commercial, member services department).

The version name includes the following parts:

- MCE or Contract # (or another identifier; for example, department name, Medicaid, etc.)
- Plan # (or another identifier; for example, NA)
- Media type
- CodySoft project #

Medicare projects only:

- CMS disposition type
- CMS approval date (once approved)

The following information is available on the Versions tab, for version control purposes:

- Template #
- Rev date (MM_YY)

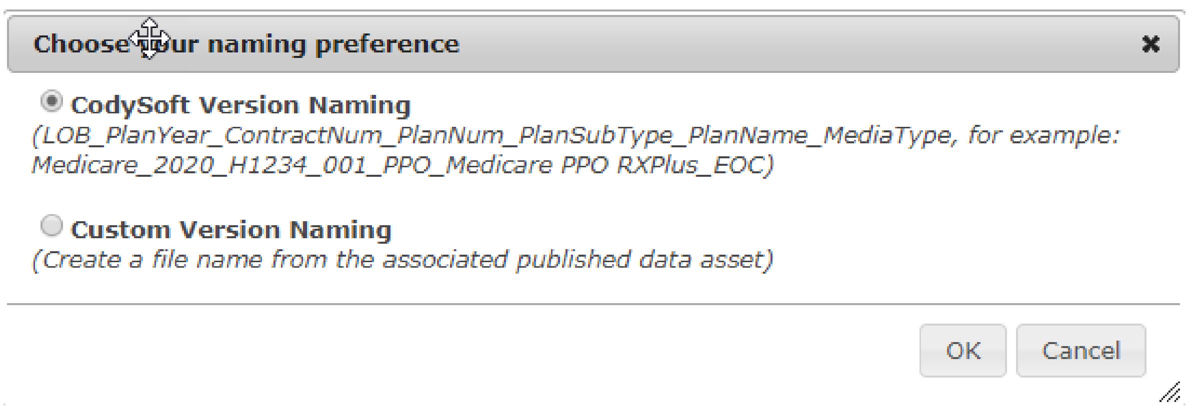
- Version #

NOTE: Cody also provides a method for custom naming versions. See the information in the section on creating versions for the different template types.

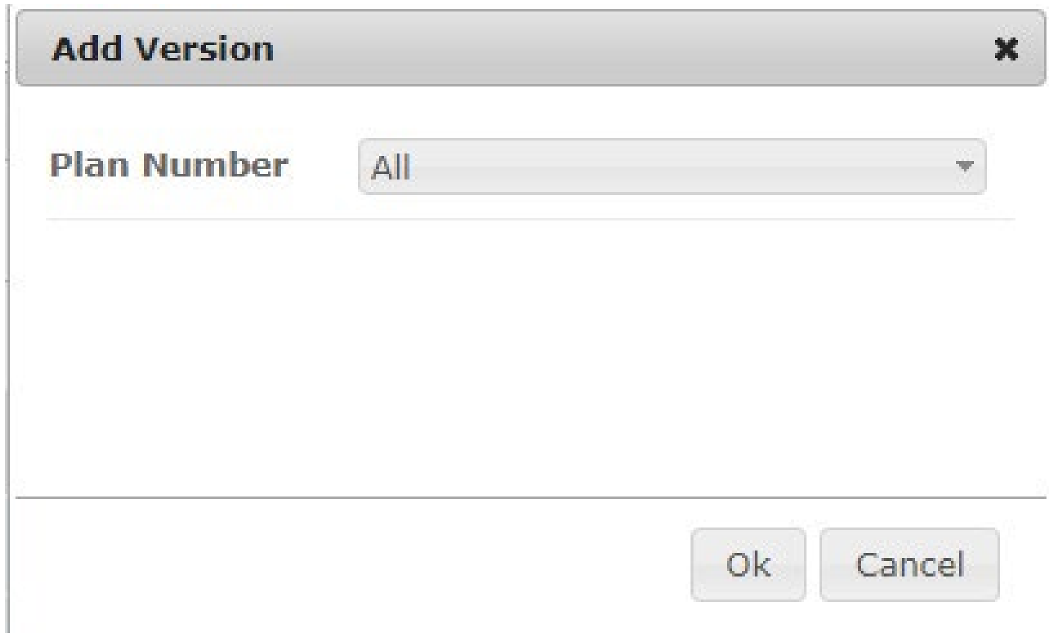
Creating a version from a File Template (MCE Projects)

Versions are created from approved Word and File templates only. See *Approving a template.* **Excel Templates cannot be versioned. If you have an Excel template that needs to be versioned after it has been finalized, upload the final template version as a "file" template.**

1. In the project record, click the **Templates** tab.
2. Click the **Create Version** icon of the template for which you would like to create a version. A **Control Version** is created. This creates a placeholder for your CMS Submission version of the document you have created. This placeholder is used for CMS submission and approval. Once the Control Version is created, you can create placeholders for your market versions.
3. Click the **Create Version** icon. The Choose your naming reference dialogue displays:



a. Select CodySoft Version Naming to use Cody's standard naming convention. The **Add Version** dialogue displays:

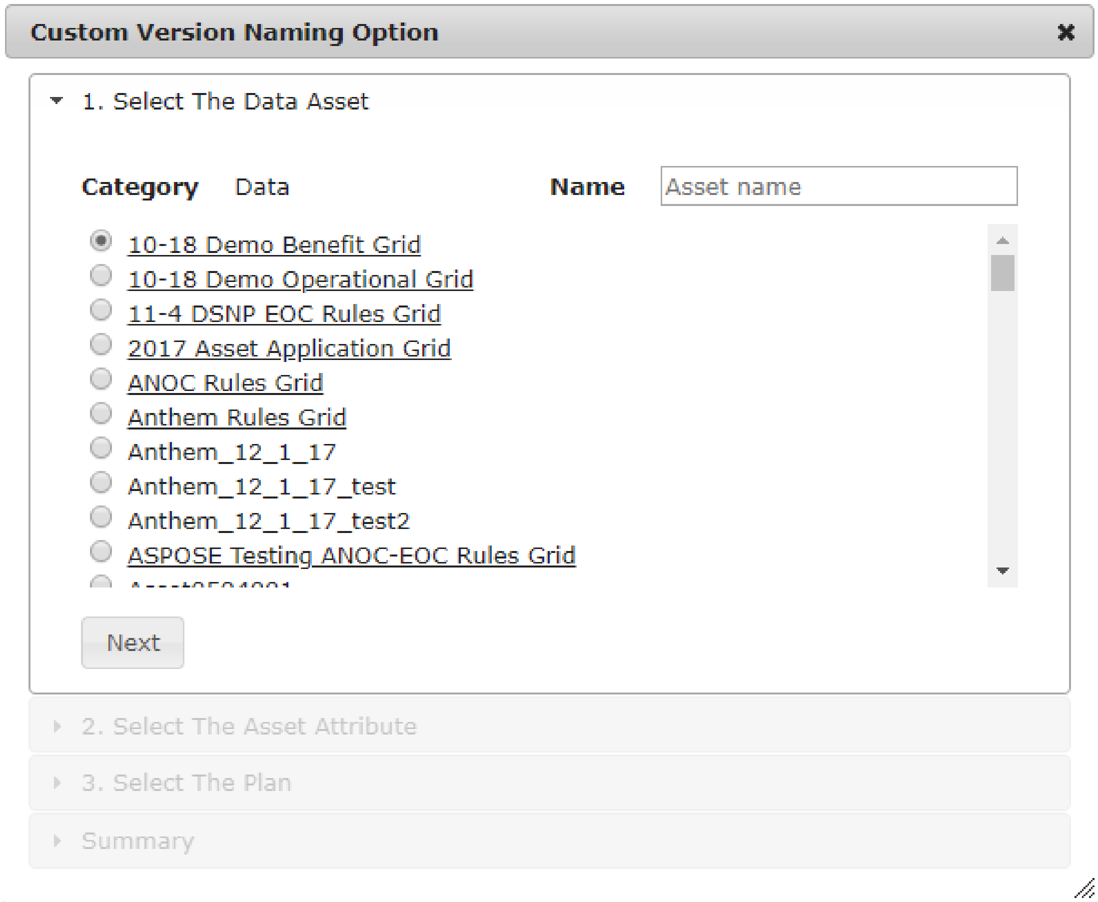


i. In the **Add Version** box, **Plan Number** – If a plan number is associated with this version, select the appropriate number from the drop-down list.

ii. ii. If a version is to be created for all plan numbers, select **All** from the drop-down list.

iii. Click **OK**.

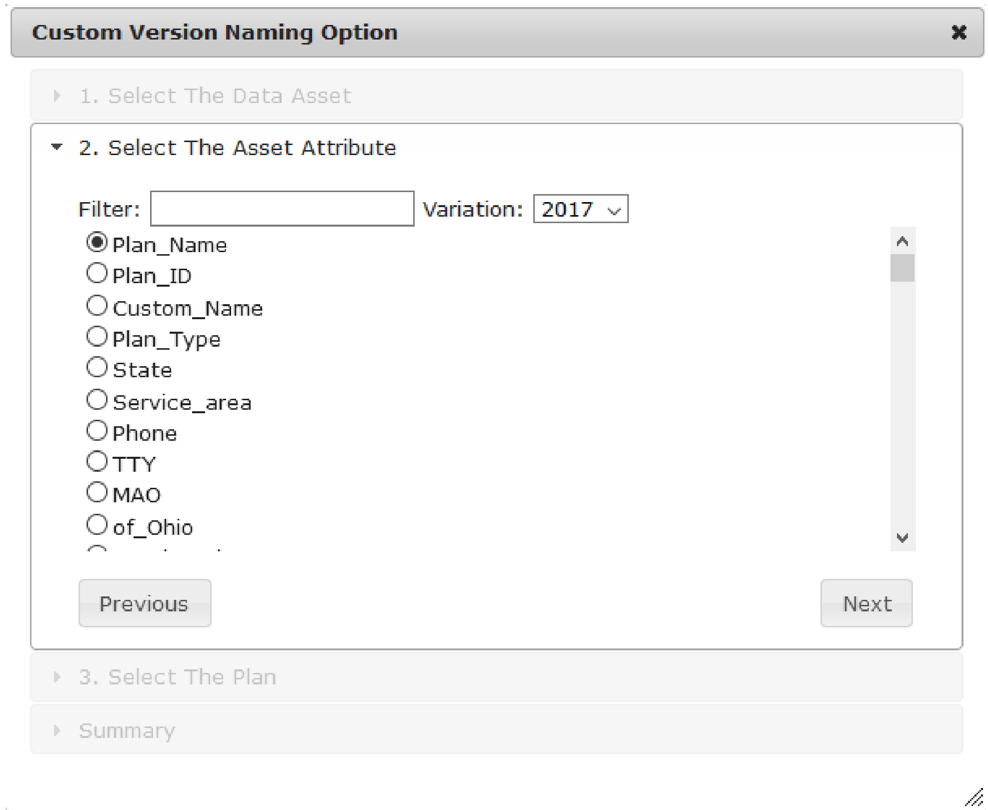
b. Select Custom Version Naming to create a unique name based on the associated data asset. The Custom Version Naming Option dialogue displays:



i. Select the data asset associated with this plan or plans.

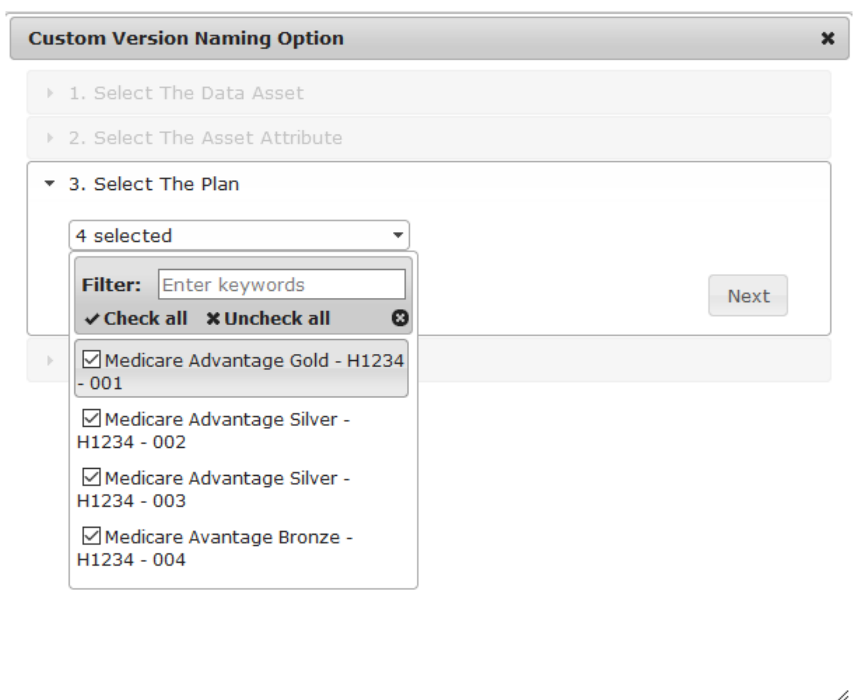
ii. Click **Next**

iii. Select the Asset Attribute and Variant to use as part of the custom name.



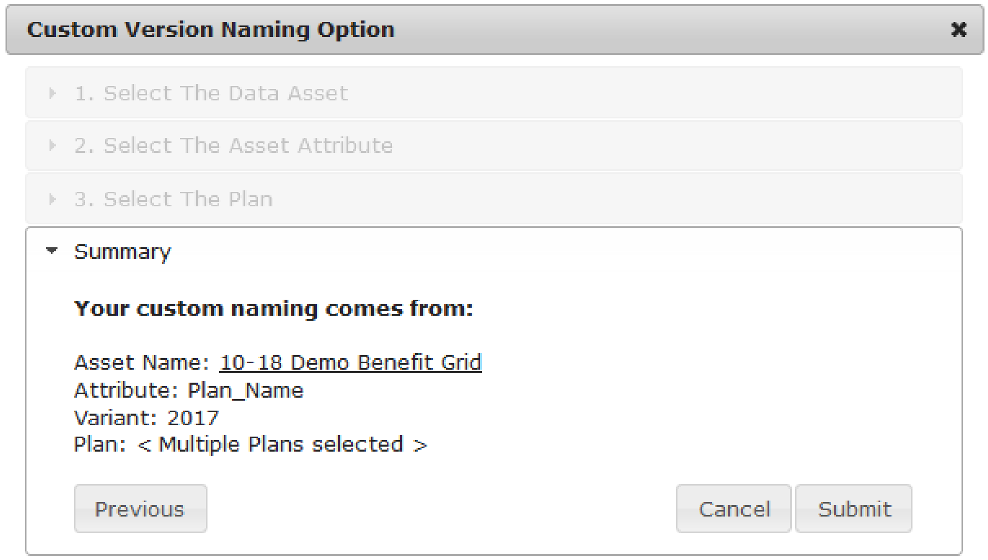
iv. Click Next to continue or **Previous** if you need to go back to the Data Asset choice

v. Select the plan from the dropdown list:



vi. Click **Next** to continue or **Previous** if you need to go back to the Asset Attribute and Variant choice

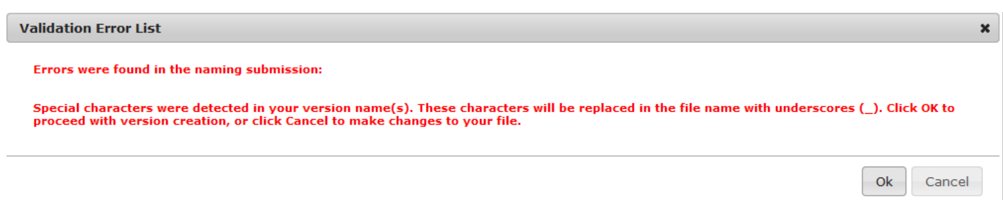
vii. Review your selections:



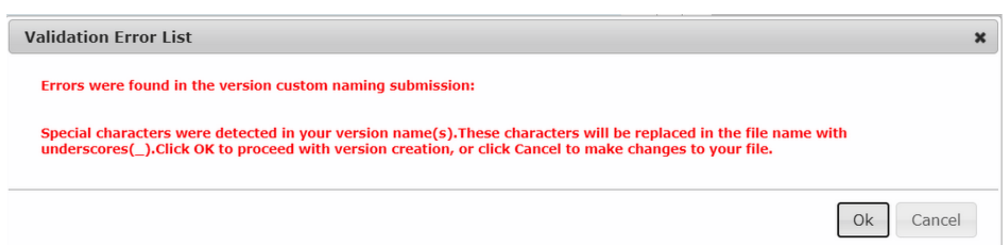
viii. Click **Submit** to confirm your selections and begin the Versioning process, or click **Cancel** to start over or **Previous** to return to the Select Plan choice.

NOTE: CodySoft checks to see if your standard or custom version name contains special characters that are not allowed because they cause errors when exporting the files, and displays an error message when they are encountered when you click Submit:

For standard file naming:



For custom file naming:



If your standard or custom version name contains any special characters, you have two options:

a. Click **OK** to proceed with version creation. The special characters will be replaced with underscores in your file name(s).

b. Click **Cancel** to make changes to your file before creating versions.

4. Click the **Versions** tab to access the newly created version(s) placeholder(s).

5. Download versions as needed. See *Downloading Versions.*

   NOTE: CodySoft removes blank rows and end of row paragraph marks in all tables in your documents as part of the Versioning process.

   CodySoft updates all Tables of Contents in your document with any page number changes and any new, changed, or deleted headers also.

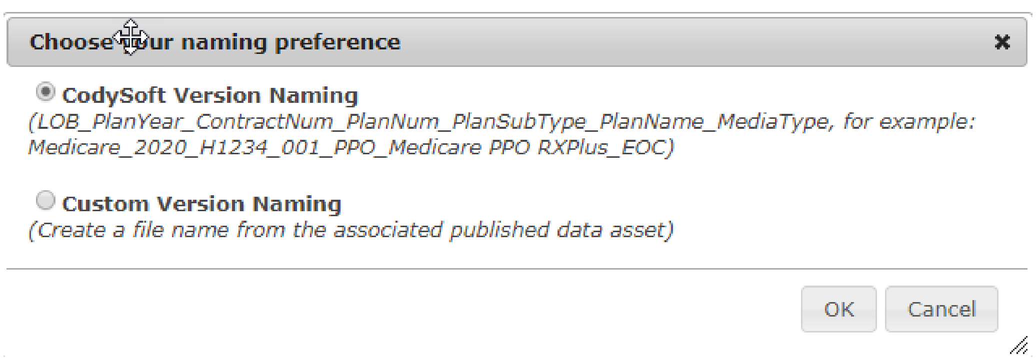
   You receive a notification when versions are created. If any versions fail, you receive a notification identifying plan numbers and the reasons the versions failed.

Creating a version from a File Template (Non-MCE Projects)

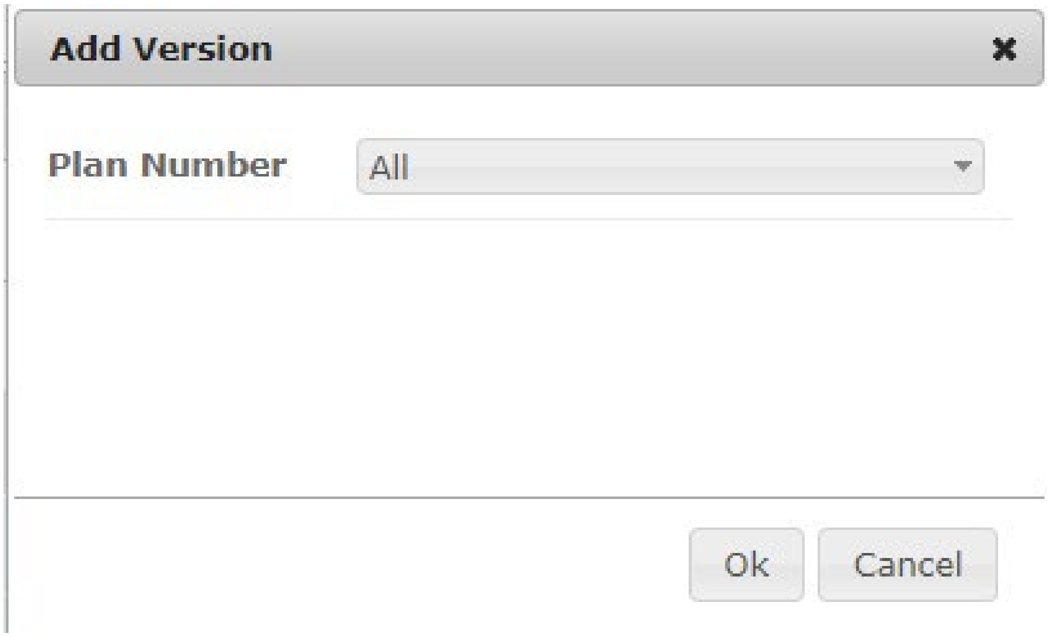
Versions are created from approved Word and File templates only. See *Approving a template.* **Excel Templates cannot be versioned. If you have an Excel template that needs to be versioned after it has been finalized, upload the final template version as a "file" template.**

1. In the project record, click the **Templates** tab.

2. Click the **Create Version** icon . The Choose your naming reference dialogue displays:

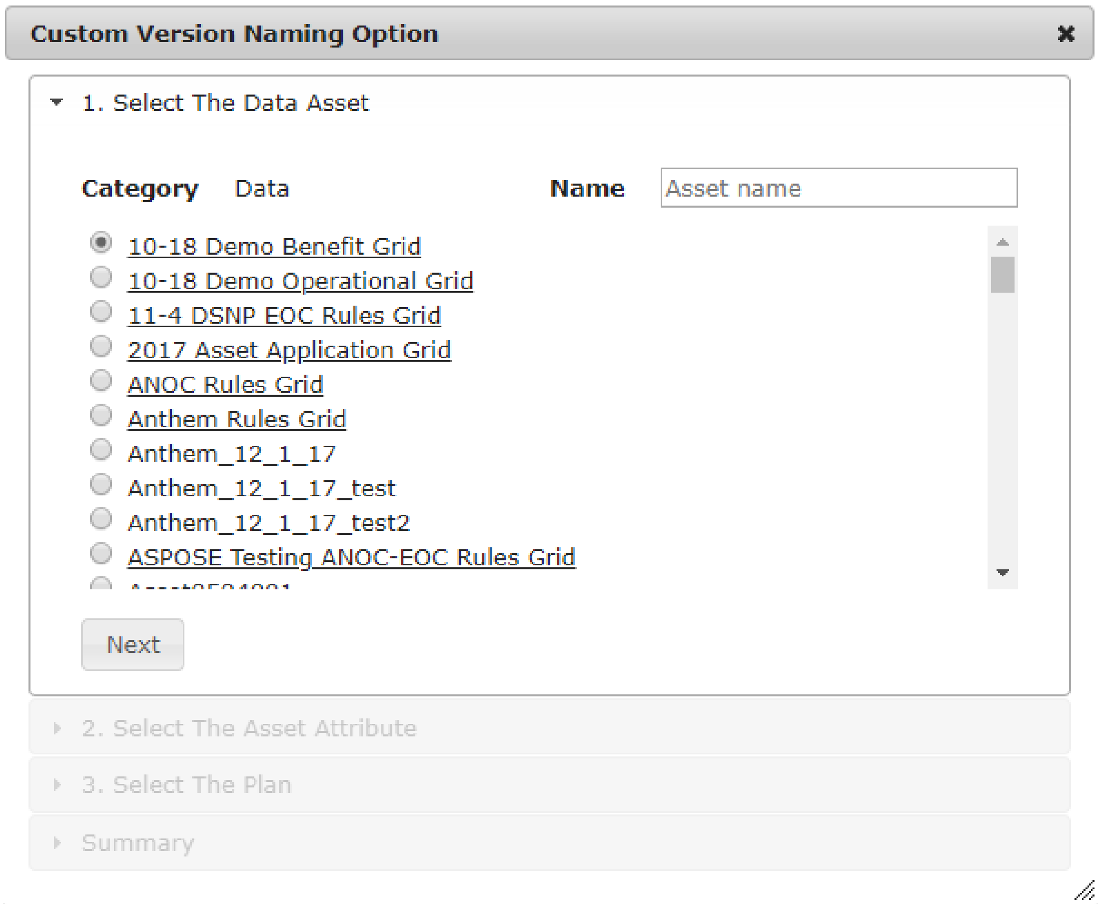


a. Select CodySoft Version Naming to use Cody's standard naming convention. The **Add Version** dialogue displays:



i. In the **Add Version** box, **Plan Number** – If a plan number is associated with this version, select the appropriate number from the drop-down list.
ii. ii. If a version is to be created for all plan numbers, select **All** from the drop-down list.
iii. Click **OK**.

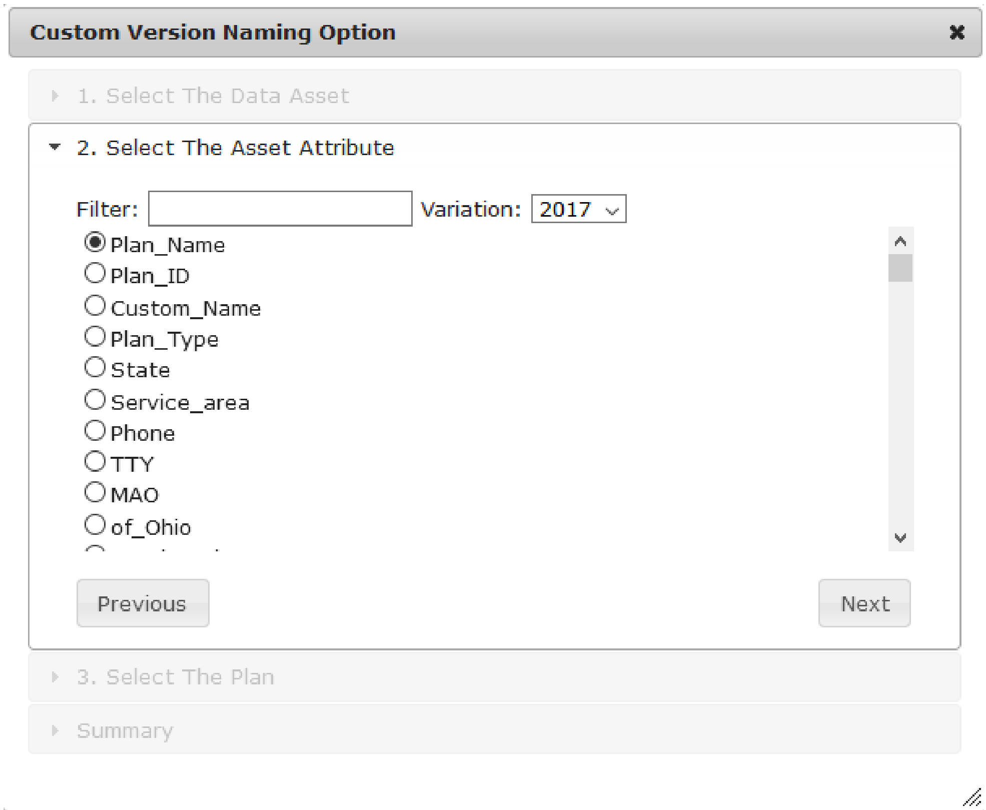
b. Select Custom Version Naming to create a unique name based on the associated data asset. The Custom Version Naming Option dialogue displays:



i. Select the data asset associated with this plan or plans

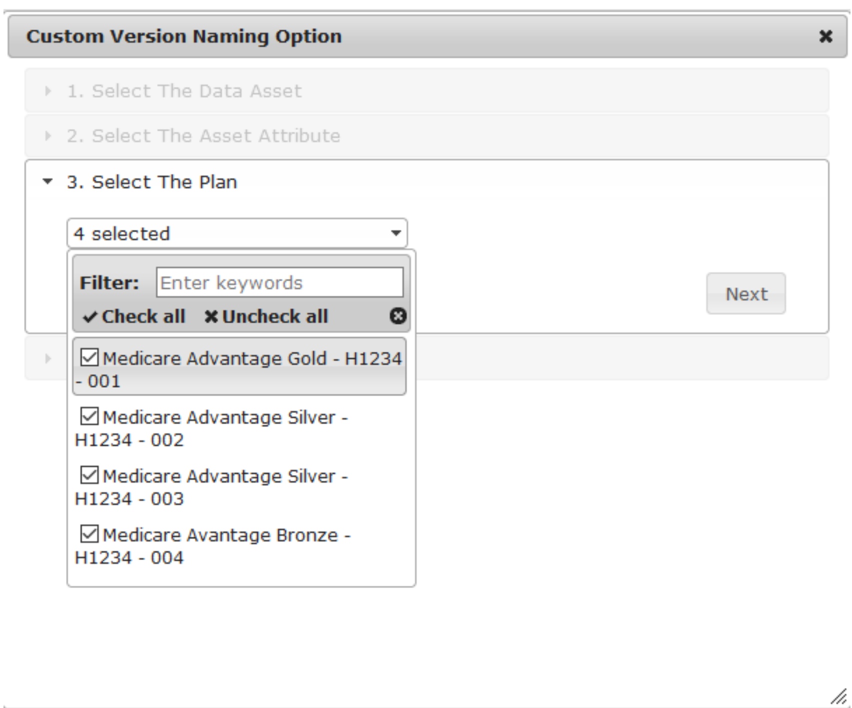
ii. Click **Next**

iii. Select the Asset Attribute and Variant to use as part of the custom name.



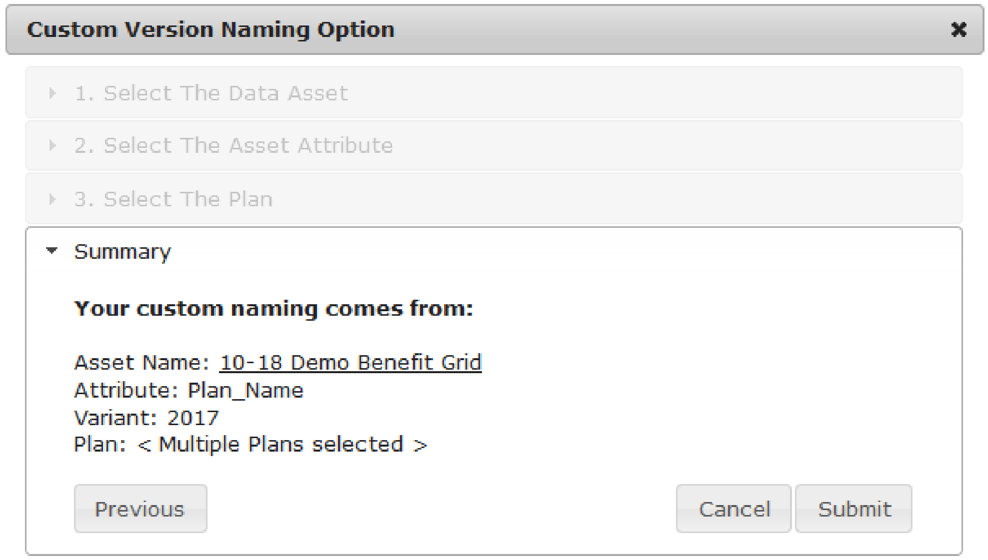
iv. Click **Next** to continue or **Previous** if you need to go back to the Data Asset choice

v. Select the plan from the dropdown list:



vi. Click **Next** to continue or **Previous** if you need to go back to the Asset Attribute and Variant choice

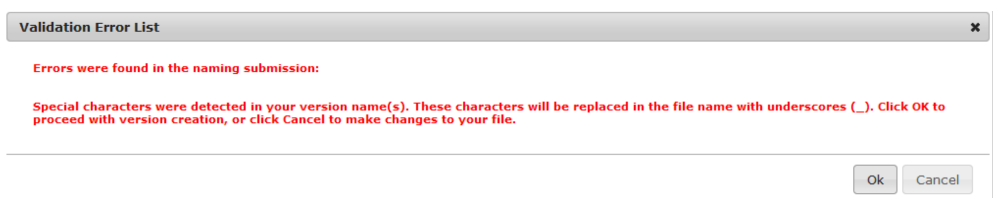
vii. Review your selections:



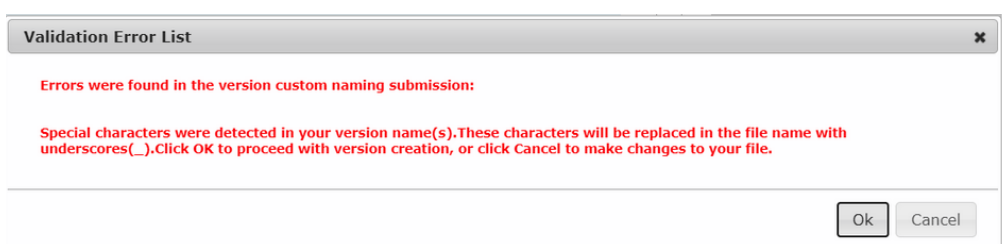
viii. Click **Submit** to confirm your selections and begin the Versioning process, or click **Cancel** to start over or **Previous** to return to the Select Plan choice.

NOTE: CodySoft checks to see if your standard or custom version name contains special characters that are not allowed because they cause errors when exporting the files, and displays an error message when they are encountered when you click Submit:

For standard file naming:



For custom file naming:



If your standard or custom version name contains any special characters, you have two options:

a. Click **OK** to proceed with version creation. The special characters will be replaced with underscores in your file name(s).

b. Click **Cancel** to make changes to your file before creating versions.

3. Click the **Versions tab** to access the newly created version(s) placeholder(s).

4. Download versions as needed. See *Downloading Versions*

   NOTE: CodySoft removes blank rows and end of row paragraph marks in all tables in your documents as part of the Versioning process.

   CodySoft updates all Tables of Contents in your document with any page number changes and any new, changed, or deleted headers also.

Creating a version from a CodySoft® Editor Template (MCE Projects)

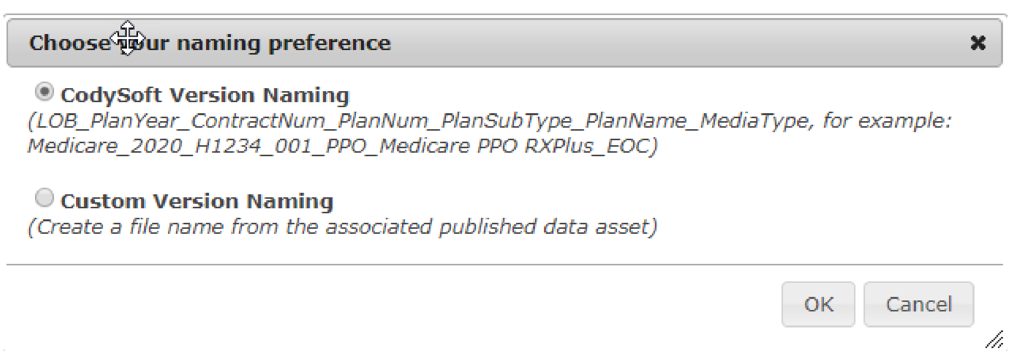
Versions are created from approved Word and File templates only. See *Approving a template.* **Excel Templates cannot be versioned. If you have an Excel template that needs to be versioned after it has been finalized, upload the final template version as a “file” template.**

1. In the project record, click the **Templates** tab.

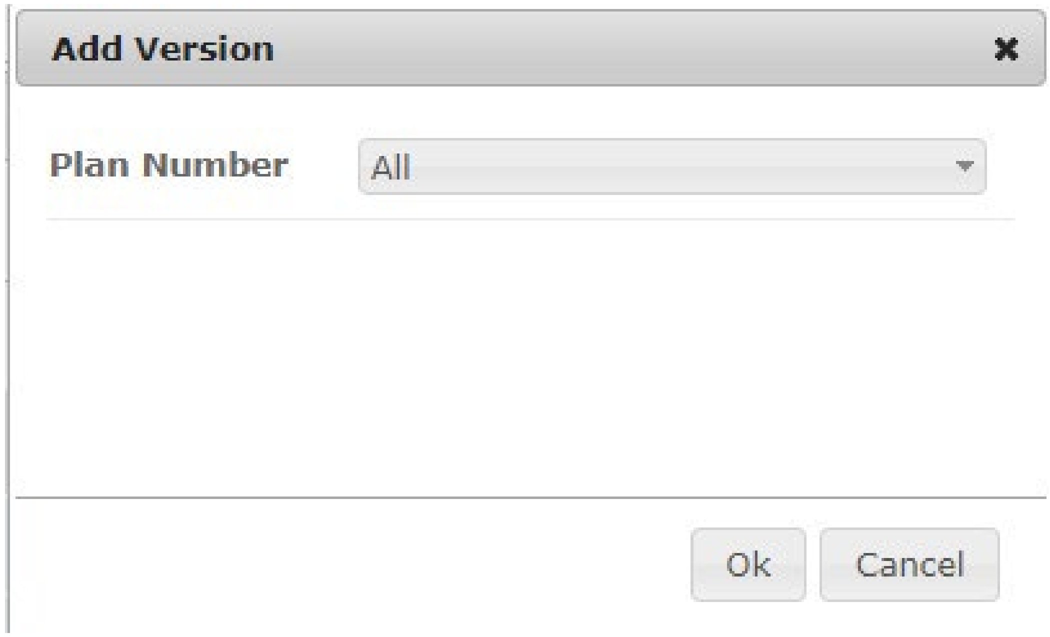
2. Click the **Create Version** icon of the template for which you would like to create a version.

3. A **Control Version** is created. This creates a placeholder for your CMS Submission version of the document you have created. This placeholder is used for CMS submission and approval. Once the Control Version is created, you can create placeholders for your market versions.

4. Click the **Create Version** icon . The Choose your naming reference dialogue displays:

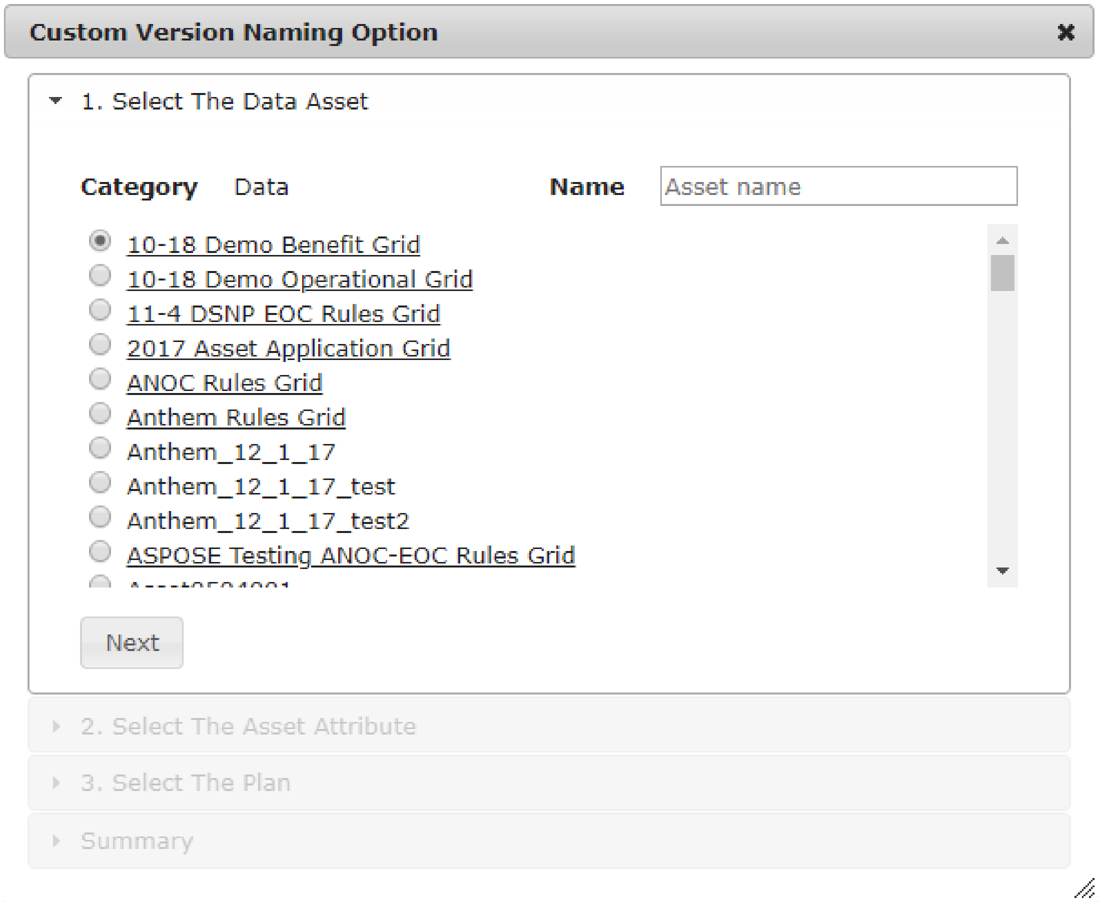


a. Select CodySoft Version Naming to use Cody's standard naming convention. The **Add Version** dialogue displays:



i. In the **Add Version** box, **Plan Number** – If a plan number is associated with this version, select the appropriate number from the drop-down list.
ii. ii. If a version is to be created for all plan numbers, select **All** from the drop-down list.
iii. Click **OK**.

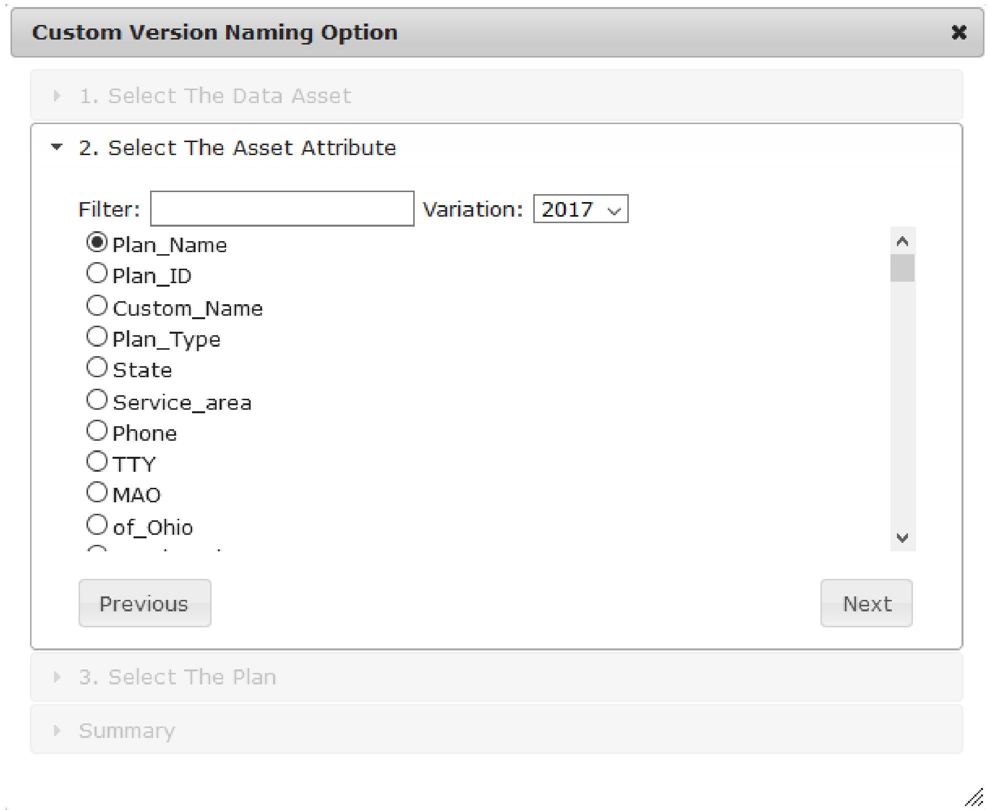
b. Select Custom Version Naming to create a unique name based on the associated data asset. The Custom version Naming Option dialogue displays:



i. Select the data asset associated with this plan or plans.

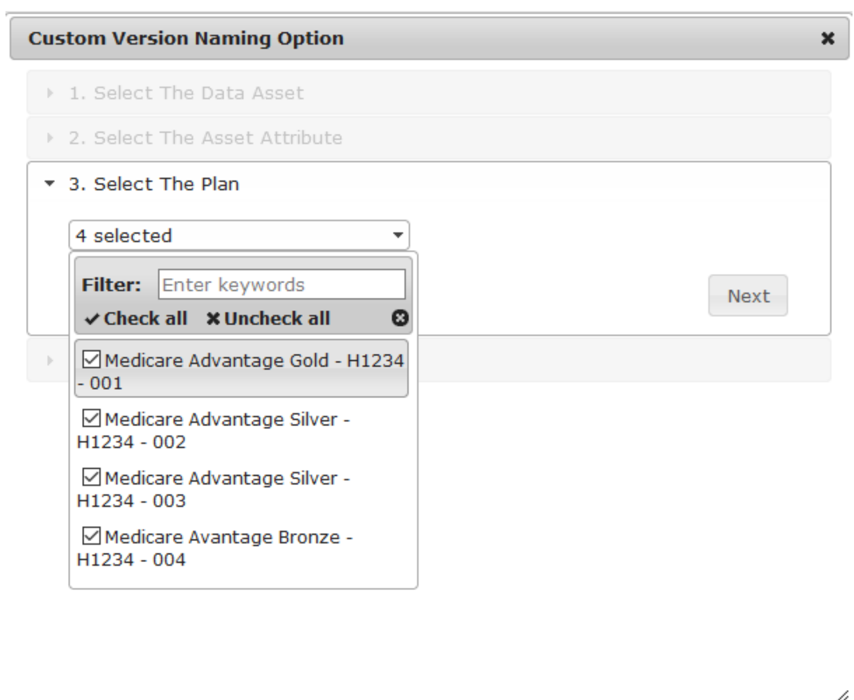
ii. Click **Next**.

iii. Select the Asset Attribute and Variant to use as part of the custom name.



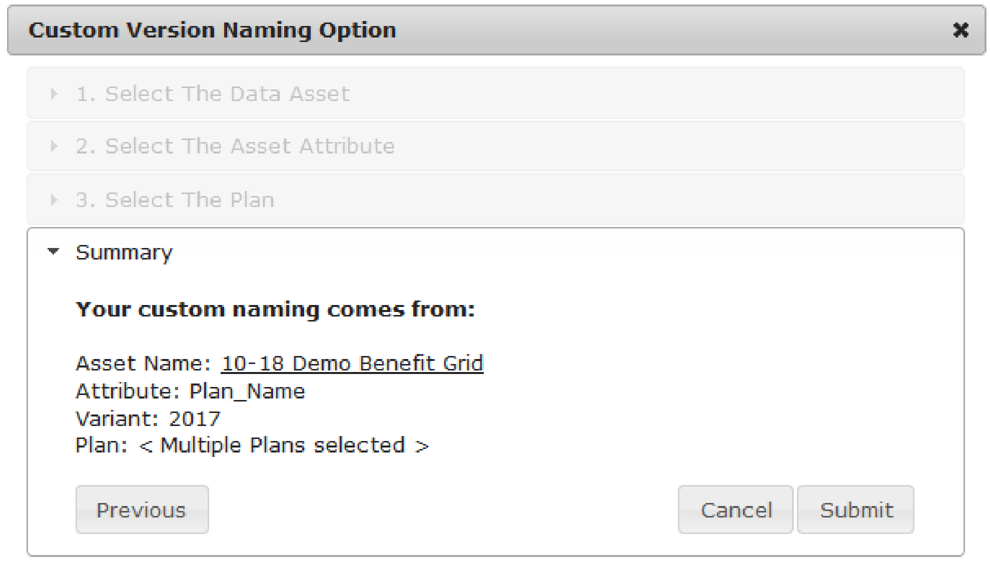
iv. Click **Next** to continue or **Previous** if you need to go back to the Data Asset choice

v. Select the plan from the dropdown list:



vi. Click **Next** to continue or **Previous** if you need to go back to the Asset Attribute and Variant choice

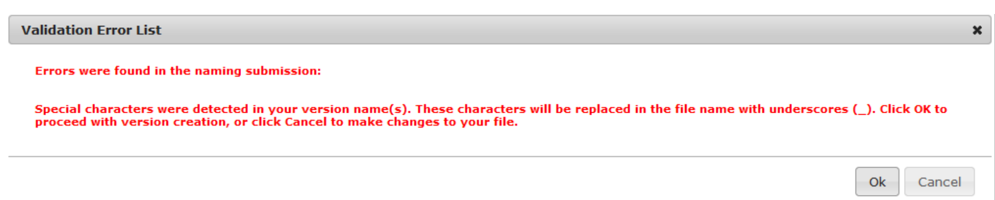
vii. Review your selections:



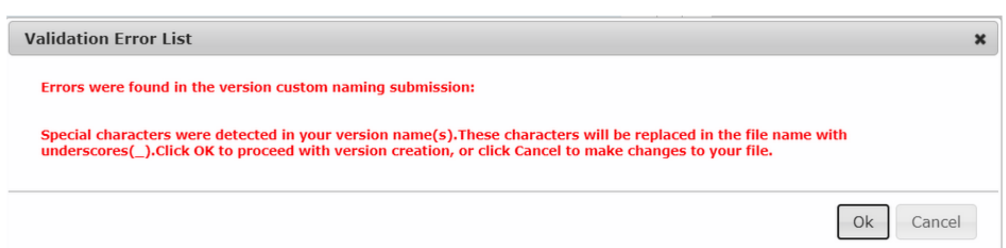
viii. Click **Submit** to confirm your selections and begin the Versioning process, or click **Cancel** to start over or **Previous** to return to the Select Plan choice.

NOTE: CodySoft checks to see if your standard or custom version name contains special characters that are not allowed because they cause errors when exporting the files, and displays an error message when they are encountered when you click Submit:

For standard file naming:



For custom file naming:



If your standard or custom version name contains any special characters, you have two options:

a. Click **OK** to proceed with version creation. The special characters will be replaced with underscores in your file name(s).

b. Click **Cancel** to make changes to your file before creating versions.

5. Click the **Versions tab** to access the newly created data-merged version.

6. Download versions as needed. See *Downloading Versions.*

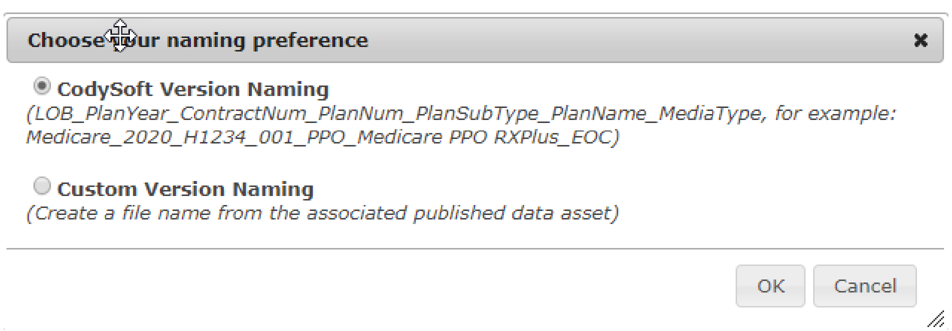
   NOTE: CodySoft removes blank rows and end of row paragraph marks in all tables in your documents as part of the Versioning process.

   CodySoft updates all Tables of Contents in your document with any page number changes and any new, changed, or deleted headers also.

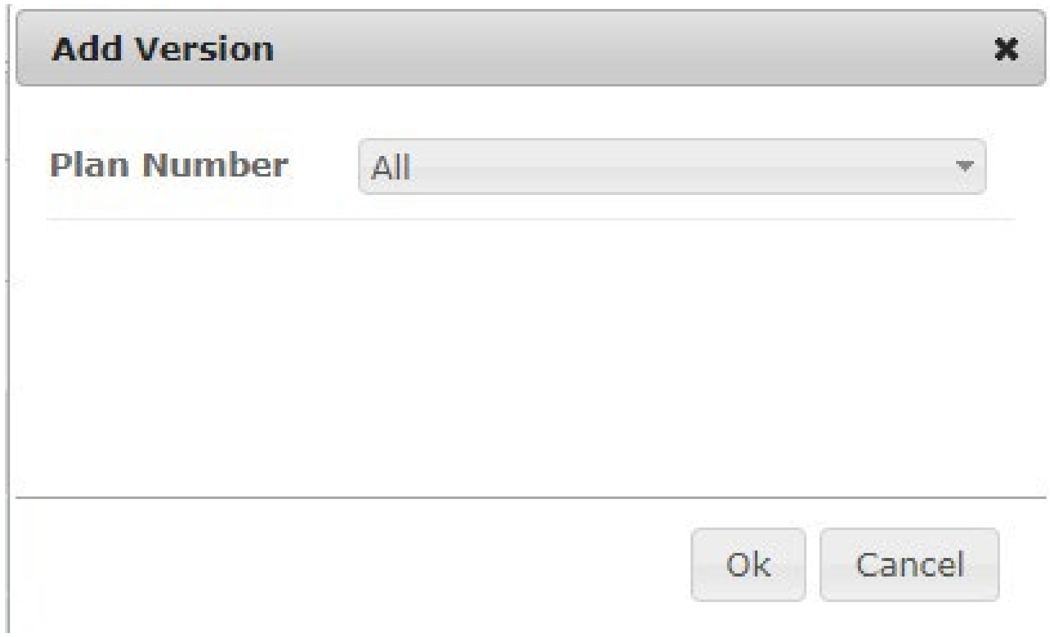
   You receive a notification when versions are created. If any versions fail, you receive a notification identifying the reason the version failed.

Creating a version from a CodySoft® Editor Template (Non-MCE Projects)

1. Versions are created from approved CodySoft® Editor and File templates only. See *Approving a template.* **Excel Templates cannot be versioned. If you have an Excel template that needs to be versioned after it has been finalized, upload the final template version as a "file" template.**
2. In the project record, click the **Templates** tab.
3. Click the **Create Version** icon . Click the **Create Version** icon . The Choose your naming reference dialogue displays:



c. Select CodySoft Version Naming to use Cody's standard naming convention. The **Add Version** dialogue displays:

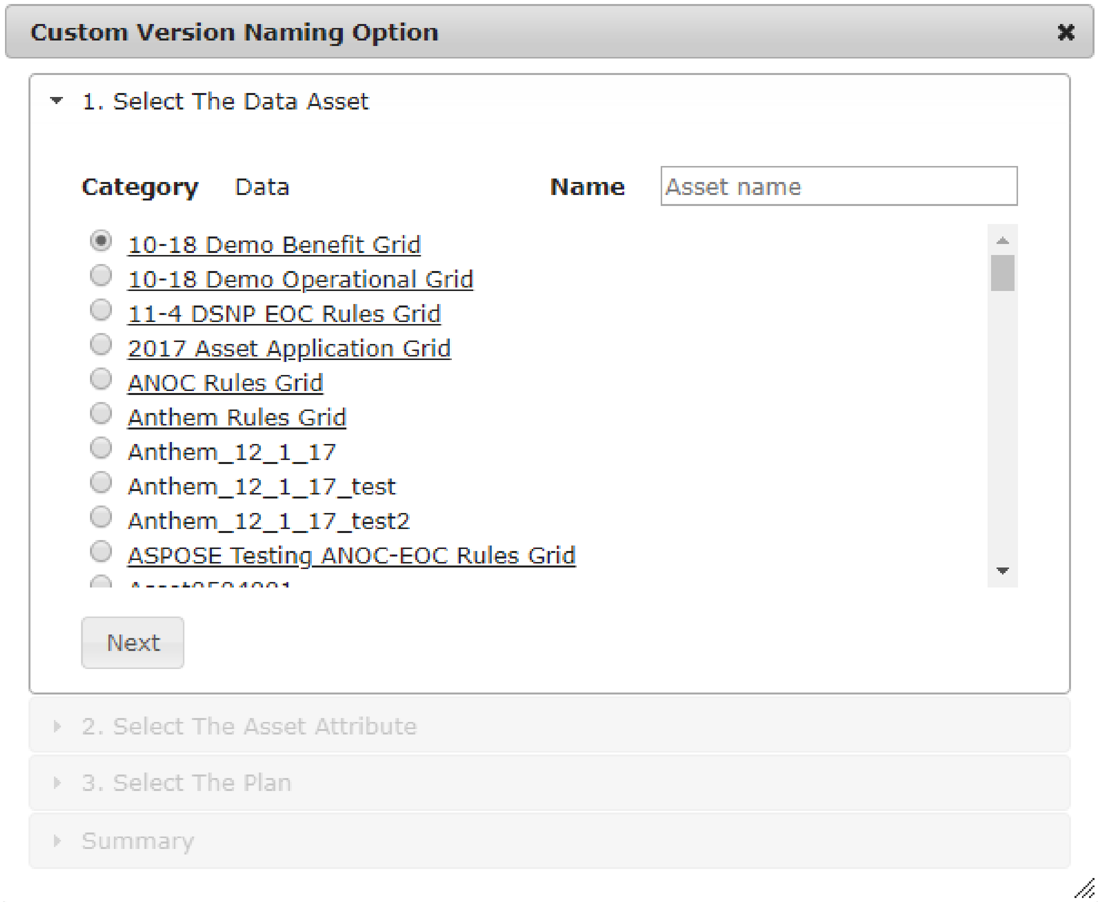


i. In the **Add Version** box, **Plan Number** – If a plan number is associated with this version, select the appropriate number from the drop-down list.

ii. ii. If a version is to be created for all plan numbers, select **All** from the drop-down list.

iii. Click **OK**.

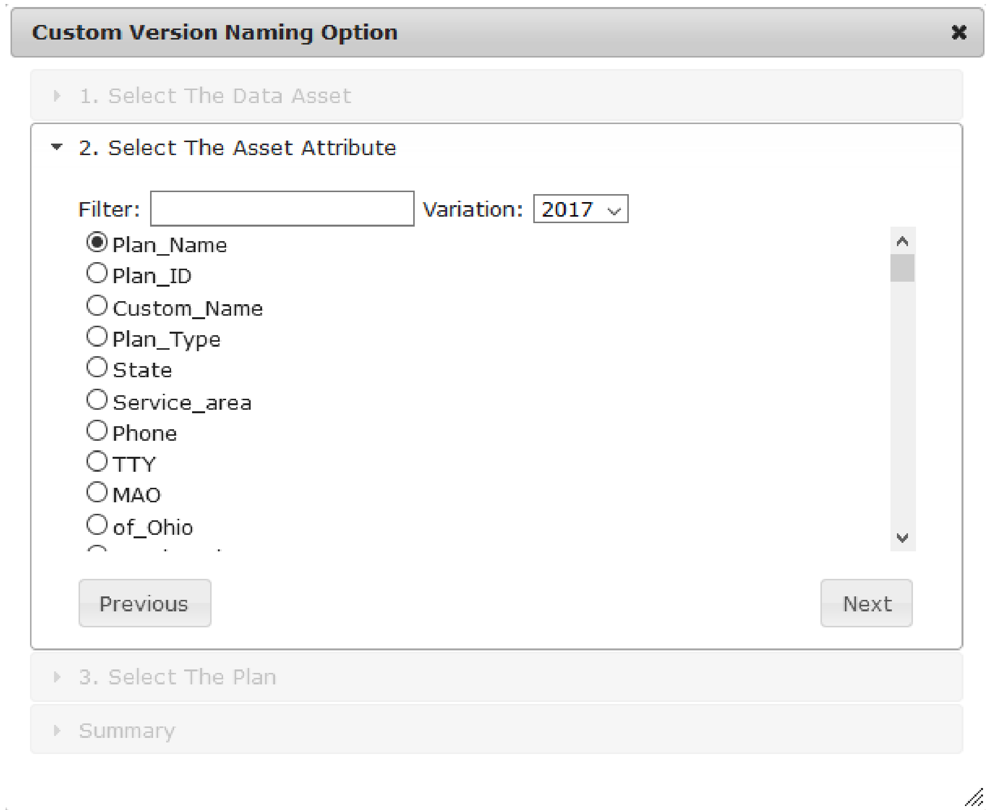
c. Select Custom Version Naming to create a unique name based on the associated data asset. The Custom Version Naming Option dialogue displays:



i. Select the data asset associated with this plan or plans

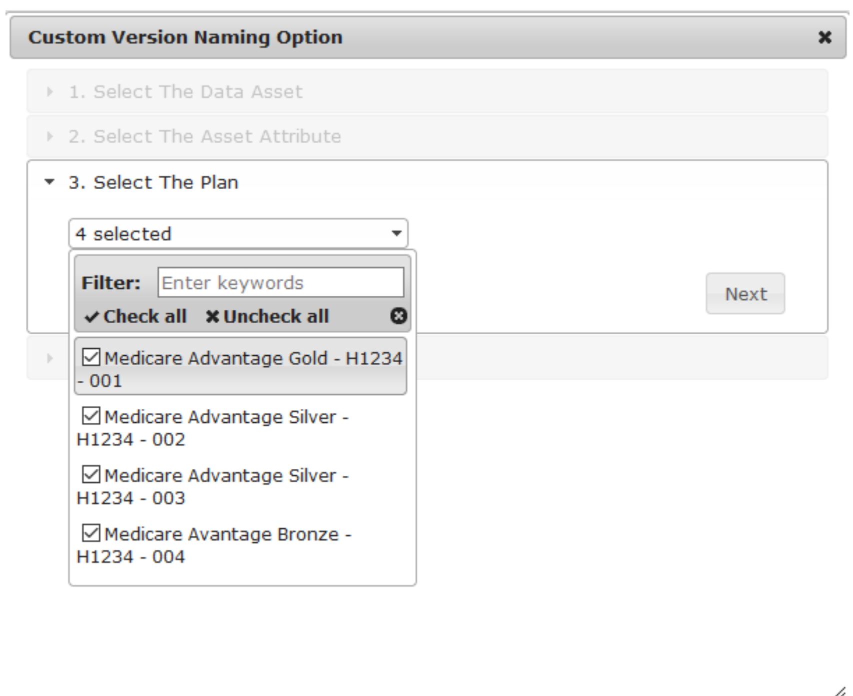
ii. Click **Next**

i. Select the Asset Attribute and Variant to use as part of the custom name.



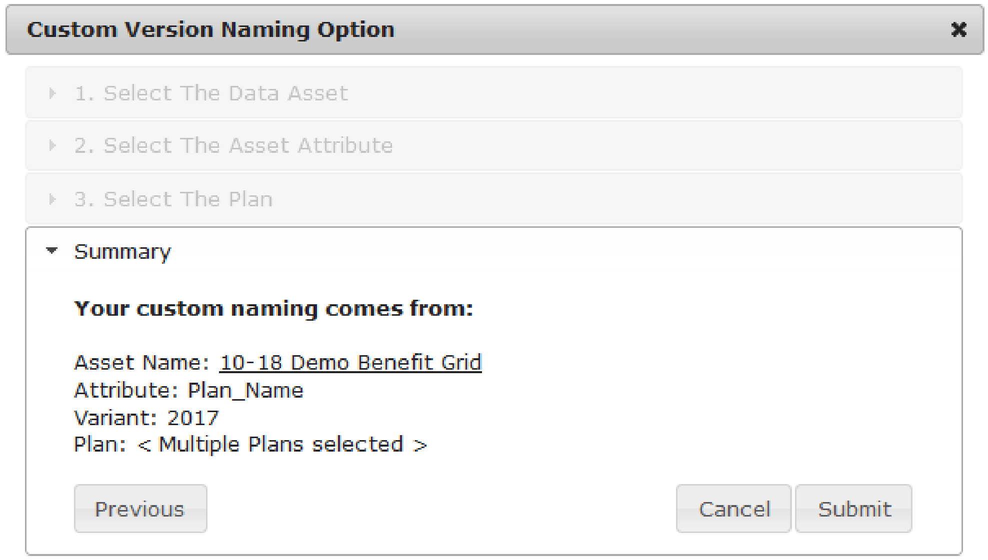
ii. Click **Next** to continue or **Previous** if you need to go back to the Data Asset choice

iii. Select the plan from the dropdown list:



iv. Click **Next** to continue or **Previous** if you need to go back to the Asset Attribute and Variant choice

v. Review your selections:



vi. Click **Submit** to confirm your selections and begin the Versioning process, or click **Cancel** to start over or **Previous** to return to the Select Plan choice.

6. Click the **Versions** tab to access the newly created data-merged version.

7. Download versions as needed. See *Downloading Versions.*

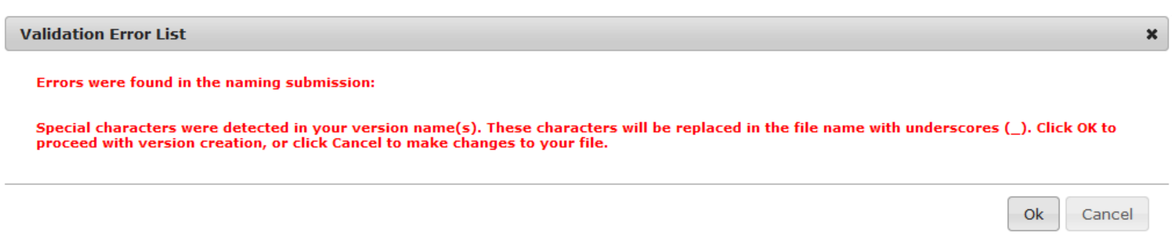
   NOTE: CodySoft removes blank rows and end of row paragraph marks in all tables in your documents as part of the Versioning process.

   CodySoft updates all Tables of Contents in your document with any page number changes and any new, changed, or deleted headers also.

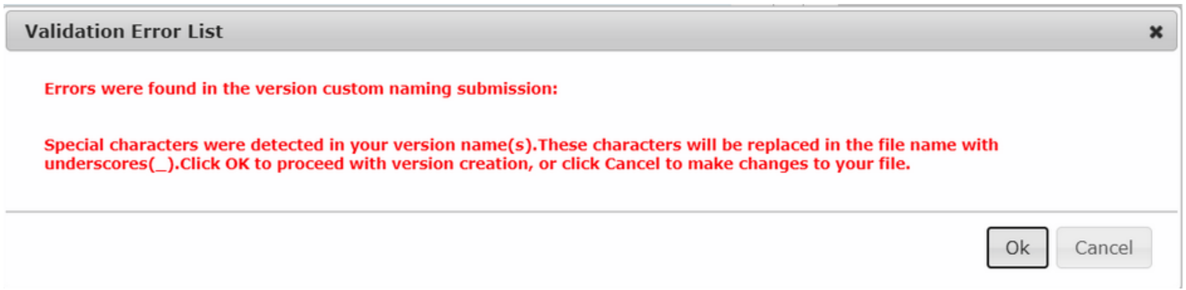
8. Review your selections and click **Submit**.

   NOTE: CodySoft checks to see if your standard or custom version name contains special characters that are not allowed because they cause errors when exporting the files, and displays an error message when they are encountered when you click Submit:

   For standard file naming:



   For custom file naming:



If your standard or custom version name contains any special characters, you have two options:

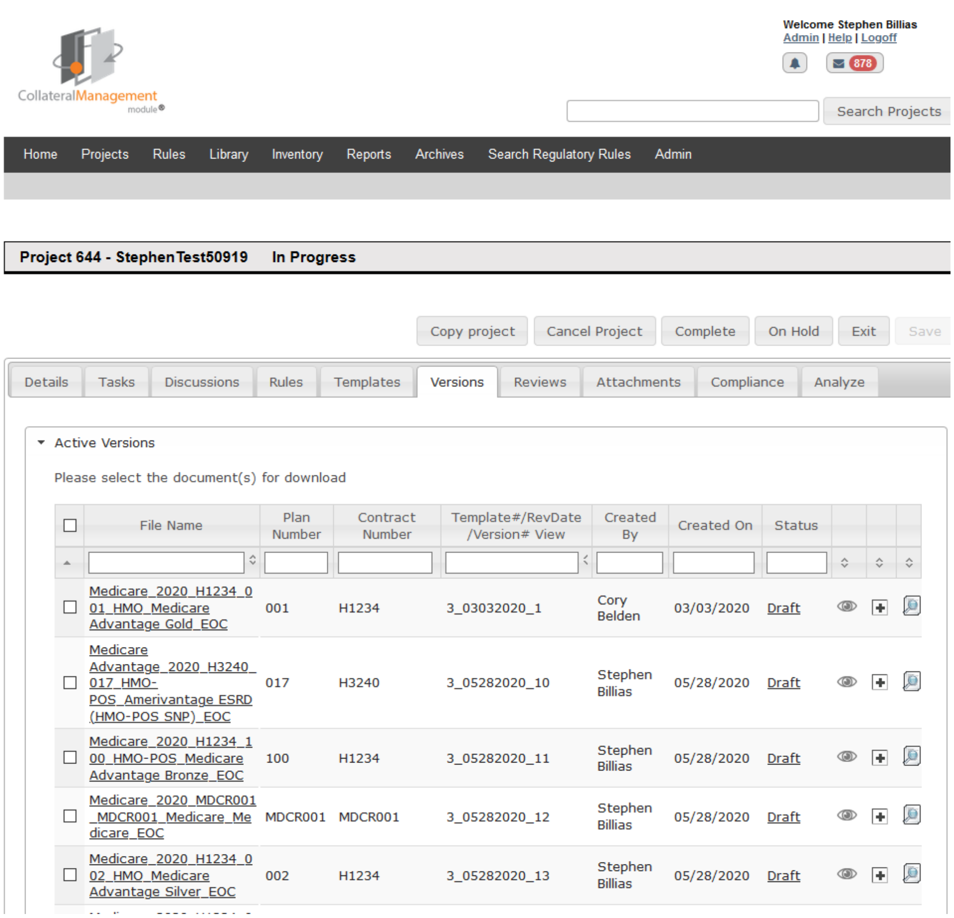
a. Click **OK** to proceed with version creation. The special characters will be replaced with underscores in your file name(s).

b. Click **Cancel** to make changes to your file before creating versions.

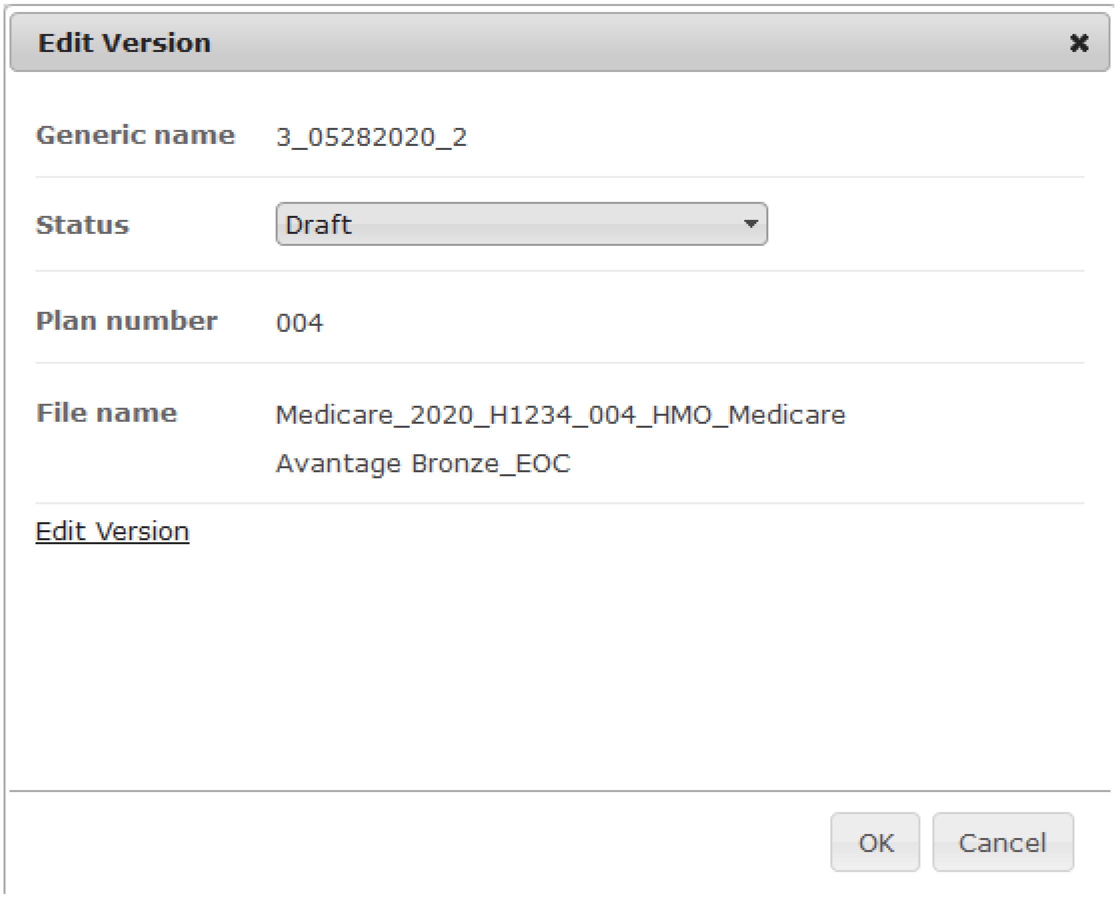
You receive a notification when versions are created. If any versions fail, you receive a notification identifying the reason the version failed.

Editing a Version

You can edit versions you have created. The list of versioned documents displays on the Versions tab:



1. Click the name of any document in the File Name column. The Edit Version dialog box displays:



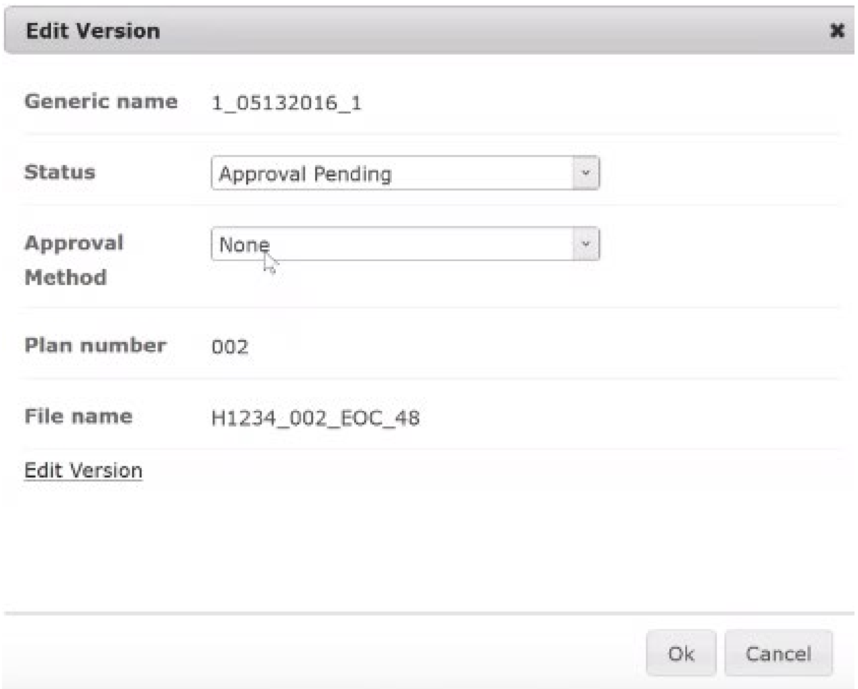
2. Click **Edit Version**.
3. Edit and save your file. Your changes are included in the version and Tables of Contents (TOCs) in the document are updated automatically as needed based on the changes you made.

Approving or Declining a Version

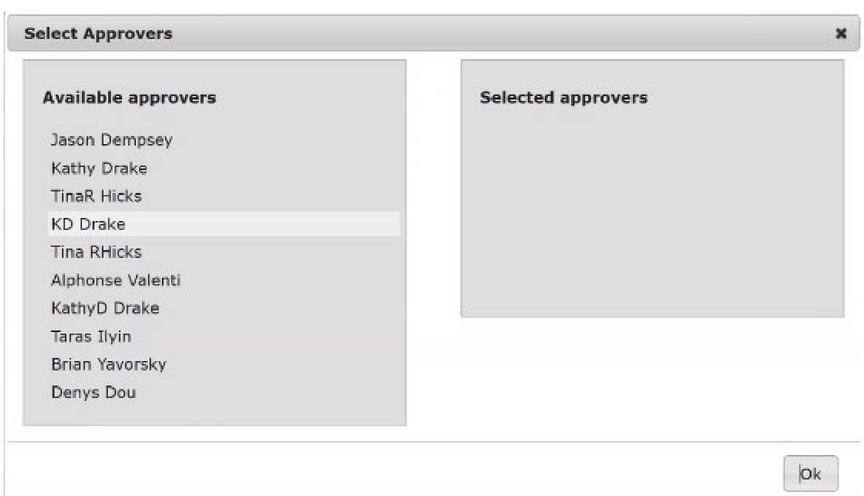
Obtaining Final Approval

When document versions have been reviewed and edited based on review comments, you are ready to obtain final approvals on the documents.

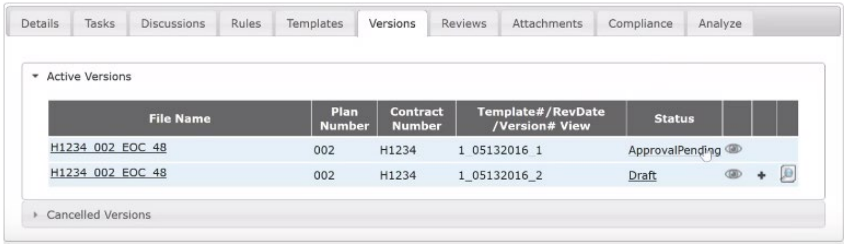
1. On the Versions tab, click the filename. The Edit Version dialog box displays:



2. Change the **Status** to **Approval Pending**
3. Identify the **Approval Method**, either Concurrent or Routing
4. Select approvers from the list:



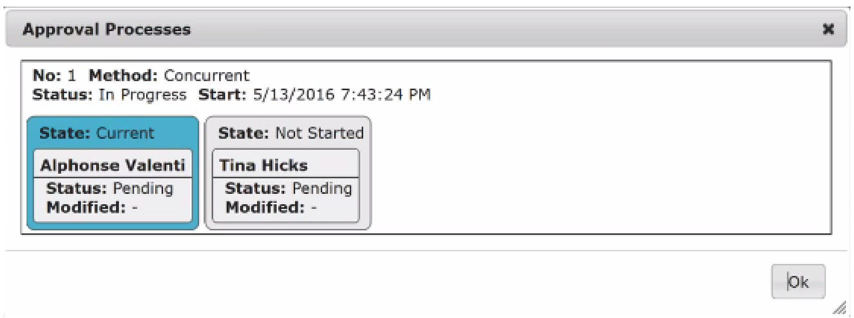
5. Click **OK**. The document now displays as Approval Pending on the Versions tab:



NOTE: You cannot edit a document in Approval Pending status. If you try to Edit Version, you receive a message:

"Version can't be edited while in Pending approval status".

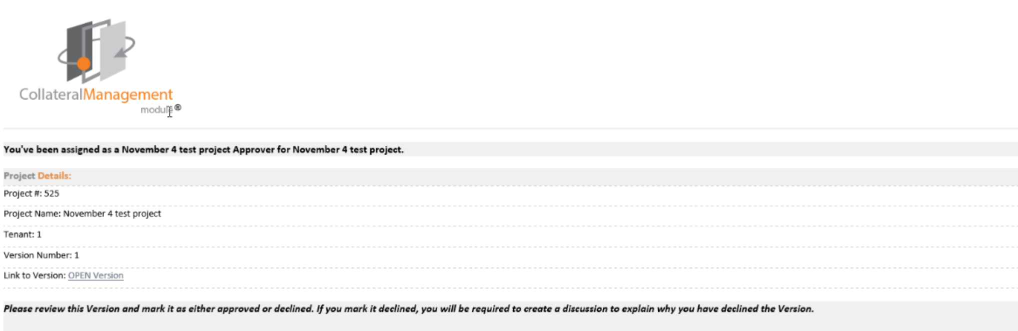
6. Click the link in the Status column of a template to see the Approval Process status dialog:



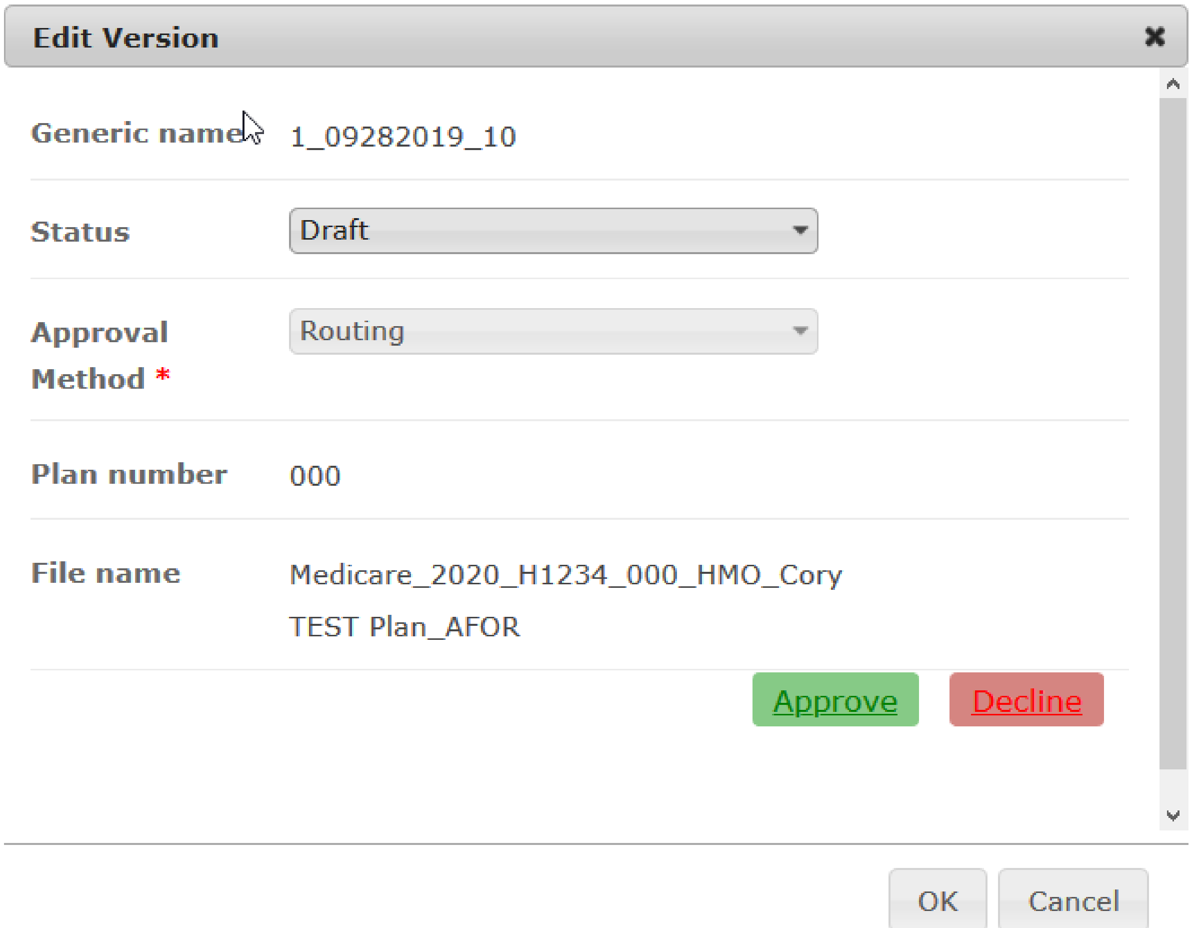
When all the approval tasks are completed and signed off, the version is complete and ready for approval.

Approver Notification

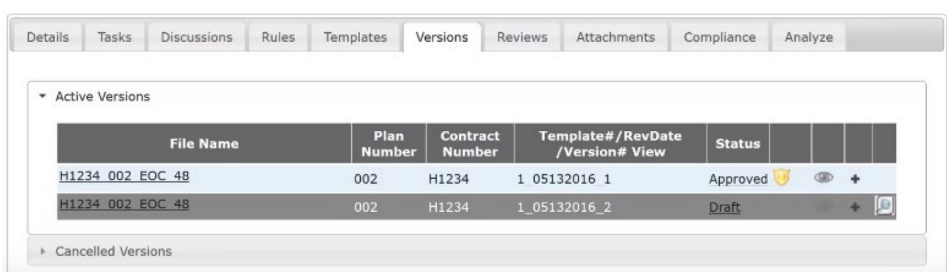
If you are an approver, you receive a notification message for approval of the version:



1. Click the Version link to access the version. The Edit Version dialog displays:



2. Click Approve. The status updates from Approval Pending to Approved in the versions list, and the shield icon displays on the version row:



Create a Compliance Record

Follow the steps to complete the approval of the version by creating a Compliance record.

1. Click the shield icon on an approved version to create a Compliance record
2. Select the Compliance Type from the drop-down list
3. Select the Submission Type from the drop-down list

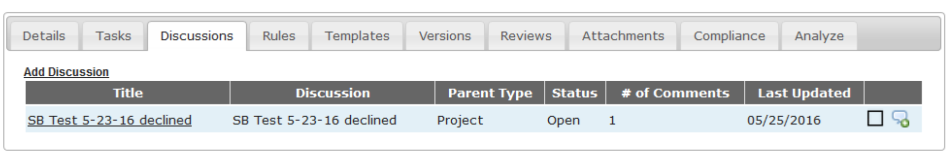
4. Enter the Submission Date
5. Click **OK**
6. On the Compliance tab:
    a. Click the File Name of the document for which you want to create a compliance record
    b. Enter the Disposition Date
    c. Change the Status to CMS Approved
    d. Click OK
7. On the Versions tab:
    a. Click the File Name
    b. From the drop-down list in the Status field, change the Status to Complete. The document is published to the Final Version list in the Library as a completed Compliance Record.

Declining a Version

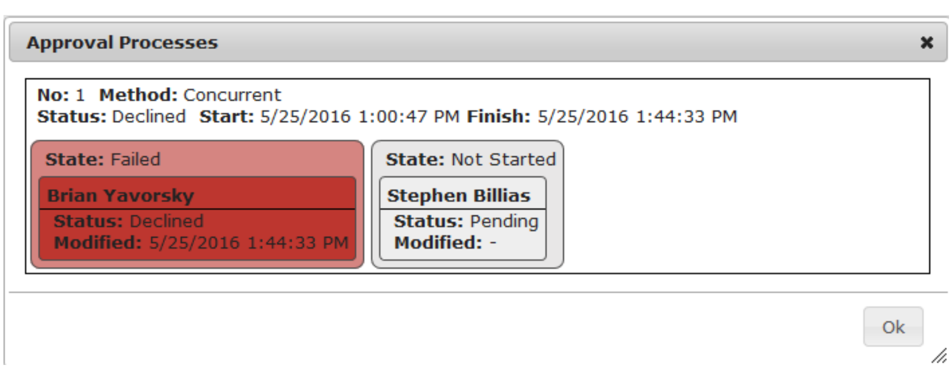
To decline a version:

1. Click the **filename** from Review tab
2. Click **Decline**
3. Add a **comment** why you are declining the version
4. Click **OK**

After you decline the version, the version shows as declined with a discussion icon. Click the discussion icon to see the comment.

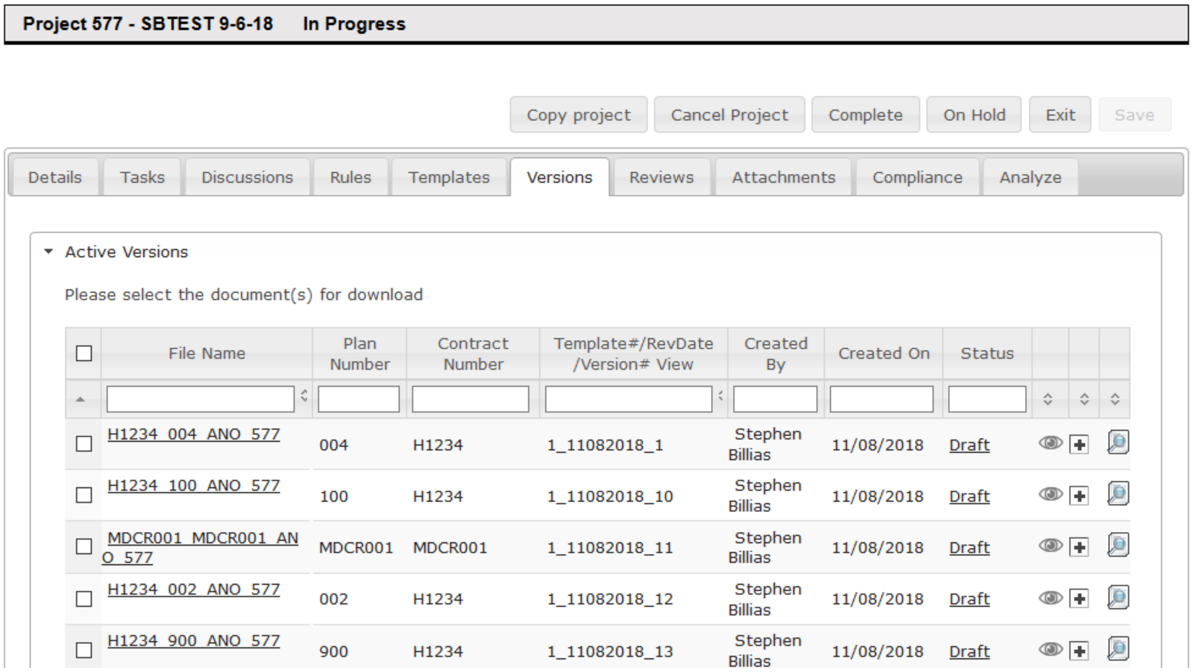


The version is returned to Draft status. Click the Status column on the Versions tab to see Approval Processes dialog box that provides information on the approval process.

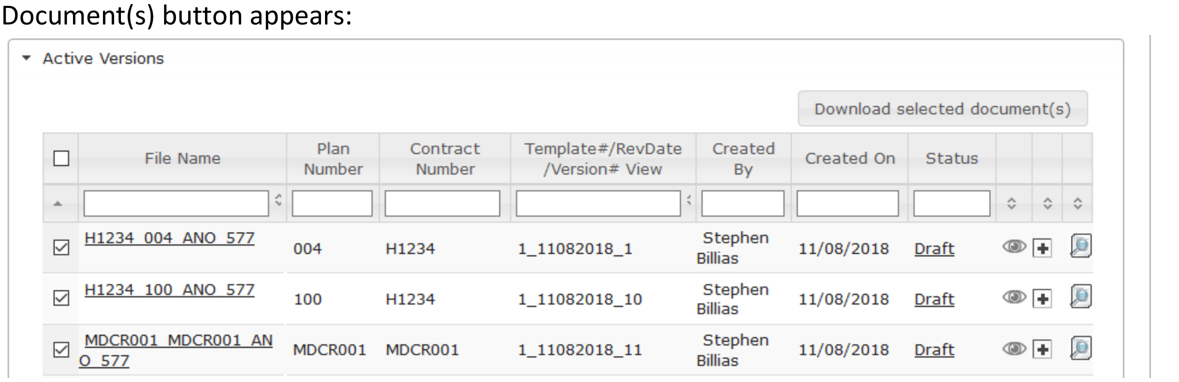


Downloading Versions

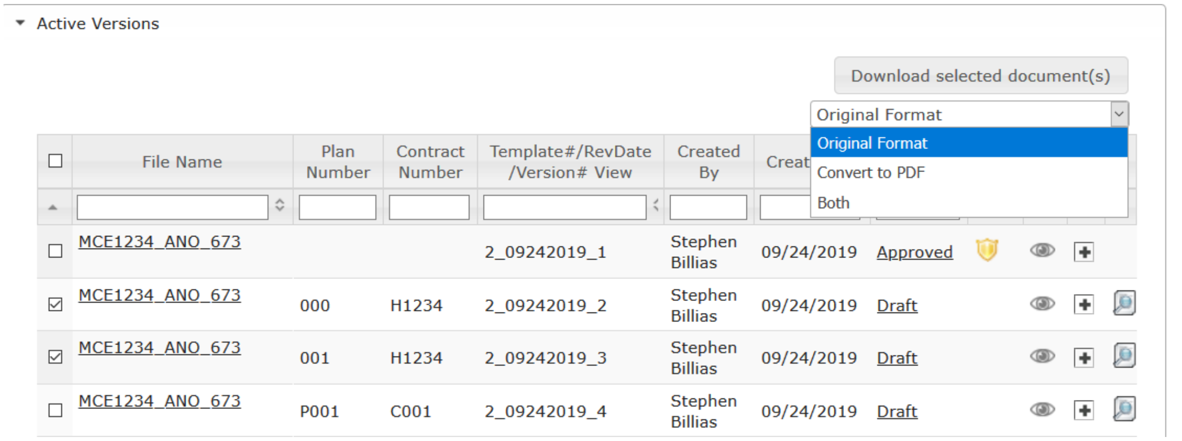
1. You can download multiple versions at one time. From the home page of an individual project, select the **Versions** tab. The Versions tab lists all active versions that have been generated:



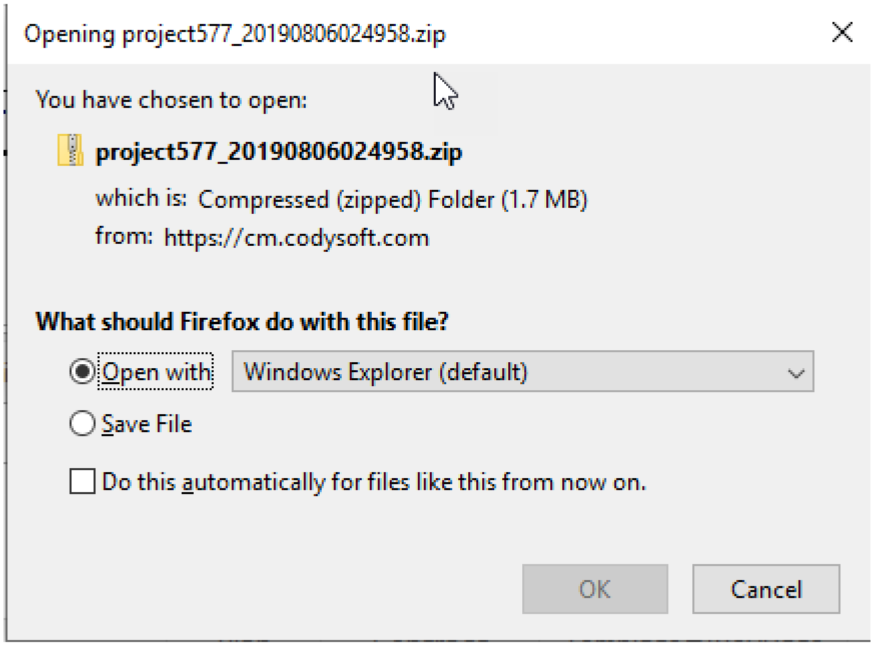
2. Select the checkbox in the upper left to select all plans for download, or select the checkboxes for the plans for which you want to download active versions. You can filter on any column, for example, File Name or Plan Number, to narrow your search for the plans you want to download. As soon as you make a selection, the Download Selected Document(s) button appears:



3. Select whether to download in original format, for example Microsoft Word, as PDF, or in both formats:



4. Click **Download Selected Document(s)**. The standard download dialog box appears:

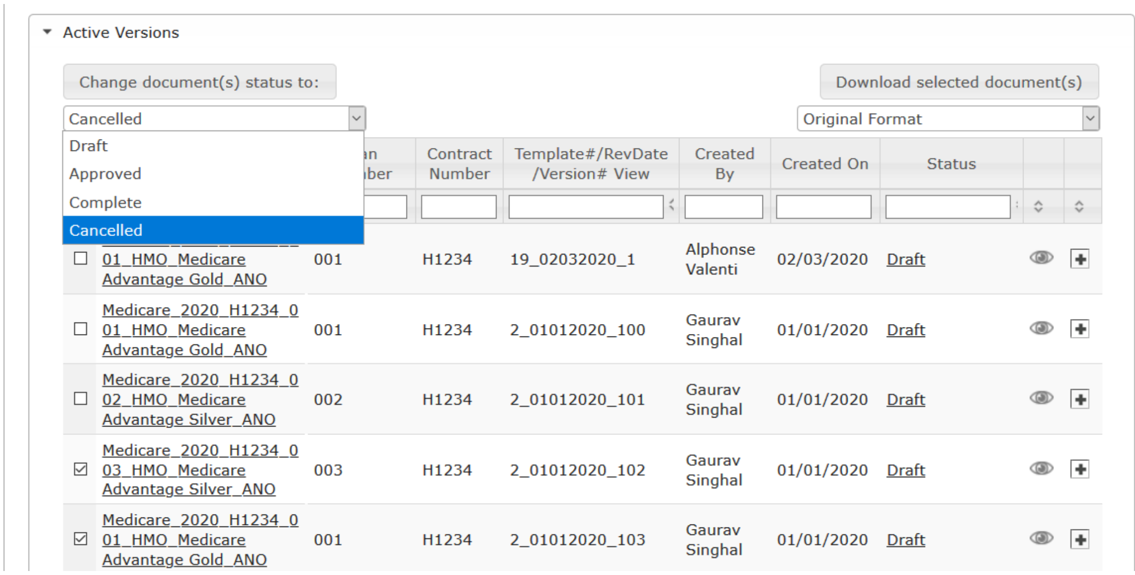


5. Open or Save the file and click **OK**. Depending on your action, the Zip file opens or is saved to the Downloads folder.
   NOTE that the Zip file name includes the project name and a date and time stamp to identify the download.
   Also note that these documents are reparsed during the download process, and Tables of Contents (TOCs) are updated automatically.

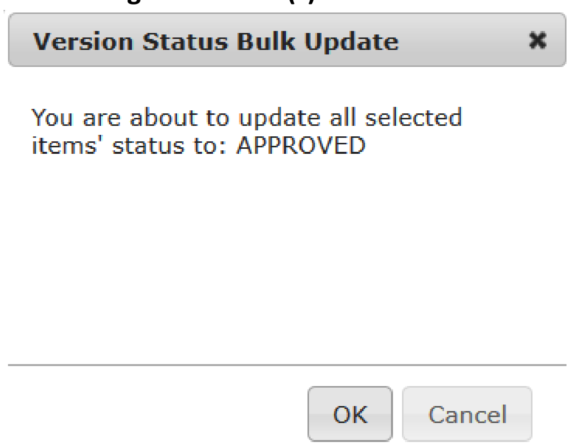
Bulk Change Version Status

You can change the status of versions on the Versions tab using the Change document(s) status dropdown.

1. Select one or more versions to change their status. The Change documents(s) status dropdown displays:



2. Select the new status from the dropdown list.
3. Click **Change document(s) status to**. A confirmation message displays, for example:



4. Click **OK**. The document(s) status changes.

NOTES:

a) You cannot change a document from Draft to Complete status.
b) You can change multiple versions in different statuses to a single new status. For example, you can change Approved and Complete versions back to Draft status using this dropdown.
c) You can change Cancelled versions back to Draft status only, and only on Templates that haven't been cancelled.
d) You cannot change a document to Pending Approval status using the bulk method. This choice is not available from the dropdown list because it requires routing for approval. To route a document for approval, use the standard method of approving a version. See *Approving a Version*.

Tasks and Traffic Management

Traffic Management Functions Roles and Responsibilities

Completing the Project Record (Traffic and Project Managers)

Once you submit a draft project record for review, the Traffic Manager is responsible for either approving the draft project request or for **assigning a Project Manager** to complete this task. To approve a draft project request, the Traffic Manager must complete all required project fields.

Your roles and responsibilities are defined in your profile by your administrator, the person who has admin rights to the CodySoft system. If you are the Traffic Manager responsible for approving new projects, or if you have been assigned as the Project Manager by the Traffic Manager, you are responsible for completing the **Project Record** in the Collateral Management Module®.

The **Project Record** has several tabs. In the **Project Record**, you can upload files, create and review schedules, create documents and discussions, as well as track compliance and regulatory approvals.

To approve a draft project, complete any optional fields on the sub-tabs of the **Details** tab in the project record. All required fields are filled in at the time the project is created and are marked with a red asterisk (*).

The **Details** tab is divided into four sub-tabs:

a. **Project Overview** – Enter general information about your project, including project name and media type.
b. **Project Services/Details** – Specify requested services for your project.
c. **Printing & Distribution** – Identify the document specifications and print quantity as well as distribution instructions.
d. **Requestor Info** –Include your contact information as well as budget and cost center information.

1. **Project Overview** – Complete any optional information:
   - **Document Type** – Indicate whether you are using a model document or creating a non-model document.
   - **Required/Optional** – Capture whether the material you are creating is required or optional.
   - **Job Number** – **This** is an auto-filled field with the project number.
   - **Name** – Enter a specific name for your project (for example, “Classic Gold HMO MAPD direct mail for Nov seminars”). This field is populated when you fill out the initial Create Project fields and can be changed here.

- **PR Number** – This is the number of the project request that preceded the Job Number (project number), which is no longer in use in CodySoft. The PR Number displays only for legacy projects.
- **Description** – Enter specific details about your project (for example, "direct mail piece with BRC for Nov seminars").
- **MCE Project –** If this material is to be submitted under your Multi-Contract Entity identifier (Y number), select this checkbox.
- **Start Date** – Use the calendar widget to select the date the project starts.
- **Budget Estimate** – Enter a preliminary budget number.
- **Budget Actual –** When the project is complete, come back to this tab and enter the final budget amount in this field.
- **Regulatory Project Type –** This is the project request's regulatory project type for purposes of regulation analysis. Select the appropriate project type from the pull-down menu.
- **Media type** – Select your project's media type from the drop-down list (for example, *direct mail, EOC, ANOC, SB)*.
- **Line of Business** – Select the line of business from the drop-down list (for example *Medicare*).
- **Plan Types** – Select the plan types from the drop-down list (for example, *Classic Gold HMO MAPD*).
- **Sub Plan Types –** Select the sub-plan type (if applicable) from the drop-down list.
- **Plan Name/C#/ID**: From the drop-down list, select the checkboxes for the **contract numbers** that apply to this project.
- **Plan Year –** Enter the plan year covered by the communication.
- **Expiration Date** – Use the calendar widget to choose a project expiration date. Once this date has passed, all project information and associated documents are auto-archived.
- **Request date** – This is the date you are submitting your request. It is an auto-generated field.
- **Due Date** – Click the field's box for the calendar widget. Select the date in which you would like the project completed. Use the calendar's arrows to view days of future months.
- **Cost Center** – If your company uses cost centers for accounting purposes, enter the appropriate cost center here.
- **Status** – Displays the current status of the project.
- **PR Approver –** This field displays the name of the person (either Traffic Manager or Project Manager) who approves the project.
- **Project Manager –** Select the user responsible for managing the day-to-day details of this collateral material project from the drop-down list. This field must be populated before the project can be approved.
- **Secondary Project Managers –** Select secondary project managers from the drop-down list. The Secondary PMs have the same access and responsibilities as

the primary project manager, in case a backup is needed or if two or more project managers need to share responsibility for a project.

- **Document developers–** Select document developers from the drop-down list. Document developers are the users who edit documents in the Template editor, and get approvals, do template testing, create reviews and edit, download versions from the Versions tab, and can view, create and edit assets within the library.

2. **Project Services/Details** – Complete any optional information.

- **Requested services** – Select all requested services required for the creation of your material. For a service not included in this section, select "Other" and enter its description in the box provided.
- **Translations –** Select this checkbox if you would like to notify users that a translation is required for this material.
- **Compliance Types**– Select all the compliance types required for your material. For a compliance type not included in this section, select "other" and enter its description in the box provided.
  Note: You must choose a compliance type in this section for your compliance users to create compliance records when documents are submitted to a regulatory agency.
- **Copy Supplied** – Select the Yes option if written copy is included in the request (If you select Yes but do not attach any copy in the **Attachments** tab, you receive a reminder to do so.)
- **Goals/Purposes** – Select your material's goal/purpose from the drop-down list.
- **Tones** – Select your material's tone from the drop-down list.
- **Audiences** – Select your material's audience from the drop-down list.
- **Main Message** – Enter the main message to be communicated by your material.
- **Additional Copy Points** – Enter any additional copy points to be communicated by your material.
- **Required Elements** – Enter all required elements to be included in your material (for example, PFFS disclaimers, logo, Excel table).
- **Final Project Format** – Select from the drop-down list the final format required for production or fulfillment (for example, *InDesign file, DVD*).

3. **Printing & Distribution** – Complete the required information.

- **Finished Size** – Enter the material's finished width and height.
- **Quantity** – Enter the total quantity required.
- **Distribute to All** – When you don't know the exact print quantity, but you do know the material is to be distributed to a specific group (for example, members), select the option for the appropriate group.

- **Paper Stock** – Select the option for your preferred paper stock for the material. For a stock not included in this section, select "Other" and enter its description in the box provided.
- **Color** – Select the required colors for your material.
- **Finishing** – If your material requires special finishing instructions, select the checkboxes that apply for the finishing options.
- **Bleed** – Select whether your material has a bleed edge.
- **Delivery Address1** – Enter the first line of the delivery address for your material.
- **Delivery Address2** – Enter the second line of the shipping delivery address for your material.
- **Delivery City** – Enter the city address for your material.
- **Delivery State** – Enter the state address for your material.
- **Delivery Postal Code** – Enter the postal code address for your material.
- **Delivery Method (Ground, overnight, 2-day, etc.)** – Enter the delivery method for your material (for example, UPS Ground).
- **Business Reply Address1** – Enter the first line of the business reply address if your material requires a BRE (business reply envelope) or BRC (business reply card).
- **Business Reply Address2** – Enter the second line of the business reply address for your material.
- **Business Reply State** – Enter the city business reply address for your material.
- **Business Reply City** – Enter the state business reply address for your material.
- **Business Reply Postal Code** – Enter the postal code business reply address for your material.

4. **Requestor Info** – Complete any optional information.
    - **Requestor name** – As the project requestor, your name is auto-populated based on your log-in.
    - **Email** – As the project requestor, your email address is auto-populated based on your log-in.
    - **Phone** – As the project requestor, your phone number is auto-populated based on your log-in.
    - **Lines of Business –** Your Line of Business (LOB) auto-populates based on your log-in.
    - **Departments** – Select the appropriate departments from the drop-down list.
    - **Business Owners** – Select the names of the material's business owners from the drop-down list.

Once you have filled out the Project Details, you can move to the remainder of the project record tabs.

Overview of project tabs

1. **Details** – Includes four tabs with fields that have been populated as part of the project approval process.
    a. **Project Overview** – general project information, including project name and media type.
    b. **Project Services/Details** – requested services for the project.
    c. **Printing & Distribution** – document specifications and print quantity as well as distribution instructions.
    d. **Requestor Info** – contact information as well as budget and cost center fields.
2. **Tasks** – Create and manage project schedules and tasks. Please see *Tasks and Traffic Management* in this user guide for detailed instructions on how to create and manage schedules and tasks in the Collateral Management Module®.
3. **Discussions** – Create project discussions and add comments. See *Discussions.*
4. **Rules** – Create and manage project rules. See *Rules*.
5. **Templates** – Create or upload templates and create versions. See *Templates Tab.*
6. **Versions** –Access and edit document versions. See *Working with Versions*.
7. **Reviews** – Manage template and version reviews. See *Reviews and Schedules.*
8. **Attachments** –Upload files specific to your project. Attachments from the initial project request form are also included in this tab.
9. **Compliance** –View the disposition status of a version's compliance and regulatory approvals.
10. **Analyze** (For Collateral Management Module® users with access to CodySoft®'s **Regulatory Analyzer®** Module) **–** Generate and view reports from the **Regulatory Analyzer®'s** database of regulations. (If you do not have access to this module and would like more information regarding the Regulatory Analyzer®, please contact your CodySoft® system administrator.)

Searching for projects using the search function

1. From the dashboard, select **Projects**
2. From the project choices, click **Search Projects**.
3. Enter the following information:
    a. **Name** – Enter as much as you know of the project's name.
    b. **Status** – Select the project's current status (or select "all statuses") from the pull- down menu.
    c. **Media type** – Select the project's media type (or select "all media types") from the drop-down list.
    d. **Job number** – Enter the project's job number, if you know it.
    e. **PRNumber** – Enter the project's project request number, if you know it.

4. Click **Search** (on the bottom right side of the screen). Search results appear below the gray bar.
5. To access a project record, click the project's job number.

Creating a new project from an existing project (Copy project function)

1. Open any Approved Project.
2. In the project record, click **Copy Project** on the upper right side of the screen.

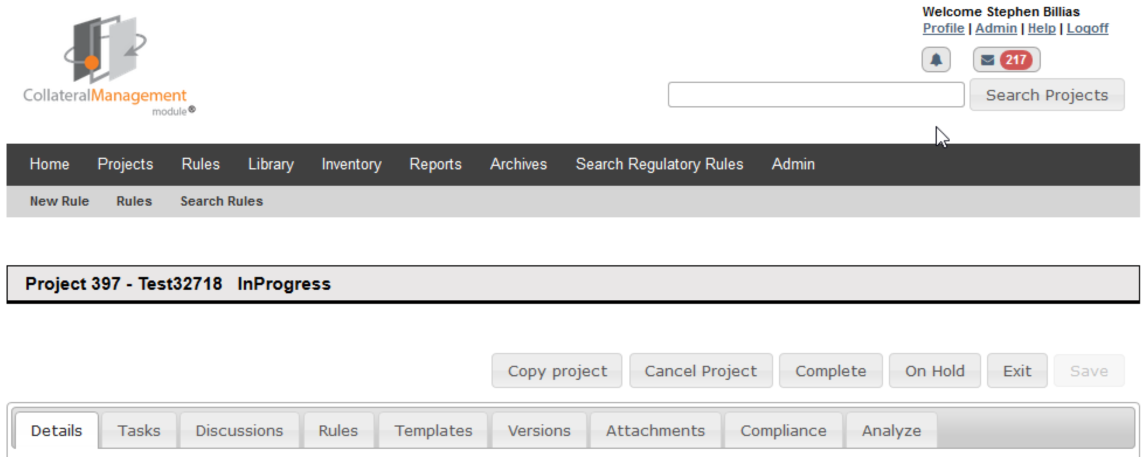
3. On the **Details** tab, update the content for all fields and sub-tabs, as necessary, including the **Project Manager** field. Make sure the name of the project is unique from the project it came from.
4. Click **Exit** on the upper right side of the screen. The status shows as Approved on the **Project Overview** tab. The new project or job # displays on the **Project Overview** tab.

Project Statuses: Approving and Declining New Projects

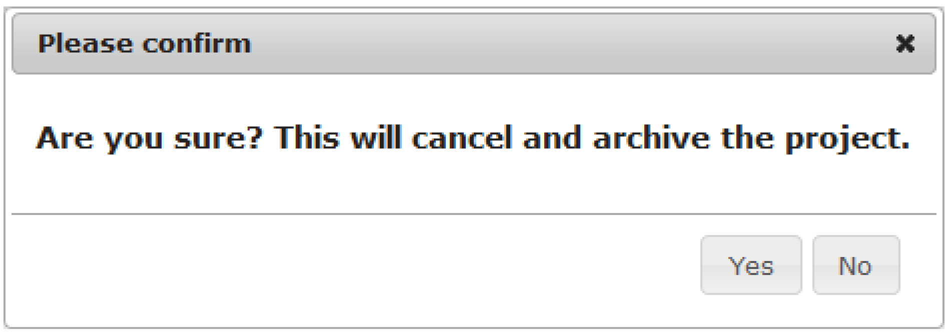
1. From the **My Projects** section on your dashboard, you can access Draft Projects and update statuses by clicking on the **Project Number**.
2. In the **Project**, the **Status** field is located at the bottom of the project record.

Project status options:

1. **Submitted** – Draft Project status.
2. **Approved** – Project status. You can only approve a project once, while it is in Submitted status. Once you approve a project, you have the following options:
3. **In Progress** – selected after project schedule is created and tasks are assigned. A project can only move to an "In Progress" status after it has been approved.
4. **On Hold** – selected when a project needs to be placed on hold until it can become active again. Only "Approved" or "In Progress" projects can be placed on hold. You cannot place a project "On Hold" from the submitted status.
5. **Cancelled** – selected when a project is cancelled. Projects can only be cancelled from an "In Progress," or "On Hold" status. To cancel a project:
   a. Click **Cancel Project**



b. A confirmation dialog displays:



c. Click Yes to cancel and archive the project.

6. **Completed** – selected when a project is completed.

Submitted Status for Projects

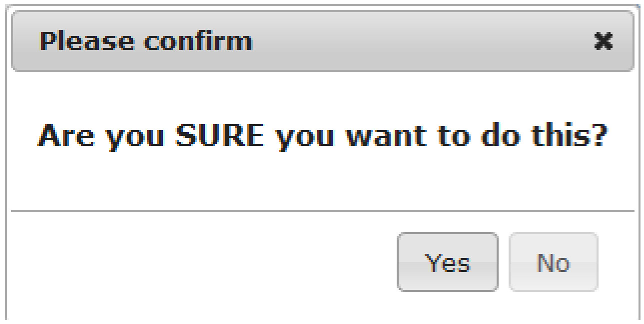
When a Project requires clarification or more information before it can be approved as a project, the **Submitted** status is used.

After a project has been approved, it can move to the other status options in the Collateral Management Module®.

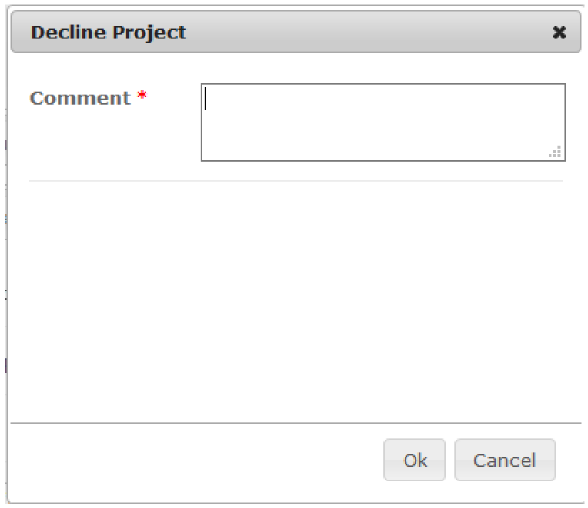
Submitted Project options

When a project is in a Submitted state, you have three options:

1. **Assign Project Manager –** You can assign a Project Manager to a project before approving it, thereby passing the approval responsibility to that person. Once you assign the **Project Manager,** that user is notified that he or she has been assigned to this project.
2. **Approved** – reviewed and approved as a project by the Traffic Manager. To approve a project, complete all the required fields and click **Approve**.
3. **Declined** – project request is rejected. To decline a project:
   a. **Click Decline**
   b. In the Confirmation dialog, click **Yes**.



c. In the decline Project dialog, enter a Comment as to why the project is being declined.



d. Click **Ok**.

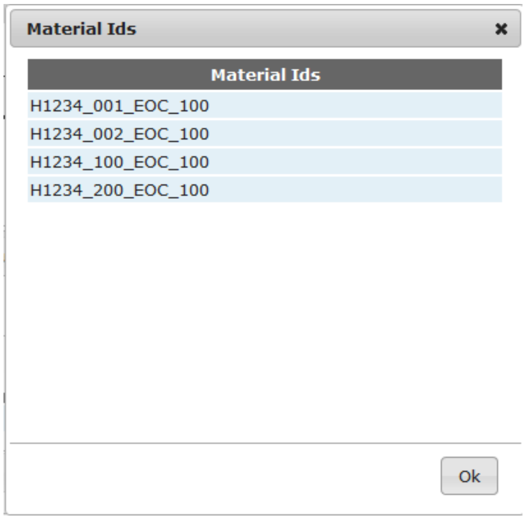
Approved status for Projects

1. On the Project Record, review all content on each tab to ensure the necessary information has been entered.
2. Edit the project information as needed.
3. When you are ready to approve the project, click **Approved** at the top of the project record.
4. Select the project's **Project Manager** from the **Project Manager** drop-down list at the bottom of the screen.
5. Click **Exit**.

View Material Ids:

When a project is approved, you can view the material Ids for the project:

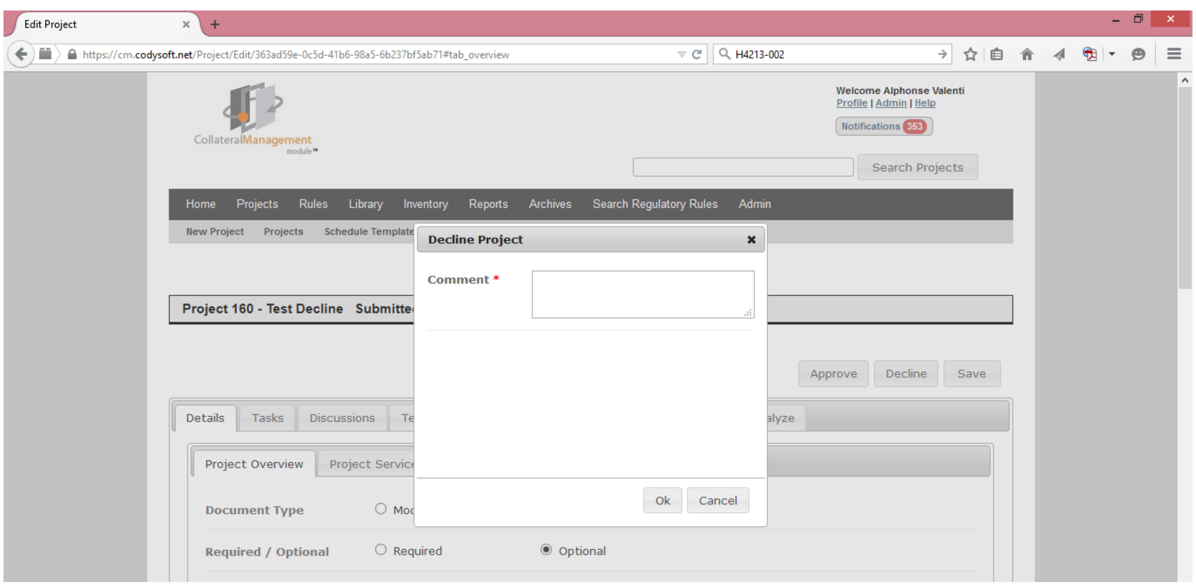
1. In the **Project Record**, click the **Versions** tab.
2. Click **View Material Ids**. The material Ids dialog box displays.



3. Note the **material Ids.**
4. Click OK.

Declined status for Projects

1. When a project cannot be approved, the **Declined** status is used.
2. On the Project Request Form, click **Decline**.
3. At the confirmation prompt, click **Yes**.
4. The **Decline Project** box appears.
5. Enter a comment to explain why the Project is being declined.



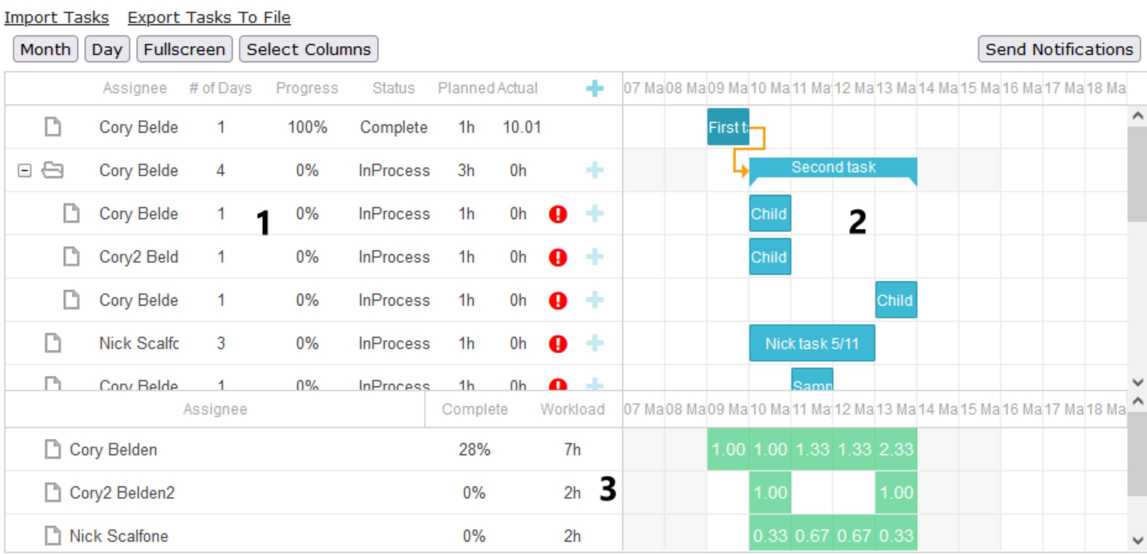
6. Click **Ok**.

Task Management

When a new project has begun, the **Traffic Manager** creates its project schedule, creating and assigning tasks. The Tasks tab is a GANTT-based visual view of the project's tasks, with tools for creating, assigning, editing, and managing project tasks.

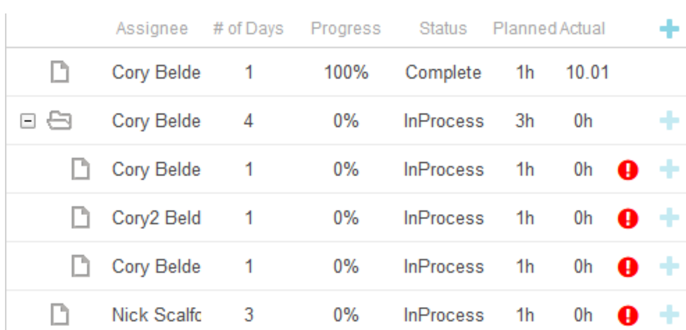
Screen Layout

The Tasks tab screen is divided into three sections:



Columnar View (1)

Provides the task information in columnar format, including these fields:



- **Assignee**—who is assigned the task. Each individual task can have only one assignee.
- **# of Days**—Planned duration of the task in days
- **Progress**—Percent complete of the task, if any. Tasks not started show 0%
- **Status**—The status of the task. The status may be one of these values:
  - **Pending**—The task has not yet started. This could be because the project is not yet set to In Progress, or the start of the task is dependent on the completion of prior

task

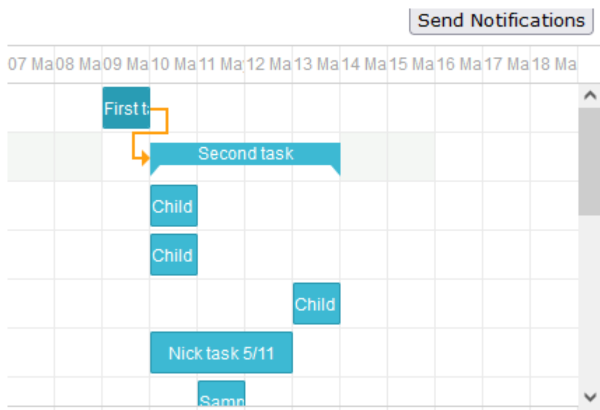
- ○ **In Process**—The task is being worked currently
- ○ **Complete**—The task has been completed and Actual hours entered

- **Planned Hours**—Estimated hours it would take to complete the task
- **Actual Hours**—Hours it took to complete the task. This number may be updated as progress occurs on the task. This value is stored once the task is completed.

Gantt View (2)

The Gantt view provides the task information in a visual format, and is interactive in many ways.

- Double click a task to open it for editing
- Click and drag a task in either direction to change its start and end dates

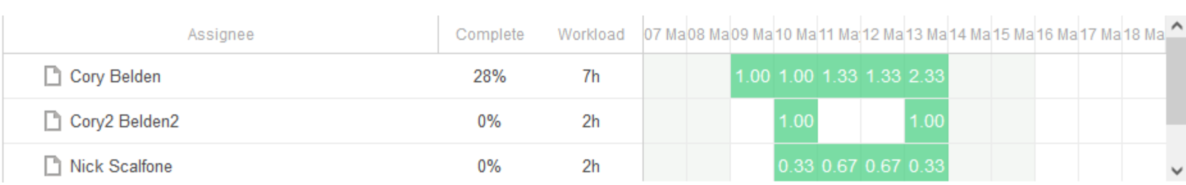


Resource Allocation View (3)

The bottom portion of the screen displays the current resource allocation of project team members on a given project. The left side of the resource area displays high-level information on each resource:

- **Assignee** — The name of the resource
- **Complete** — The percentage of the resource's workload that is completed
- **Workload** — The number of hours currently assigned to the user

The right side of the resource area displays the resource's allocation in hours



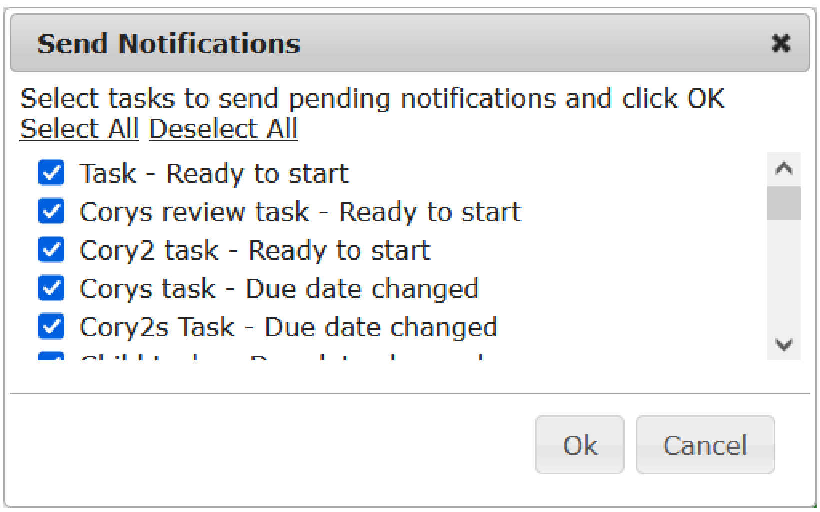
Assignee	Complete	Workload	07 Ma	08 Ma	09 Ma	10 Ma	11 Ma	12 Ma	13 Ma	14 Ma	15 Ma	16 Ma	17 Ma	18 Ma
Cory Belden	28%	7h			1.00	1.00	1.33	1.33	2.33					
Cory2 Belden2	0%	2h				1.00			1.00					
Nick Scalfone	0%	2h				0.33	0.67	0.67	0.33					

Navigation

Several buttons aid navigation on the Tasks tab:

- **Month** — Displays tasks by month
- **Day** — Displays tasks by day
- **Fullscreen** — Opens the Tasks tab in a full screen view
- **Select Columns** — Allows the user to select which columns display. Note this is not stored and is reset once the page is refreshed or navigated away from.
- **Send Notifications** — Sends unsent notifications that have been created by task activity, such as adding a new task, changing the start or due date, the task duration, or assignee.

  1. Click **Send Notification** to send any unsent notifications that are queued up. The Send Notifications dialog displays the task name and the notification type that is queued up:

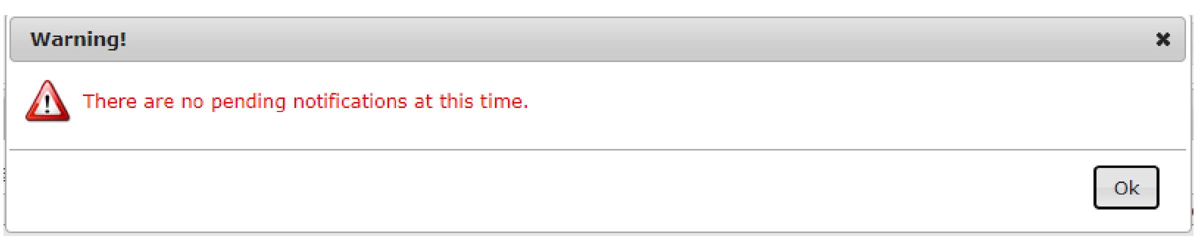


  2. Click **Ok** to send all notifications

     or

  3. Deselect the checkboxes for any notifications you don't want to send yet
  4. Click **Ok**.

NOTE: If you click Send Notifications and there are no pending notifications to send, you'll receive a message:

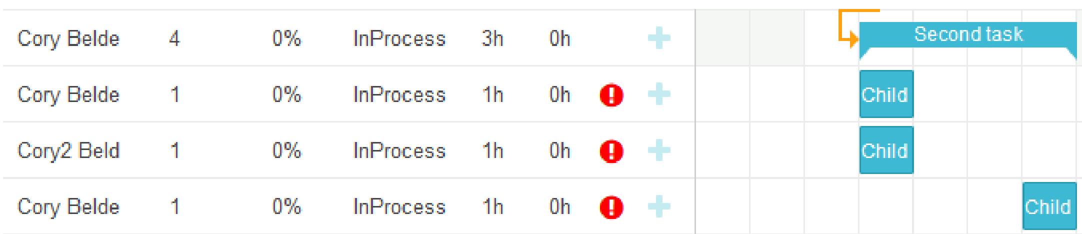


If you deselect all pending notifications, you'll receive a message:

The exclamation point on a task may mean that there is another issue than unsent notifications. See *Exclamation Point for Outstanding Task Issues*.

Parent-Child tasks

The task scheduler uses the concept of parent and child tasks. A parent task is a main task that has several child tasks associated with it to form a grouping. These may be independent tasks that all occur at the same time, or they may be dependent tasks that occur in a series.



When dragging Parent tasks earlier or later in the calendar, Child tasks move as well. Dragging child tasks moves the parent task also, expanding the start and end dates of the Parent task as needed.

Example 1:

If a parent task needs to be pushed out 2 days, all child tasks to that parent task follow this movement. All child tasks move out 2 days when the parent task is moved out.

Example 2:

When a child task is moved it will expand or contract the dates of the parent task accordingly. If you move a child task outside of the existing range, the parent task will adjust as it is made up of the contents of the child task(s) within it.

Dependencies

The task scheduler uses the concept of dependencies to drive things that need to occur in a specific sequence and cannot begin until prior tasks are completed.

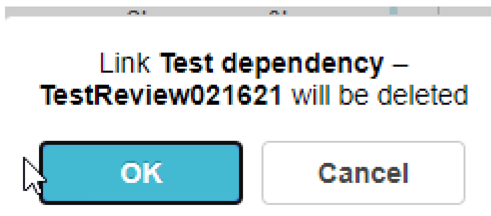
To create a dependency:

1. Click and drag from the round end point on the right side of a task  to link it to another task, which will be dependent on the task from which you dragged from.

2. A line appears, connecting the two tasks, with an arrow to indicate the hierarchy of the dependency, as in this example:

To delete a dependency:

1. Double-click the arrow that created the dependency. A confirmation message displays:



2. Click **OK** to delete the dependency

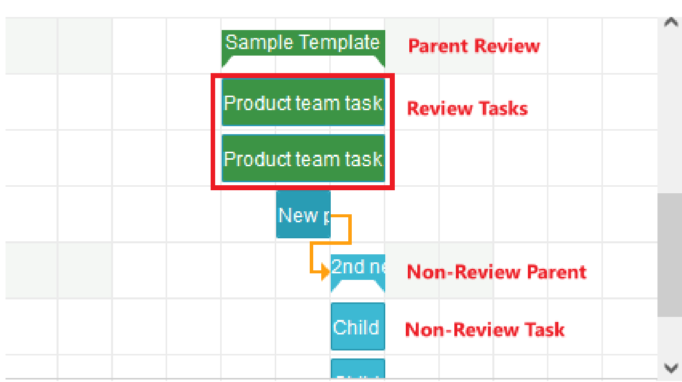
Review tasks

Review tasks are created from the Templates tab in the project See *Review Process for Project Managers*.

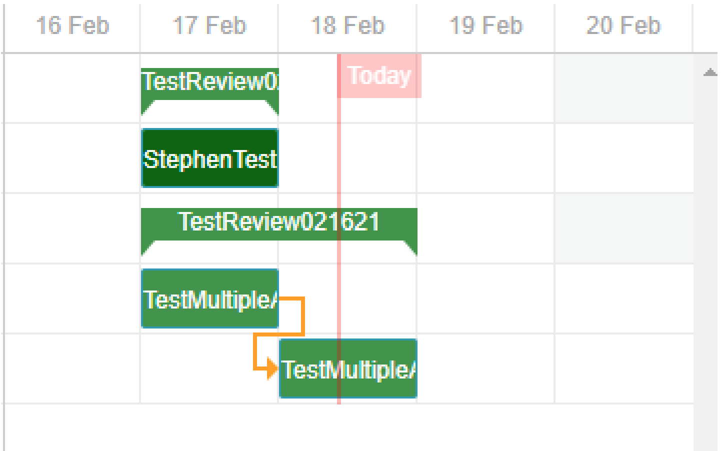
Color coding and shape of task bars

The Gantt chart provides color coding to help you read the information:

- Review tasks display in green
- Non-Review tasks display in blue
- Parent tasks have different-shaped bars, with down-pointing markers to indicate start and end dates

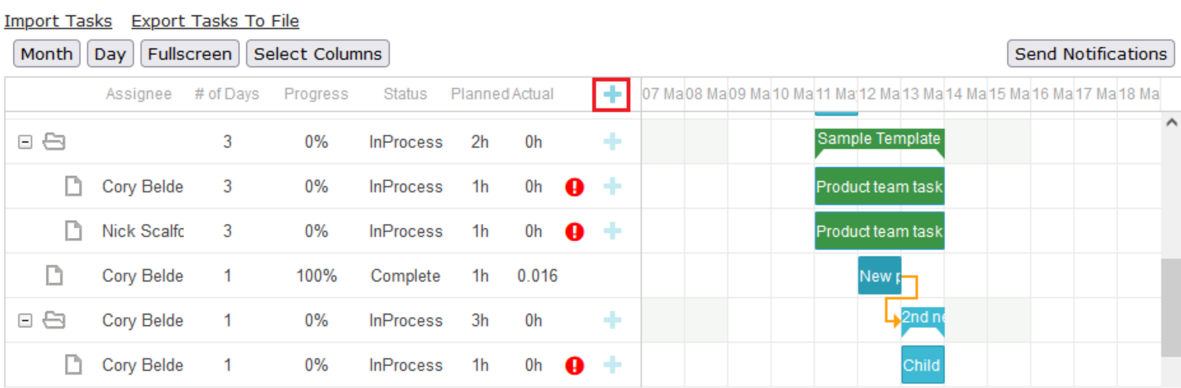


- The Gantt view shows today's date as a vertical line in the in center of the display:

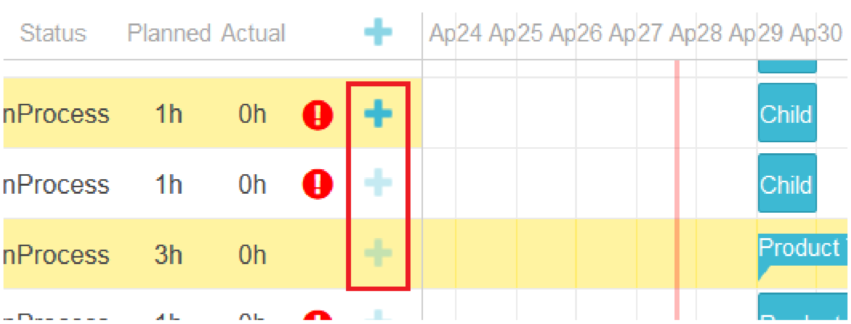


Plus sign to add tasks

Click the plus sign (+) in the header row to add a new top-level Parent task



Click the plus sign (+) next to any non-complete task in the list to add a new child task beneath that task



Update Task Progress

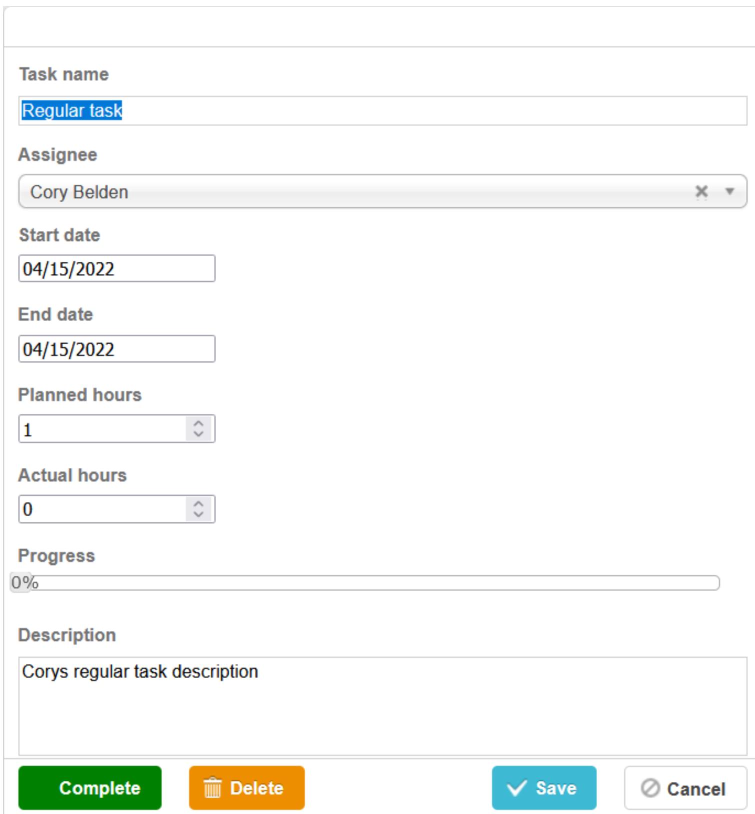
For Update task: Progress bar updates are reflected on the Gantt view. The task bar is shaded to the percentage specified in Edit Task, with a marker on the task to additionally show progress.

Task at 0% complete:

Task at 25% complete:

Drag the up arrow on the task to change the progress without opening the task

Task dialog box:



Exclamation Point for Outstanding Task Issues

The exclamation point on a task flags the following outstanding issues:

Notification not sent – a notification was created by a change made to the task, including task creation and date or assignee changes, but the Send Notifications button has not been clicked yet.

Task missing assignee – a task was created but no assignment was made

Task is past due – a task is past the assigned due date

Scheduling By Traffic/Project Managers

With CodySoft®'s project scheduling feature, you can save valuable time by reusing the tasks and schedules you create by exporting from a populated project and importing into your project(s) you want to use the same schedule. For each task you create, you assign staff, estimated hours, start and due dates, and dependencies. You can also edit and revise tasks to accommodate mid-stream changes in your project's workflow.

As the Traffic Manager (and/or Project Manager, depending on how your company assigns roles and responsibilities), you are responsible for creating project schedules and assigning tasks. In the project record, there are several ways to do this. Please note that schedules and tasks can only be added after the project's status is set to **Approved**. After the schedule has been added and the tasks have been assigned, and you change your project's status is changed to **In Progress**, the tasks that do not have dependencies will go In Process and those to whom you have assigned tasks will receive notification emails.

NOTE: When a project is cancelled or completed and archived, all tasks are removed from users' dashboards, and notifications of those tasks are cleared.

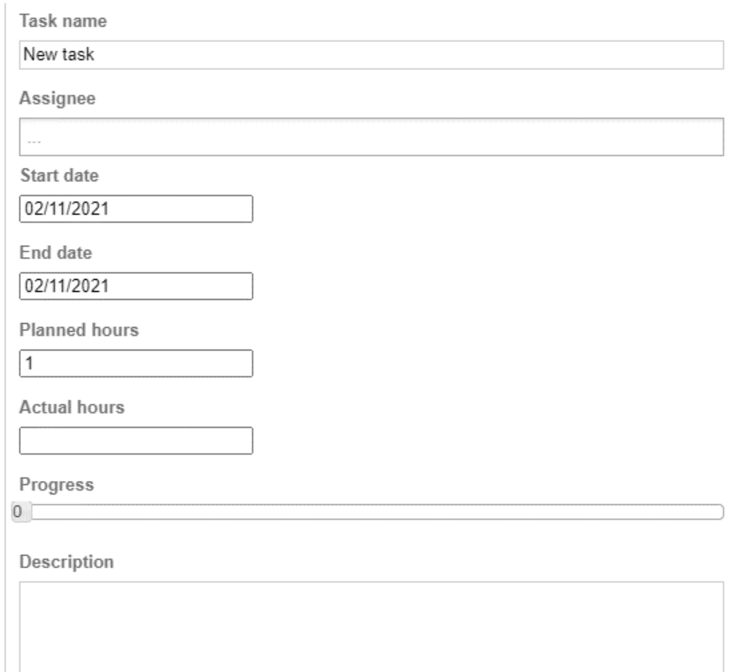
Schedule/task options on the project record's Task tab

1. **Add Task** – tasks are added individually to create a schedule or as additions to an existing schedule.
2. **Import Tasks** – use this option to add tasks previously saved as a CSV file with specific Start and Due dates. **Note:** if tasks already exist and you select this option, the existing tasks will be overwritten with the newly uploaded tasks.
3. **Export Tasks to File** – exports all tasks in the current project to a CSV file for future use. If the project you export from is blank, the system will export the blank task template, to then be populated.

Creating and assigning tasks using Add Task (Plus sign) (+)

1. In the **Project Record**, click the **Tasks** tab.

2. Click the **plus sign (+)** on the header row to create a new task. The New Task dialog box displays.



3. Enter the required fields in the Create Task dialog box.

    a. **Task Name** – Enter the name of the task. Be sure to use good naming conventions that identify the purpose of the task, and the round of review if you have multiple templates for which you are creating tasks for reviews (see *Reviews and Schedules*).
    b. **Assignee** – Select a person to whom to assign the task. If you select multiple assignees, individual tasks will be created for each assignee.
    c. **Start Date** – Enter the task's start date.
    d. **End Date** – Enter the task's due date.
    e. **Planned Hours** – Enter the estimated number of hours it will take to complete the task.
    f. **Actual Hours** – Leave blank for now. The Assignee will enter the actual hours worked when the task is marked as complete.
    g. **Progress** – Leave blank for now. The Assignee will use the slider bar to enter progress on the task while the task is being worked.
    h. **Description** – Enter the description of the task.

4. Click **Save** to save the task.

Exporting tasks for future use

1. In the **Project Record**, click the **Tasks** tab
2. On the **Tasks** tab, click the **Export Tasks to File** link. The tasks are exported to a .csv file.

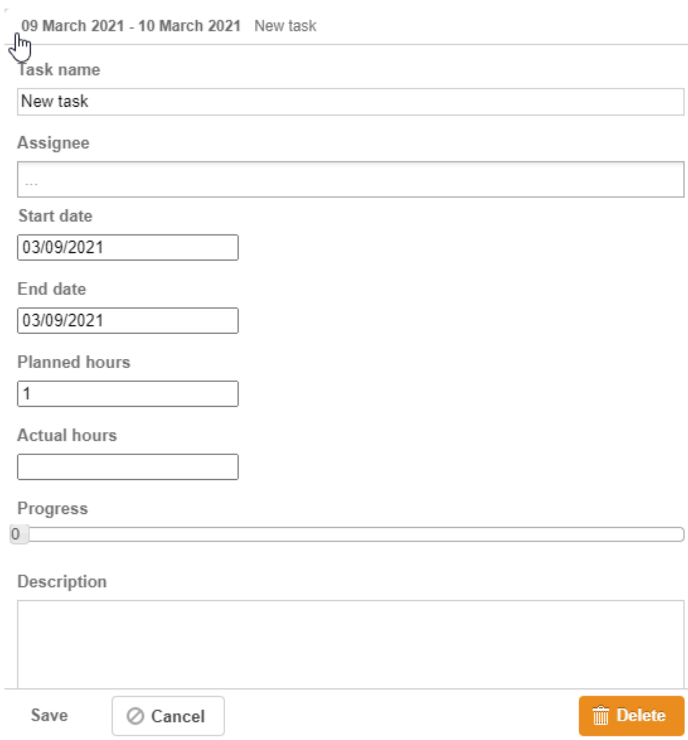
3. Select **Open with Excel** and click **OK**. Excel launches and shows your tasks in a spreadsheet format.
4. In the Excel file, click **Save As** to name your file and save it as a CSV file.

Importing saved tasks to a project record

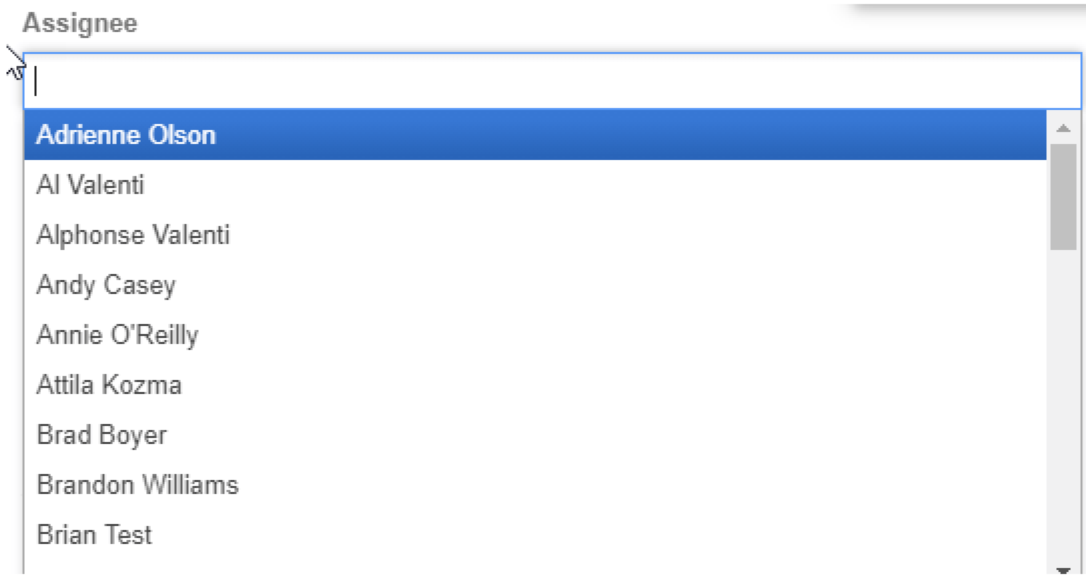
1. In the **Project Record**, click the **Tasks** tab
2. On the **Tasks** tab, click the **Import Tasks** link. The **Upload Tasks** box appears.
3. Click **Browse**.
4. Select a **CSV task file** you created earlier.
5. Click **Open**. The file name appears in the box.
6. Click **OK**. The task list appears in the **Tasks** tab.

Creating tasks

1. Click the **Tasks** tab.
2. Click the plus sign (+) on the column header row to create a new parent task. The New task dialog displays:



3. Enter a new task **Name**.
4. Click in the Assignee field to add **Assignees**. The list of available assignees displays:

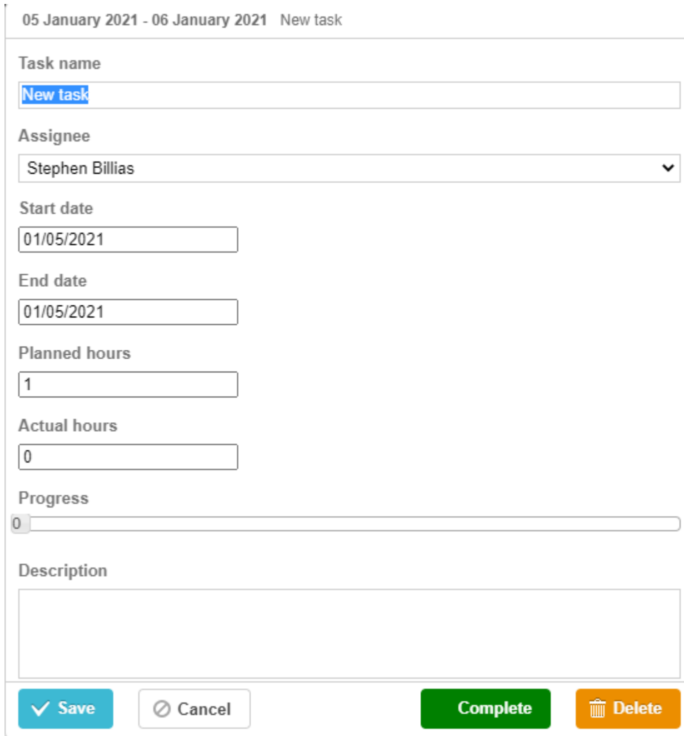


NOTE: Adding multiple assignees in the create task dialog creates a single task for each assignee.

5. Enter a task **Start date**. The field defaults to today's date.
6. Enter an **End date**.
7. Enter the **Planned hours** it will take to complete the task.
8. Leave the **Actual hours** and **Progress** fields blank, these are for the Assignee to fill in when completing the task.
9. Enter a **Description** of the task.
10. Click **Save** to save the task. The task is added to the Gantt chart in its place on the calendar.

Editing tasks

1. Click the **Tasks** tab.
2. Double click the **task** you want to edit. The Edit task dialog displays:

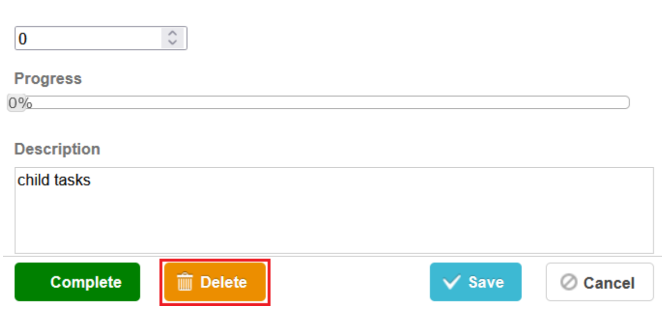


3. You can edit any of these task items:
    a. **Task Name**
    b. **Assignee**
    c. **Start Date**
    d. **End Date**
    e. **Planned Hours**
    f. **Actual hours**
    g. **Progress**
    h. **Description**
4. Click **Save** to save the changes to the task.

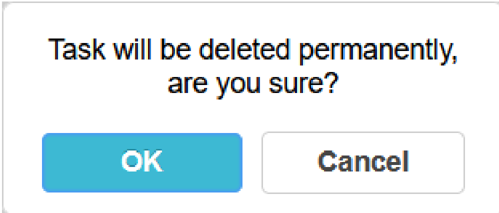
Deleting tasks

To delete a task:

If task has been created and committed but not started, you can delete the task. Double click on the task you wish to Delete, select Delete.



A warning message will display



Click OK to delete the task.

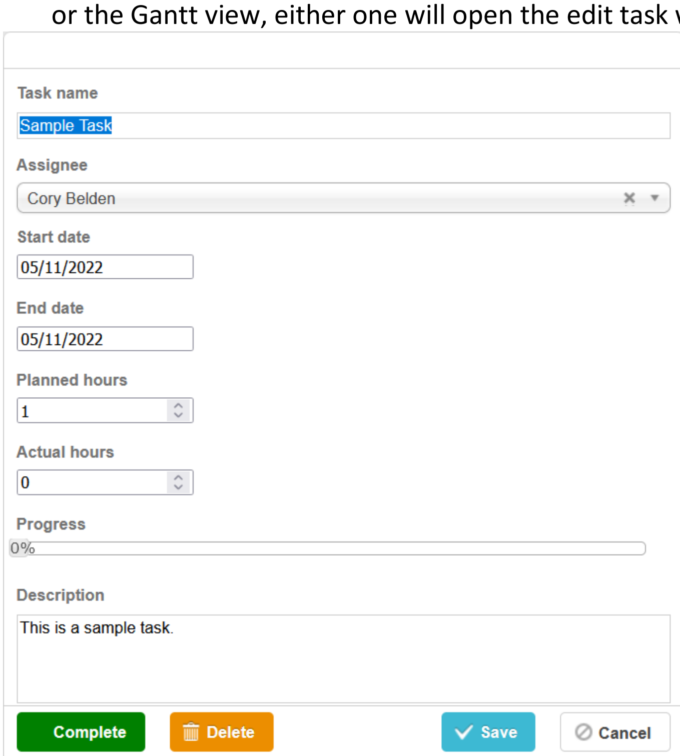
The task tab has project management rules for deleting tasks. You cannot delete the following tasks:

- Parent tasks, regardless of status.
- Tasks with dependencies
- Tasks with greater than 0% progress.
- Completed tasks

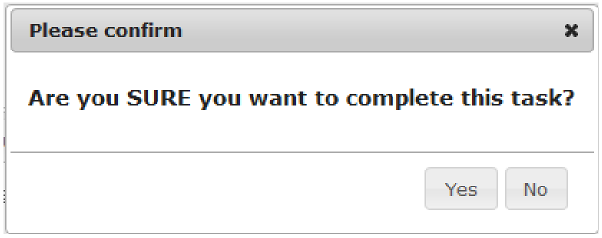
Completing tasks

To complete a task from within the project:

1. From the Tasks tab, double click the **task** you wish to Complete. You can click in the table or the Gantt view, either one will open the edit task window



2. Fill in Actual hours
3. Set Progress to 100%
4. Click **Complete**.
5. The "Are you sure" dialog box opens:



6. The screen will refresh and reflect the completion of the task.

To complete a task from the CM dashboard

1. From the **Tasks** section of your dashboard, locate the task you want to update as complete.
2. Select the task's **Complete Task** checkbox on the far right of the task row.
3. At the "Are you SURE you want to complete this task?" prompt, click **Yes**.
4. In the Set Actual Hours dialog box, enter the hours and minutes it took for task completion.
5. Click **OK**. A red checkmark in the checkbox indicates that the task is complete.

Completing 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.

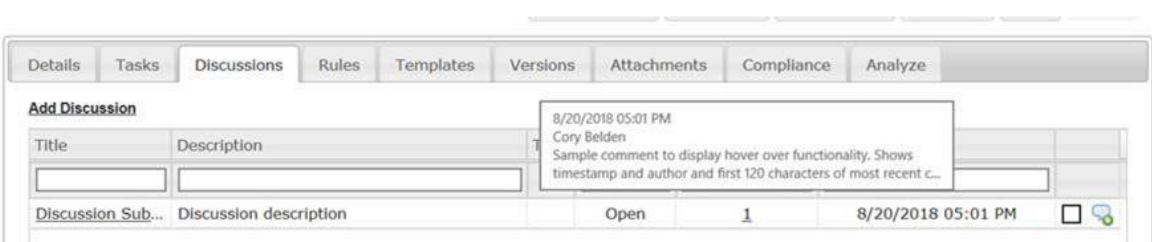
1. From the home page, choose the project you want to complete
2. Change the Status to **Complete**

The project is archived automatically.

Discussions

The **Discussions** tab is where you can communicate about your project request or project with your team. Discussions can be created for anything from requesting more information on a project request to discussing a layout's image requirements.

When a discussion has been created, an automated email is sent, notifying selected users of the discussion thread. Discussions work like message boards so you can see everyone's comments. The **Discussions** tab is accessible in both the project request and project record.



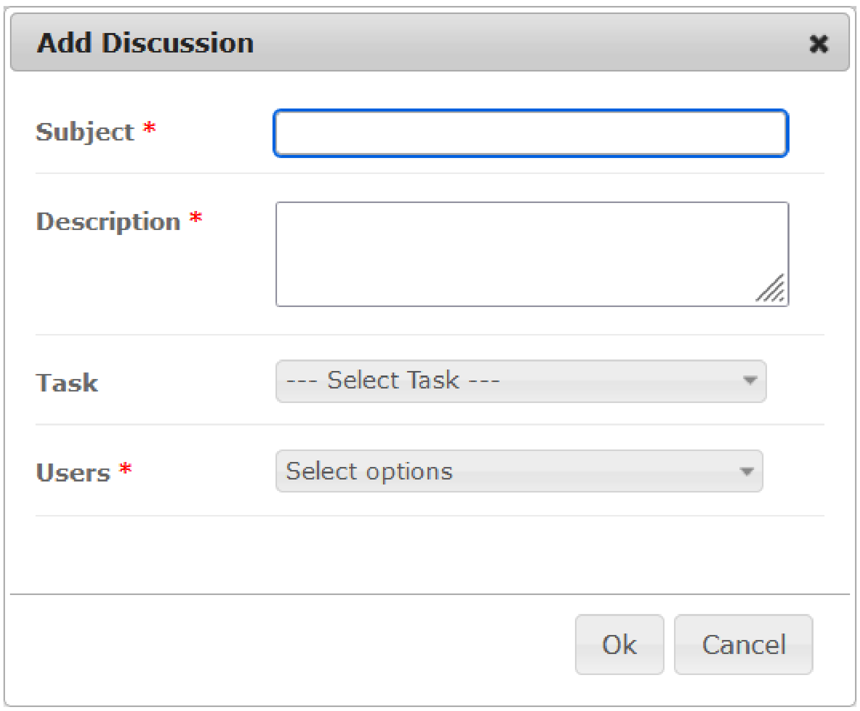
You can sort and filter on the Discussion columns. Hover over the number in the **# of Comments** column of any discussion to see the timestamp and the first few lines of the Comment. If the Description text is longer than can be displayed in the Description column, hover over the text to see the timestamp and the first few lines of the Description.

You can also see all your active discussions in your dashboard's **My Discussions** section.

Discussions may be linked to tasks also.

Adding a new Discussion

1. Click the **Discussions** tab.
2. Click the **Add Discussion** link. The Add Discussion dialog displays:

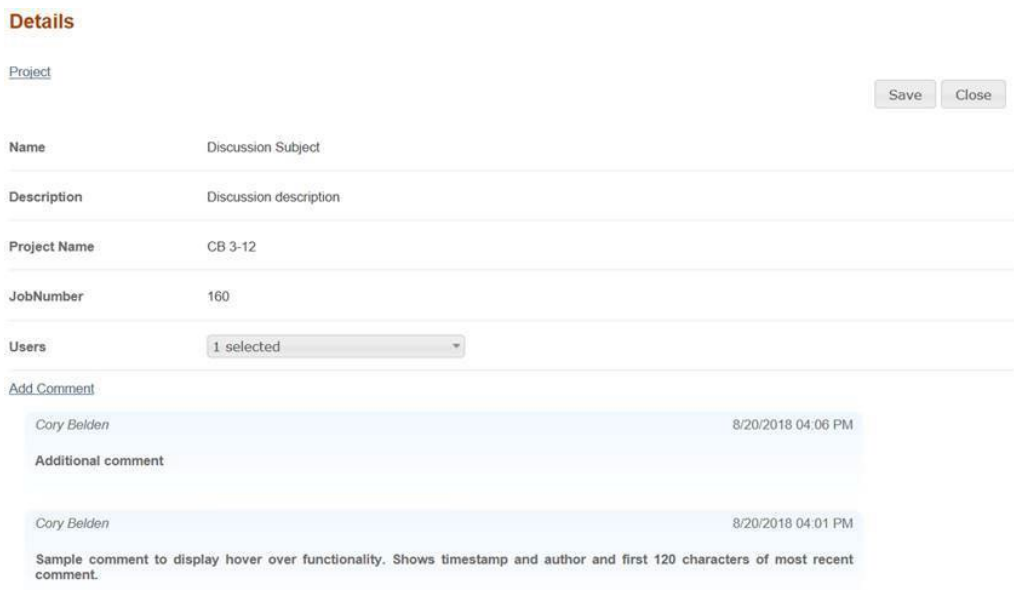


3. In the **Add Discussion** box, enter the **Subject** and **Discussion Description** for your discussion.

   NOTE: The subject and discussion description you add are included in the discussion's notification email. *Example* – Subject: "Copy"; Discussion Description: "When will copy be available?"
4. Optionally, select the Task associated with the discussion
5. Scroll down to select the **User(s)** to receive notification of your discussion from the dropdown list.
6. Click **OK**. Your new **Discussion** appears below the **Discussions** title bar.

Discussion Details

You can view the details of any discussion. Click the **Discussions** tab. The **Discussion Details** screen appears.



- User comments are sorted with the most recent comment at the top.
- You can add users to a discussion by selecting their names from the dropdown list.
- You can add a comment to a discussion from the Discussion Details screen. See *Adding a comment to a Discussion.*

Adding a comment to a Discussion

Use Comments to reply to Discussion items. You can have back and forth through Comments until the Discussion item is resolved and the discussion is closed.

1. Click the **Discussions** tab.
2. Click the appropriate **Discussion** (under the **Discussions** title bar).
3. The **Discussion's Details** screen appears.
4. Click the **Add Comment** link to add a comment. The Add Comment box appears.
5. Enter comments in the box and click **OK**. An email notification is sent to Comment recipients.

Closing a Discussion

1. Click the **Discussions** tab.
2. Click your discussion (under the **Discussions** title bar). The **Discussion's Details** screen appears.
3. Click **Close Discussion** (on the right side of the screen). The **Add Final Comment** box appears.
4. Enter comments in the box and click **OK**.

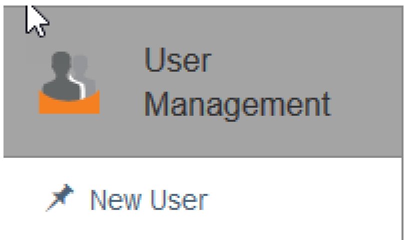
You and staff associated with this project will receive a confirmation email.

System Administration

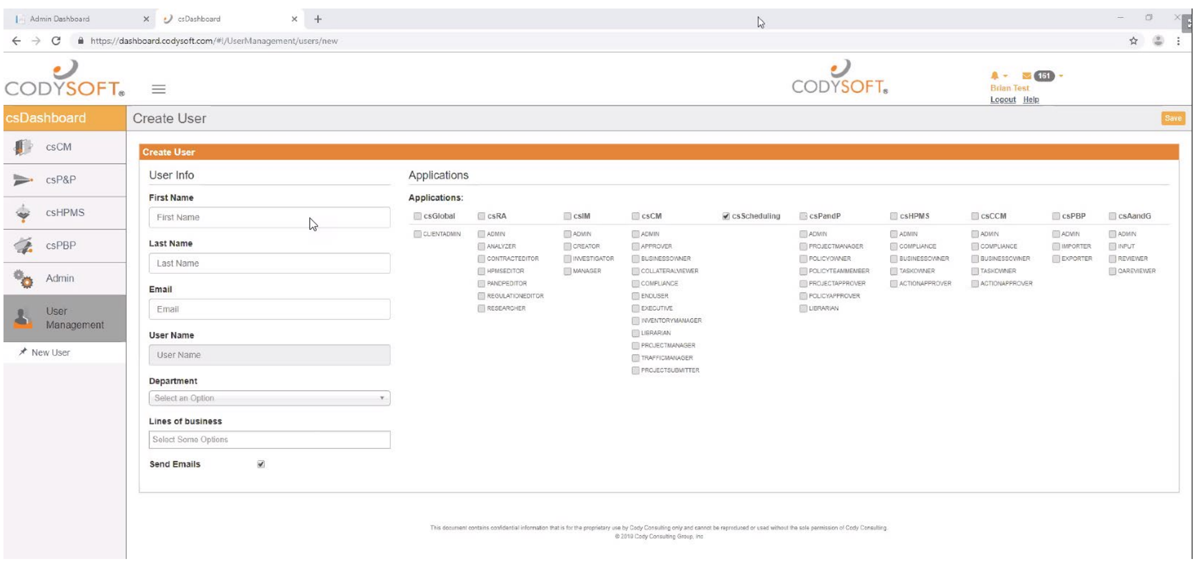
CodySoft® allows the individual assigned as the System Administrator the ability to add new users and assign and edit user permission profiles.

Adding users and assigning permission levels

1. From the main dashboard of CodySoft®, click **User Management**.
2. Click **New User**



The **Create User** dialog box opens.



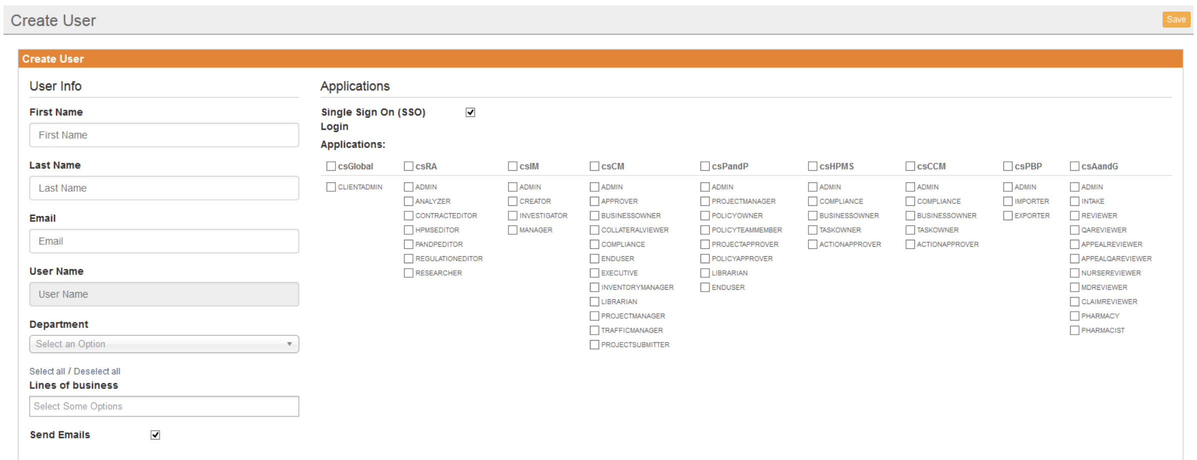
3. In the **User Info** section, enter information about the new user in the following fields:
    a. **First Name**
    b. **Last Name**
    c. **Email**–Add user's complete email address, including @ information
    d. **User Name**–This field is auto-filled with the user's email address as the name
    e. **Department**–Select the user's department from the drop-down list
    f. **Lines of Business**–Select one or more choices from the available lines of business
    g. **Send Emails**–Select this checkbox if the user should receive email notifications from CodySoft®
4. In the **Applications** section, select the checkboxes for the user roles to which the user is assigned, for each available licensed CodySoft® application. In addition to Collateral Management (CM) your company may have licensed other CodySoft® applications. Check

with your CodySoft® system administrator counterpart if you are unsure which roles to assign to a user for which applications.

5. Click **Save**. The new user is added to the list of users.

Add a Single Sign On User

Some companies have Single Sign On (SSO) where users have one username and password for multiple applications. If your company uses SSO, an additional checkbox appears on the Create User screen:



Select the Single Sign On (SSO) checkbox to activate SSO for the new user.

Deactivate a User

To deactivate an existing user:

1. Select **User Management** from the main csDashboard
2. Find the **user name** in the list, or to search, enter a **user name** in the Enter User Name field
3. Click **Search**
4. Click the **user name** to select the user
5. Click **Disable** in the upper right of the Edit User screen. The user remains in the user list with the checkbox deselected in the **Is Active** column

NOTE: You can reactivate the user by following the same steps and then clicking **Enable**

User Roles

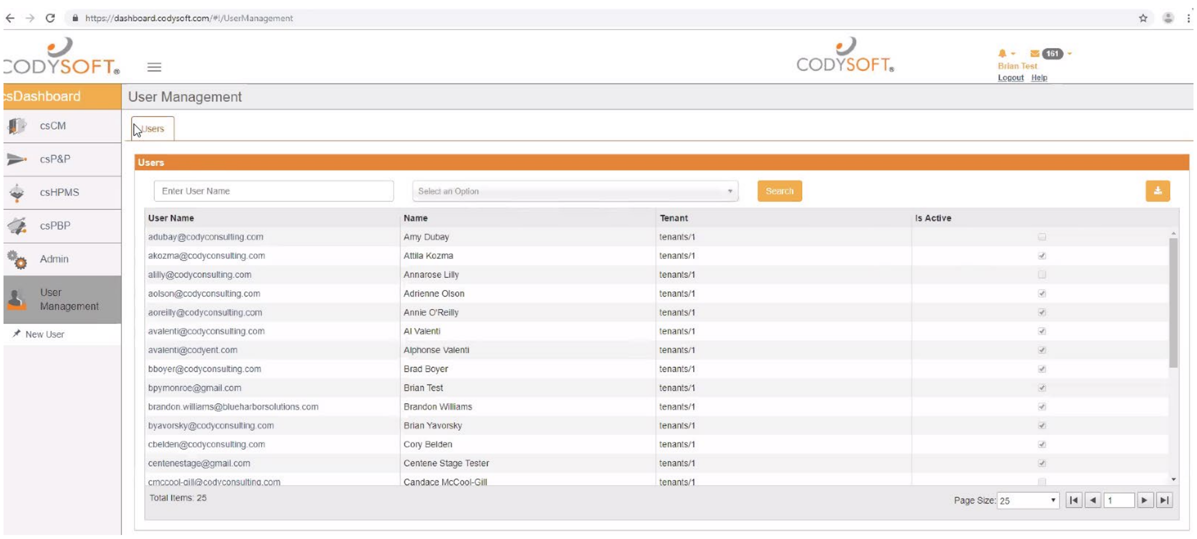
The following table describes the user roles in CodySoft's Collateral Management module. Check with your CodySoft® system administrator if you are unsure which roles to assign to a user in this module.

User Role	Description
Admin	The admin has client administrative rights. This user can set client-specific values for the configurable fields within the module.
All Permissions	This user has all permissions except admin rights. These permissions include compliance permissions. This is the most broad-based permission group available.
Traffic Manager	This user receives draft project requests as they are submitted. They can approve project requests and to assign project managers to the projects they have approved.
Project Manager	This user can assign tasks and approvals, approve templates and create versions of documents in the projects that they are assigned to. This person is responsible for the day-to-day management of collateral projects within the Collateral Management Module.
Document Developer* *NOTE—this role is assigned at the Project level on the Project Details tab, not as a global user role	This user will have access to the dashboard and can be assigned tasks within individual projects. They can edit documents in the Template editor, and get approvals, do template testing, create reviews and edit, download versions from the Versions tab, and can view, create and edit assets within the library. They can create rules within a template only, assign rules to projects, and edit their own rules but not other user's rules.
End User	This user will have access to the dashboard and to Projects, Discussions, Tasks, Submissions and Approvals tabs. They can be assigned tasks within individual projects. They can create projects so that they can assign project managers, and read template documents. They cannot create reviews, cancel templates, add templates, edit templates, or view revision history. and view assets within the library. They can download versions read only from the Versions tab and see and add attachments.
Compliance	This user can create and update compliance submission records.
Collateral Viewer	This user can view approved materials in the library.
Business Owner	A user with this permission will appear on the list of business owners in the project record. No additional permissions are associated with this profile. Usually, this user will have additional permission sets associated with his or her profile.
Approver	A user with the permission will appear to the project manager as a user who can be assigned to the template approval process. Usually, this user will have additional permission sets associated with his or her profile.

User Role	Description
Executive	Reporting rights. For users for whom you would like to be able to access reports, this permission set will be applied.
Inventory Manager	This user can upload and manage inventory reports.
Librarian	This user will have full access to view, create and edit all library items, including the CM data tool. This user will most likely have additional permission sets associated with his or her profile.

Downloading the user list

From the **User Management** tab, you can download a list of users to an Excel spreadsheet for reporting purposes, for example to review users' roles and permissions. This download provides the ability to analyze users' configurations in spreadsheet form.



1. First, optionally filter the list by user name
2. Next, optionally filter the list by electing a user role from the dropdown list. You can filter by both fields in combination, for example, to see all users with gmail in their user name in a specific user role.
3. Click **Search**. The user list is filtered by your choices.
4. Click the download button . The filtered or unfiltered list is provided as an Microsoft Excel Comma Separated Values (.csv) file. You can open or save the file.

User Groups

Cody will work with you to establish user groups based on your needs. Please contact your system administrator to help create user groups.

Admin dashboard

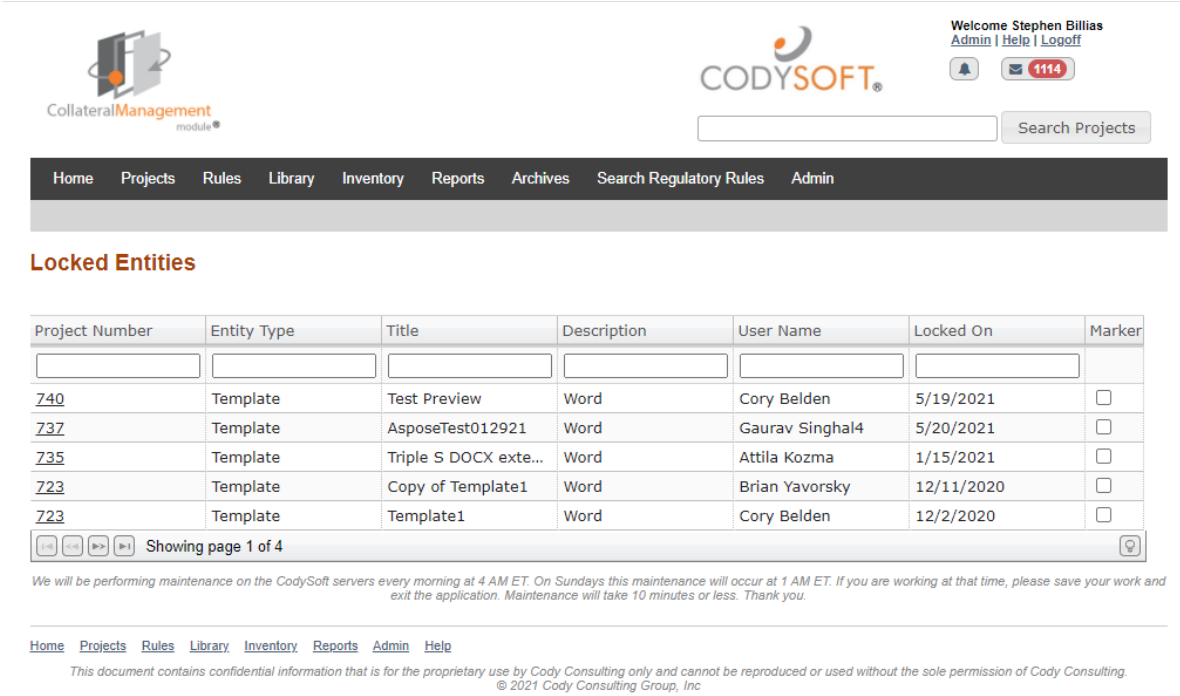
The System Administrators can also add content to the following fields on the **Admin** dashboard by clicking any section tab:

1. Lines of Business
2. Departments
3. Media Types
4. Audiences
5. Cost Centers
6. Plan Types

Unlock Entities

As project manager, you can unlock items like templates that have been unintentionally left locked by users, for others to access them.

1. From the Admin tab click **Unlock Entities**. The Locked Entities screen displays:



2. Select the checkboxes in the Marker column for the items you want to unlock
3. Click **Unlock Selected**. The items are unlocked and removed from the list

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**.

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.

Notifications Table

The system sends notifications when there are changes to status or other changes about which an owner needs to be notified. Here is a chart that details when and to whom notifications are sent. Blue color and underlining indicate a linked field:

Notification Condition	Notification/Email subject line	Notification/Email text
When a project is assigned, notify Project Manager	[Project #], [Project Name] was assigned to you	You have been assigned as the Project Manager for this project. Project #, Project Name, Tenant #, Link to Project
When a task is assigned	You may begin [Task #] [Task Name] for [Project #] [Project Name]	The following task has been assigned to you (see below) and you may begin now. Project #, Project Name, Tenant #, Task Name, Description, Start Date, Due Date, Link to Project
When a task is put on hold	[Task Name] for [Project #] [Project Name] has been put on hold	The task you have been assigned is now on hold. A previously completed parent task has been reopened. Please contact your Project manager if you have any questions. Project #, Project Name, Tenant #, Task Name, Description, Link to Project
When a task has been completed.	Completed: [Task Number] [Task Name] for [Project #] [Project Name]	The following task has been completed for this project: Project #, Project Name, Tenant #, Task Name, Task Assignee, Description, Link to Document.
When a task start date is changed	Start Date Change - Task Number] [Task Name] [Project #], [Project Name]	The following task has been changed for this project: Project #, Project Name, Tenant #, Task Name, Description, Link to Project

Notification Condition	Notification/Email subject line	Notification/Email text
When a task due date is changed	The Due Date for [Task Number] [Task Name] [Project #], [Project Name] has changed	The following task has been changed for this project: Project #, Project Name, Tenant #, Task Name, Description, New Start Date, Link to Project
When a user is assigned as an Asset Approver	You've been assigned as an Asset Approver for [Asset Name]	Tenant #, Asset Name, Link to Asset. Please review this Asset and mark it as either approved or declined. If you mark it declined, you will be required to create a discussion to explain why you have declined the Asset
When a template or asset has been approved by all approvers	You can mark Template/Asset [Template Name]/ [Asset Name] as approved	All Approvers have approved the Template/Asset. You can now mark it as approved. Template/Asset Details, Tenant #, Template/Asset Name, Link to Template/Asset
When an asset approval is received	Asset [Asset Name] Approval received	Your Asset has been Approved. Asset Details, Tenant #, Asset Name, Link to Asset
When an asset is declined	Asset [Asset Name] Declined	Your Asset has been Declined. Tenant #, Asset Name, Approver, Link to Asset
When an asset is updated	The [Asset Name] has been updated	Tenant #, Project #, Project Name, Link to Project
When a new discussion is added	New Discussion: [Project #] - [Project Name]	A discussion has been created for project. Project #, Project Name, Tenant #, Link to Project, Title of discussion, Description, Creator
When a comment is added to a discussion	Comment has been added to a discussion [Project #] - [Project Name]	A comment by [Commenter Name] has been added to the following discussion for project. Project #, Project Name, Tenant #, Link to Project, Title of discussion, Description, Comment
When a discussion is closed	Project Discussion closed: [Project #] - [Project Name]	The following discussion has been closed by [Project Manager] Project #, Project Name, Tenant #, Link to Project, Title of discussion, Description, Final Comment
When an approver is assigned to review a template	You've been assigned as a Template Approver for [Template Name] in [Project #] [Project Name]	You've been assigned as a [Template Name] Approver for [Template Name]. Project #, Project Name, Tenant #, Template #, Link to Template

Notification Condition	Notification/Email subject line	Notification/Email text
When template approval is received	[Project #] {[Project Name] [Template Name] Approval Received	Your Template has been Approved. Project #, Project Name, Tenant #, Template Name, Approver, Link to Template
When a template review is completed	Template Review Completed for [Project #] [Project Name] [Task Assignee]	The following review [Template Name] has been completed for Template: Project #, Project Name, Tenant #, Template Name, Task Assignee, Date Finished, Link to Template
When a template is declined	[Project #] [Project Name] Declined	Your Template has been Declined. Project #, Project Name, Link to Discussion, Tenant #, Template Name, Approver, Link to Template t
When a project manager is assigned to a project	[Project Manager] assigned to [Project #] [Project Name]	The project manager for your project is: [Project Manager]. Project #, Project Name, Tenant #, Link to Project,
When Project is approved, notify Project Manager	[Project #] [Project Name] is Approved	Your project request has been reviewed and approved by [Approver Name]. You may begin work on the project. If your project details require a change, please contact [Approver Name]. Project #, Project Name, Tenant #, Link to Project.
When a project completion date changes	Project Completion Date has changed: [Project #] – [Project Name]	The completion date for your project has been changed. Revised completion date: [Date]. Project #, Project Name, Tenant #, Link to Project.
When a project is completed or canceled and moved to Archive	[Project # [Project Name] has been Archived	Project was moved to Archive. Project #, Project Name, Tenant #, Requested by

Notification Condition	Notification/Email subject line	Notification/Email text
When new versions are created	Version Creation Summary [Project #] [Project Name]	The following versions were created for this project: Project #, Project Name, Template #/Name, Tenant #, Link to versions
When version creation fails on some plans	Version Creation Summary [Project #] [Project Name]	The following versions were created for this project: Project #, Project Name, Template #/Name, Tenant #, Link to versions Failed to Create Versions Plan #: Failed Reason: Plan #: Failed Reason:

Compliance

The **Compliance** feature helps you track compliance and regulatory approvals for your documents. For each approved version in a project record, you can define the **Compliance Type** you need to track (internal, legal, CMS, Medicaid, DOI, etc.), its **Submission Type** (5-day, 45-day, etc.) and its **Disposition Type** (file-and-use, CMS approved, deemed, etc.). You can track multiple compliance types for each approved version.

Information for Compliance Staff

Overview of Compliance dashboard

As compliance staff, when you log onto CodySoft®, you will see the following sections on your dashboard. (See *Dashboard* for more information on navigation and personalization.)

1. **My Project Requests** – This is where to find a list of project requests you've submitted.
2. **My Projects** – This is a list of projects in which tasks have been assigned to you.
3. **My Tasks** – This is a list of all pending tasks assigned to you.

4. **My Discussions** – This is a list of discussions in which you are a participant.
5. **My Submissions** – This is a list of the submissions you've created.
6. **All Submissions** – This is a list of ALL submissions.

In the project record, you can create compliance entries for every approved version of a document. For example, if Document A requires approval from your legal department before it can be submitted to the appropriate state's regulatory agency, you create a compliance entry for your legal department's review. Once the legal approval is received, you then change the status of its compliance entry disposition to Approved and add its approval date, the Disposition Date. Next, you create a second compliance entry for the same version of the document. This time, however, the **Compliance Type** is for the state regulatory agency and the **Submission Type** for the state, for example 30-day. After approval is received, you change the status of the disposition from Pending to Approved and add its approval date, the Disposition Date.

Create a compliance entry for a version

1. A compliance entry is created from an approved version. (See *Approving a template*).
2. On the **Versions** tab, click **Create Compliance** icon . The **Add Version Compliance** box appears.
3. Enter the following information:
   a. **Compliance** – Select the compliance type from the drop-down list.
   b. **Submission Type** – Select the submission type from the drop-down list.
   c. **Submission Date** – Select the submission date on the calendar widget.
   d. Click **OK**.
4. The **Version Compliance** window appears. Click **OK**.
5. Click the **Compliance** tab to see your compliance entry.

Changing the status of a compliance entry's disposition

1. From the **My Submissions** section of your dashboard, click the project or job number of the piece you want to update. The **Compliance** tab appears.
2. On the **Compliance** tab, click the version name of the compliance entry you want to edit. The **Edit Compliance** box appears.
3. Select the **Disposition Date** on the calendar widget.
4. Select the **Disposition** from the drop-down list.
5. Click **OK**.

Remember to check and update your **My Submissions** items on a regular basis so that others see their project's approval statuses.

Regulatory Analyzer®

The CodySoft® Regulatory Analyzer® contains client-approved CMS marketing guideline rules that are used to research regulations and to verify template content is compliant. The Regulatory Analyzer® can also be customized to include rules of other regulatory agencies and any company-specific business rules.

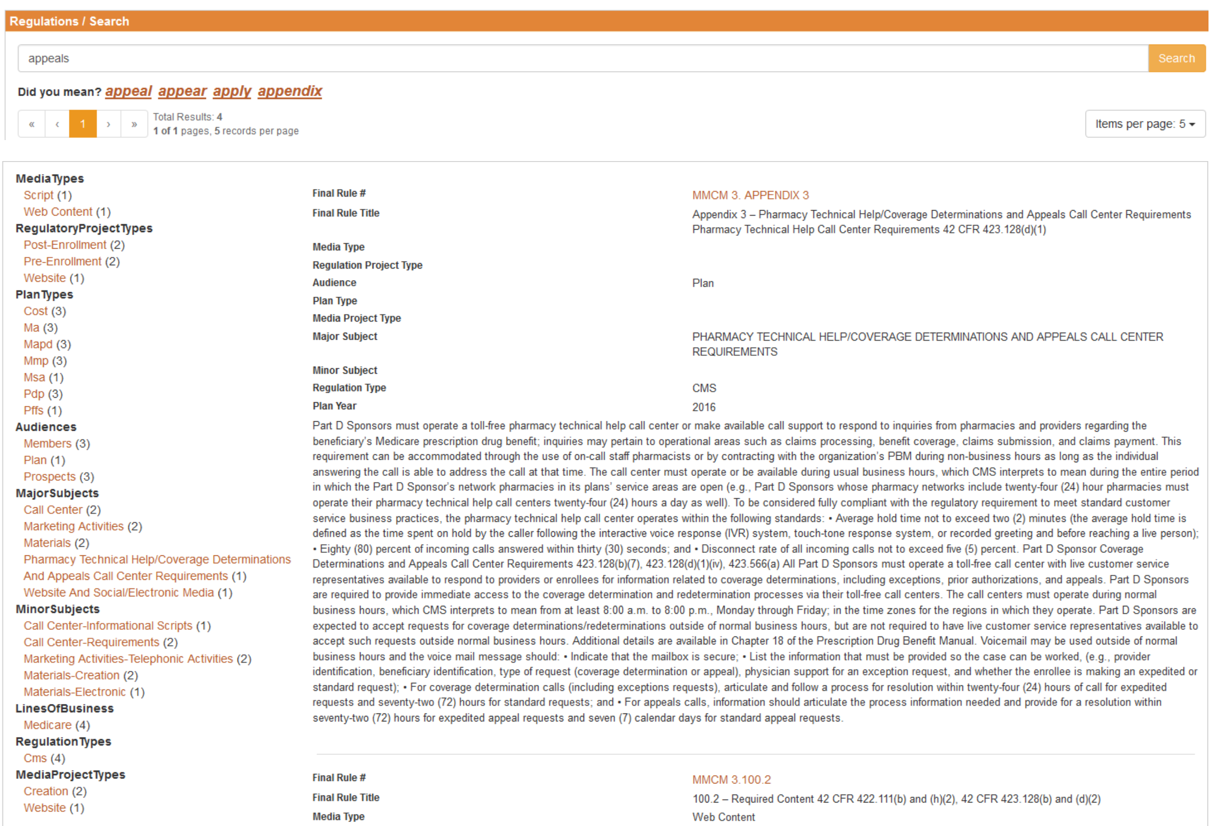
Search Regulatory Rules

From within the Collateral Management Module, you can search for regulations relevant to your project.

1. From the main menu, select **Search Regulatory Rules**. The Regulatory Analyzer® search dialog box opens.

2. In the Search bar, enter a word or phrase and click **Search**.

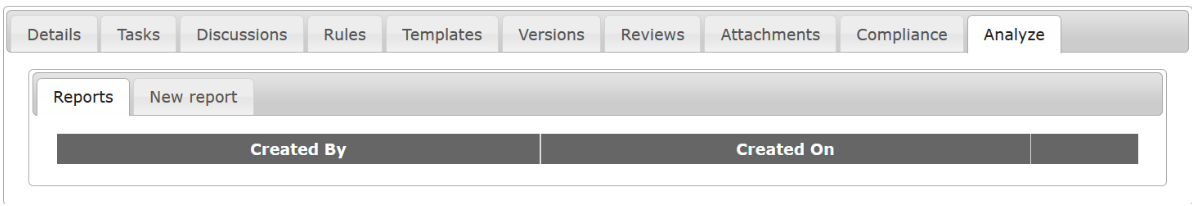
   Regulatory Analyzer® returns a list of relevant responses. For example, a search of the word "appeals" returns this set of results:



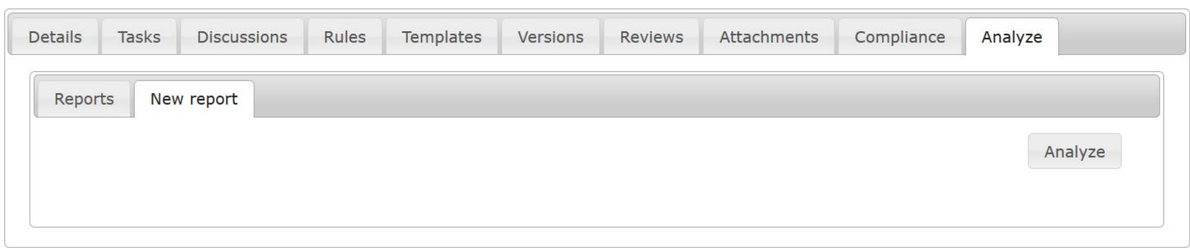
   The search results identify categories where results are found. Click any of these links to see the specific result for that category. For example, if you clicked Script from the category Media Type above, you would see the single search result for the Media Type/Script category.

Analyze

From within a project, you can perform an analysis that returns a list of relevant documents in the Regulatory Analyzer® database, including CMS guidelines, rules of other regulatory agencies, and company-issued documents, based on criteria you specify.

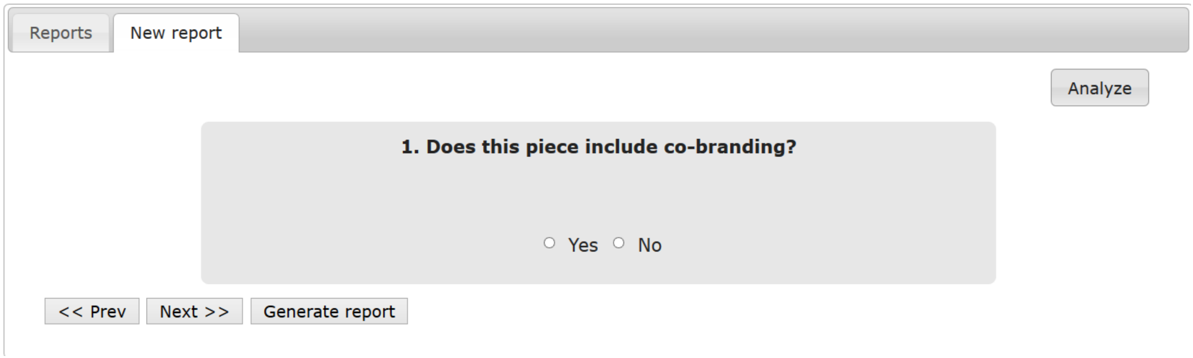


1. From a project’s menu click **Analyze**
2. Click **New Report**
3. Click **Analyze**



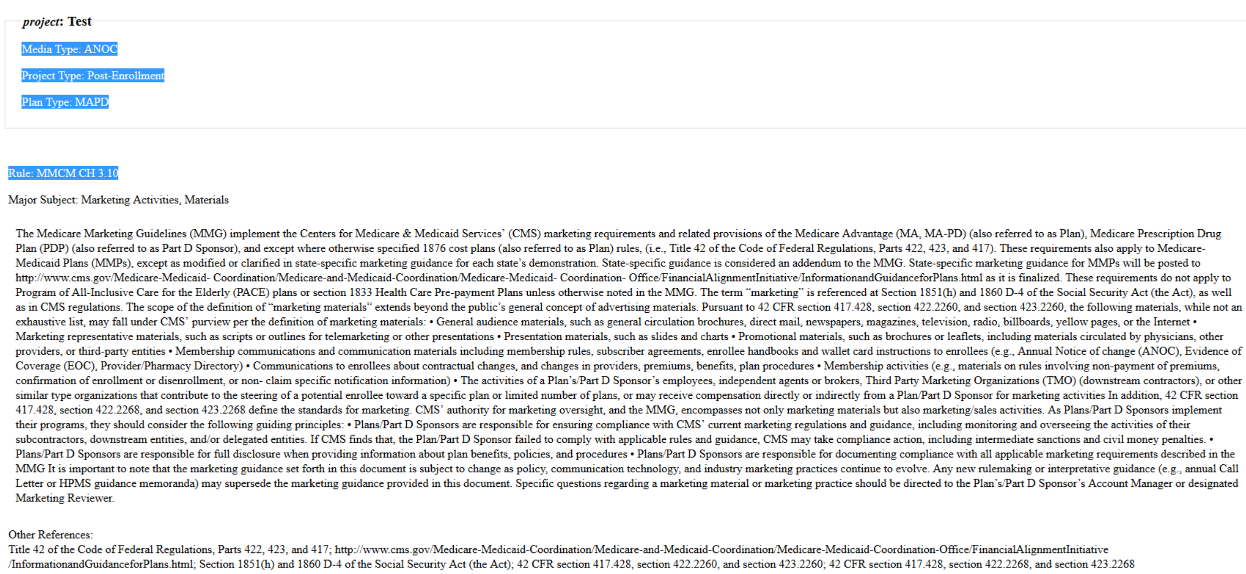
4. In the Set Regulatory Project Type dialog box, select the **regulatory project type** you want to search

5. Click **OK**
6. Depending on query results, the program may or may not ask questions associated with the project type. For example:



7. When you have answered all questions (if any) click **Generate report**

The Regulatory Analyzer® generates a report with a listing of all rules that meet the criteria you specify, with their major subjects and other references listed also.


***project*: Test**

Media Type: ANOC

Project Type: Post-Enrollment

Plan Type: MAPD

Rule: MMCM CH 3.10

Major Subject: Marketing Activities, Materials

The Medicare Marketing Guidelines (MMG) implement the Centers for Medicare & Medicaid Services' (CMS) marketing requirements and related provisions of the Medicare Advantage (MA, MA-PD) (also referred to as Plan), Medicare Prescription Drug Plan (PDP) (also referred to as Part D Sponsor), and except where otherwise specified 1876 cost plans (also referred to as Plan) rules, (i.e., Title 42 of the Code of Federal Regulations, Parts 422, 423, and 417). These requirements also apply to Medicare-Medicaid Plans (MMPs), except as modified or clarified in state-specific marketing guidance for each state's demonstration. State-specific guidance is considered an addendum to the MMG. State-specific marketing guidance for MMPs will be posted to http://www.cms.gov/Medicare-Medicaid- Coordination/Medicare-and-Medicaid-Coordination/Medicare-Medicaid- Coordination- Office/FinancialAlignmentInitiative/InformationandGuidanceforPlans.html as it is finalized. These requirements do not apply to Program of All-Inclusive Care for the Elderly (PACE) plans or section 1833 Health Care Pre-payment Plans unless otherwise noted in the MMG. The term "marketing" is referenced at Section 1851(h) and 1860 D-4 of the Social Security Act (the Act), as well as in CMS regulations. The scope of the definition of "marketing materials" extends beyond the public's general concept of advertising materials. Pursuant to 42 CFR section 417.428, section 422.2260, and section 423.2260, the following materials, while not an exhaustive list, may fall under CMS' purview per the definition of marketing materials: • General audience materials, such as general circulation brochures, direct mail, newspapers, magazines, television, radio, billboards, yellow pages, or the Internet • Marketing representative materials, such as scripts or outlines for telemarketing or other presentations • Presentation materials, such as slides and charts • Promotional materials, such as brochures or leaflets, including materials circulated by physicians, other providers, or third-party entities • Membership communications and communication materials including membership rules, subscriber agreements, enrollee handbooks and wallet card instructions to enrollees (e.g., Annual Notice of change (ANOC), Evidence of Coverage (EOC), Provider/Pharmacy Directory) • Communications to enrollees about contractual changes, and changes in providers, premiums, benefits, plan procedures • Membership activities (e.g., materials on rules involving non-payment of premiums, confirmation of enrollment or disenrollment, or non- claim specific notification information) • The activities of a Plan's/Part D Sponsor's employees, independent agents or brokers, Third Party Marketing Organizations (TMO) (downstream contractors), or other similar type organizations that contribute to the steering of a potential enrollee toward a specific plan or limited number of plans, or may receive compensation directly or indirectly from a Plan/Part D Sponsor for marketing activities In addition, 42 CFR section 417.428, section 422.2268, and section 423.2268 define the standards for marketing. CMS' authority for marketing oversight, and the MMG, encompasses not only marketing materials but also marketing/sales activities. As Plans/Part D Sponsors implement their programs, they should consider the following guiding principles: • Plans/Part D Sponsors are responsible for ensuring compliance with CMS' current marketing regulations and guidance, including monitoring and overseeing the activities of their subcontractors, downstream entities, and/or delegated entities. If CMS finds that, the Plan/Part D Sponsor failed to comply with applicable rules and guidance, CMS may take compliance action, including intermediate sanctions and civil money penalties. • Plans/Part D Sponsors are responsible for full disclosure when providing information about plan benefits, policies, and procedures • Plans/Part D Sponsors are responsible for documenting compliance with all applicable marketing requirements described in the MMG It is important to note that the marketing guidance set forth in this document is subject to change as policy, communication technology, and industry marketing practices continue to evolve. Any new rulemaking or interpretative guidance (e.g., annual Call Letter or HPMS guidance memoranda) may supersede the marketing guidance provided in this document. Specific questions regarding a marketing material or marketing practice should be directed to the Plan's/Part D Sponsor's Account Manager or designated Marketing Reviewer.

Other References:
Title 42 of the Code of Federal Regulations, Parts 422, 423, and 417; http://www.cms.gov/Medicare-Medicaid-Coordination/Medicare-and-Medicaid-Coordination/Medicare-Medicaid-Coordination-Office/FinancialAlignmentInitiative/InformationandGuidanceforPlans.html; Section 1851(h) and 1860 D-4 of the Social Security Act (the Act); 42 CFR section 417.428, section 422.2260, and section 423.2260; 42 CFR section 417.428, section 422.2268, and section 423.2268

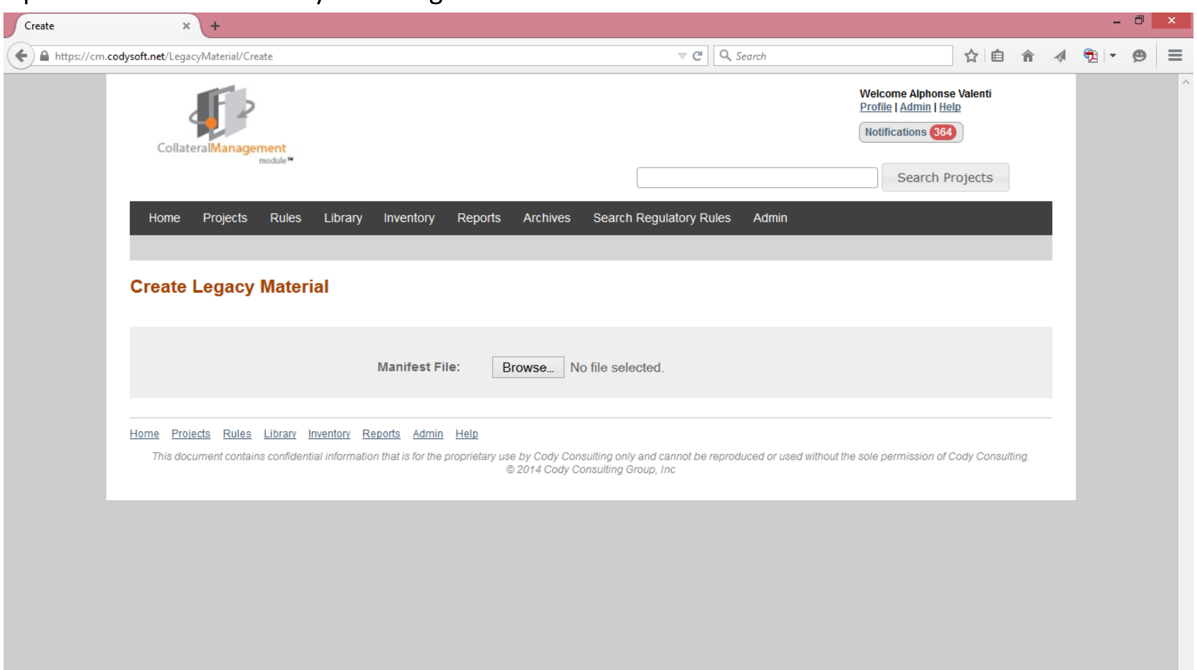
Library

The **Library** is where you upload, store and manage **Assets** for use in projects.

Legacy Library

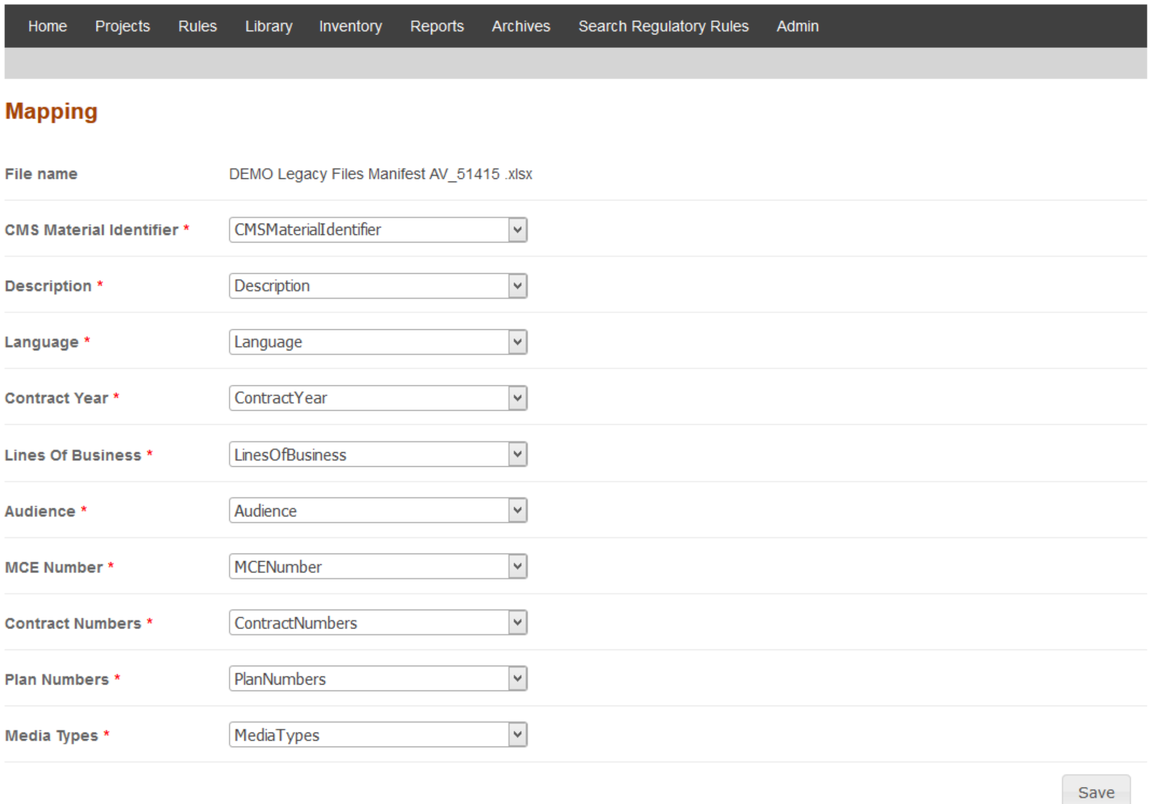
Uploading legacy materials:

1. Complete the CodySoft® “Legacy Materials Manifest” file that your CodySoft® implementation manager provided to you. **Note:** the format of this excel document must not change, and you must format the information in it in the same way that the sample information is formatted.
2. From the dashboard, select **Library**.
3. From the Library choices, click **Create Legacy**.
4. Upload the manifest file by browsing to its location.



NOTE: the manifest file must be an Excel spreadsheet.

5. Complete the Mapping of information on the manifest and click **Save**:



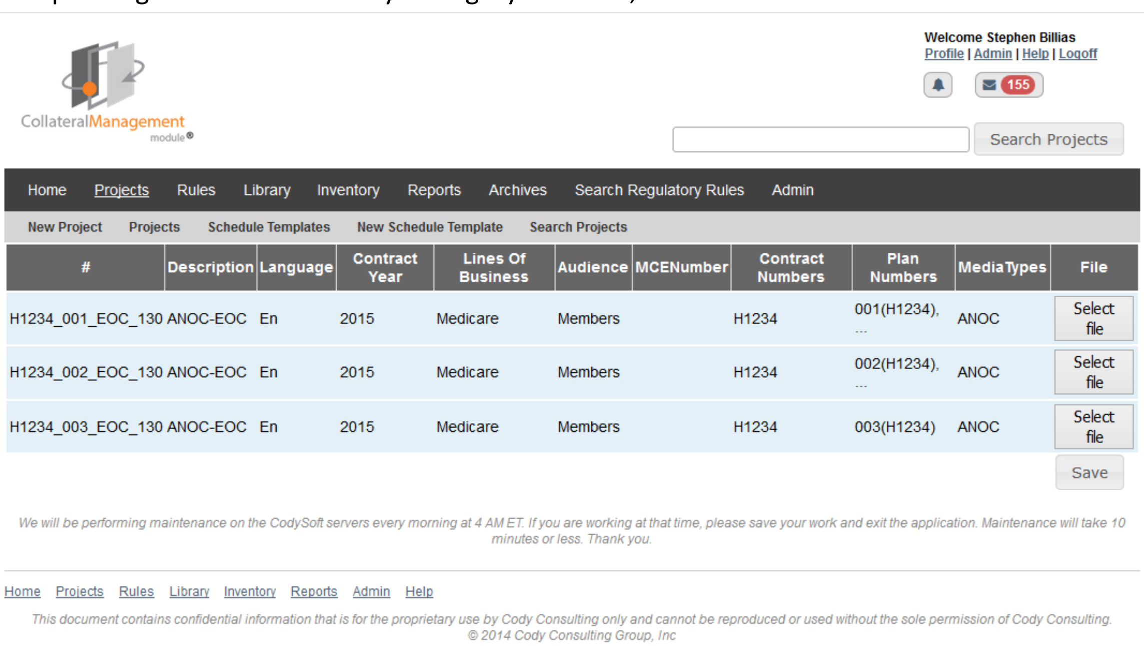
Home | Projects | Rules | Library | Inventory | Reports | Archives | Search Regulatory Rules | Admin

Mapping

File name	DEMO Legacy Files Manifest AV_51415 .xlsx
CMS Material Identifier *	CMSMaterialIdentifier
Description *	Description
Language *	Language
Contract Year *	ContractYear
Lines Of Business *	LinesOfBusiness
Audience *	Audience
MCE Number *	MCENumber
Contract Numbers *	ContractNumbers
Plan Numbers *	PlanNumbers
Media Types *	MediaTypes

Save

6. After the spreadsheet is uploaded and the manifest mapped, select the corresponding file for each line in your legacy manifest, and click **Save**:



CollateralManagement module®

Welcome Stephen Billias
Profile | Admin | Help | Logoff

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Search Projects

Home | Projects | Rules | Library | Inventory | Reports | Archives | Search Regulatory Rules | Admin

New Project | Projects | Schedule Templates | New Schedule Template | Search Projects

#	Description	Language	Contract Year	Lines Of Business	Audience	MCENumber	Contract Numbers	Plan Numbers	MediaTypes	File
H1234_001_EOC_130	ANOC-EOC	En	2015	Medicare	Members		H1234	001(H1234), ...	ANOC	Select file
H1234_002_EOC_130	ANOC-EOC	En	2015	Medicare	Members		H1234	002(H1234), ...	ANOC	Select file
H1234_003_EOC_130	ANOC-EOC	En	2015	Medicare	Members		H1234	003(H1234)	ANOC	Select file

Save

We will be performing maintenance on the CodySoft servers every morning at 4 AM ET. If you are working at that time, please save your work and exit the application. Maintenance will take 10 minutes or less. Thank you.

Home | Projects | Rules | Library | Inventory | Reports | Admin | Help

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NOTE: You must select a file for each line in the manifest before saving.

Inventory

CodySoft®'s inventory management tool organizes reports from your various vendors into a common platform, so you can see the current inventory on all your materials, where they're being stored, their reorder levels and usage information – all in one convenient location. With this tool, inventory information from all your chosen vendors is consolidated into one report. The tool also lets you create reorder alerts so you can stay ahead during peak times.

Accessing your current inventory records

1. From the dashboard, click **Inventory.**
2. Your current consolidated vendor inventory report displays, including the following information:
    a. **Vendor** – This is the vendor's name.
    b. **SKU** – This is the stock-keeping unit, or item number, used to identify each individual piece in inventory. This is also the version name.
    c. **On Hand** – This is the quantity in inventory.
    d. **Usage** – This is the amount of stock removed from inventory.
    e. **As of Date** – This date reflects the amount of stock on hand and used as of the date the information was tallied.
    f. **Added On** – This reflects the date the vendor's information was uploaded.

Overview of inventory menu

1. **View Inventory Records** – This is the same view as when you click **Inventory**. It shows your current consolidated vendors inventory report of all the reports you have uploaded into CodySoft®.
2. **Upload Inventory Records** – This is where you upload your vendors' inventory reports. It is recommended that all your vendors provide their reports on a specified date each month, so you have a common reference date for all your materials regardless of where they are stored. Recommend to your vendors that they format their files to match the column titles in the system. **NOTE***:* CodySoft® is completely vendor agnostic.
    a. From the **File to Upload** field, click **Browse** to select the file to upload from your computer.
    b. After selecting the file, click **Open**.
    c. Select the **Vendor Name** from its drop-down list.
    d. Match the column titles from the uploaded file, where necessary, to the system.
    e. Click **Save**.
3. **Create Inventory Reorder Levels** – This is where you set reorder quantities for each SKU. **NOTE**: For each SKU, you can create multiple inventory reorder levels. For example, if a particular SKU has a higher usage volume during Open Enrollment than

during the rest of the year, you would create separate reorder levels for each time period.

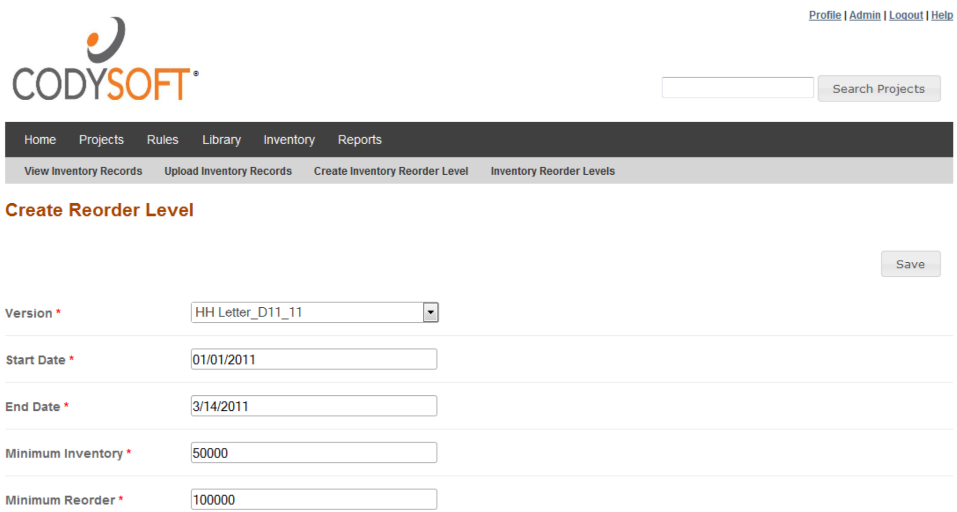
a. **Version** – This is the SKU, or item number, for each material.

b. **Start Date** – This is the date you want to start tracking the SKU’s current quantity.

c. **End Date** – This is the date you want to stop tracking the SKU’s current quantity for a specified minimum quantity. If the quantity reaches the specified minimum inventory level during this period, evaluate the need for reordering the material.

d. **Minimum Inventory** – This is where you specify the minimum quantity (aka “low stock number”) of a SKU allowed in inventory (for a specific timeframe) before you consider reordering the material.

e. **Minimum Reorder** – This is the minimum quantity to be reordered when a SKU has reached its minimum inventory level for a specified timeframe.



Create Inventory Reorder Level

4. **Inventory Reorder Levels** – Click to view a report showing all SKU inventory reorder levels and associated dates.

Reports

With CodySoft®’s reporting feature, you can generate, save and print reports easily.

Accessing reports

1. From the main menu bar, click **Reports**.
2. Select Web Reports, Xlsx Reports, or Chart Visualizations. Web reports are output in a browser and can be saved in a variety of formats. Xlsx reports are output as Excel files. Chart Visualizations provides data analytics in graphic formats.

Web Reports

Overview of Web Reports

1. **Weekly Production Meeting** – This report includes each active project, its tasks, assigned staff and percent complete for each task.
2. **Daily Tasks** – This report is used by managers to view their staff's current daily tasks. It provides an at-a-glance view of workloads to help prioritize tasks with conflicting due dates.
3. **Past Due Tasks** – Similar to a "red flag" report, this report shows a list of tasks pending completion with due dates that are past due.
4. **Workload Balance Report** – This report takes the "estimated hours" data form each task in your production schedules and totals it for each staff member. This tool is useful for planning and task delegation of work coming into the department.
5. **Weekly Executive Report** – This report allows company executives to see all projects and their associated tasks currently in your system.
6. **Project Status By LOB** – This report sorts your projects by line of business.
7. **Medicare Communications Materials Tracking** – This report has detailed information about each material that is currently in development and its status.
8. **Custom Report** – See *Custom Reports*

Downloading Web reports into Excel (or other formats)

1. In a report, **select a format** from the **Export** drop-down list.
2. Click **Export**.
3. Click **OK** to open your report in the chosen format.

Xlsx Reports

Overview of Xlsx Reports

1. **Materials Tracker – Communications** – This report includes detailed information on projects, including the following columns:
   a. Job #
   b. Material ID
   c. LOBs
   d. Project Name
   e. Project Due Date
   f. Contract and Plan ID
   g. Project Status
   h. Requestor

i. Project Manager
j. Departments
k. Business Owners
l. Media Type
m. Regulatory Project Type
n. Latest non-completed task
o. Last Assigned Task Owner
p. Task Start Date
q. Task Due Date
r. #Tasks Completed
s. Submission Type
t. CMS Submission Date
u. CMS Disposition Date / Type
v. Translation Required
w. Layout/Design

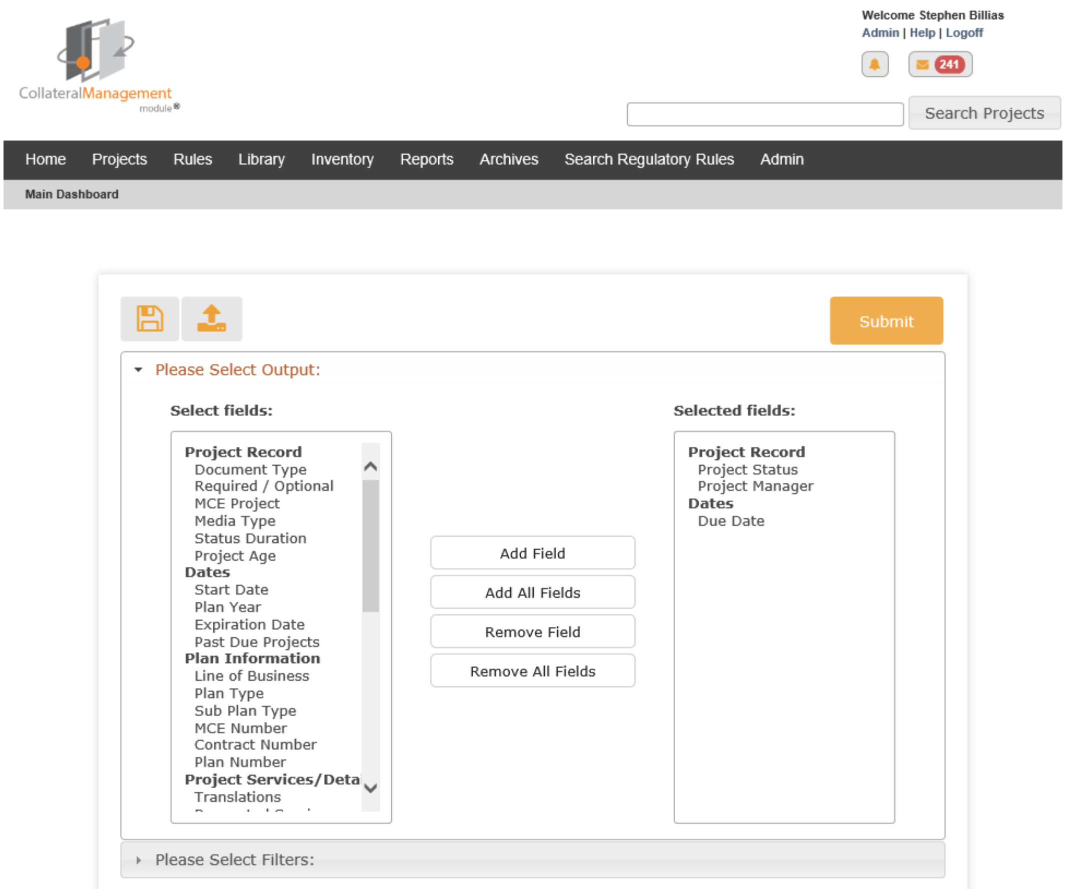
2. **Materials Tracking - Compliance** – This report contains information that is useful to a Compliance Manager, including the following columns:
    a. Material ID
    b. Job #
    c. LOBs
    d. Project Name
    e. Project Due Date
    f. Project Status
    g. Requestor
    h. Project Manager
    i. Departments
    j. Business Owners
    k. Media Type
    l. Regulatory Project Type
    m. Latest non-completed task
    n. Last Assigned Task Owner
    o. Submission Type
    p. CMS Submission Date
    q. CMS Disposition Date / Type
    r. Translation Required

3. **Materials Tracking - Status** – This report provides detailed information on project status of materials, including the following columns:
    a. Project Number and Name
    b. Project Status
    c. Material
    d. Request Date
    e. Project Workflow
    f. Requestor
    g. Review Stream
    h. Task
    i. Assigned Task Owner
    j. Task Start
    k. Task Finish
    l. SLA
    m. Duration

Custom Reports

The Collateral Management Module® has a custom reporting tool that allows you to choose the fields from the application on which you want to report.

1. Select **Custom Report** from **Web Reports**
2. **Choose your output –** The output is your selection of fields for your custom report. To add a new field, highlight the field on the left, and click **Add Field** in the center column. The field is added to your output column:



Selecting Output for Custom Report

Here is a list of the available fields and their categories:

Project Record

Document type

Required/Options

MCE Project

Media Type

Status Duration

Project Age

Dates

- Start Date
- Due Date
- Plan Year
- Expiration Date
- Past Due Projects

Plan Information

- Line of Business
- Plan Type
- Sub Plan Type
- MCE Number
- Contract Number
- Plan Number

Project Services/Data

- Translations
- Requested Services
- Audience
- Compliance

Requestor Information

- Business Owner
- Department
- Project Requestor
- Request Date

Tasks/Scheduling

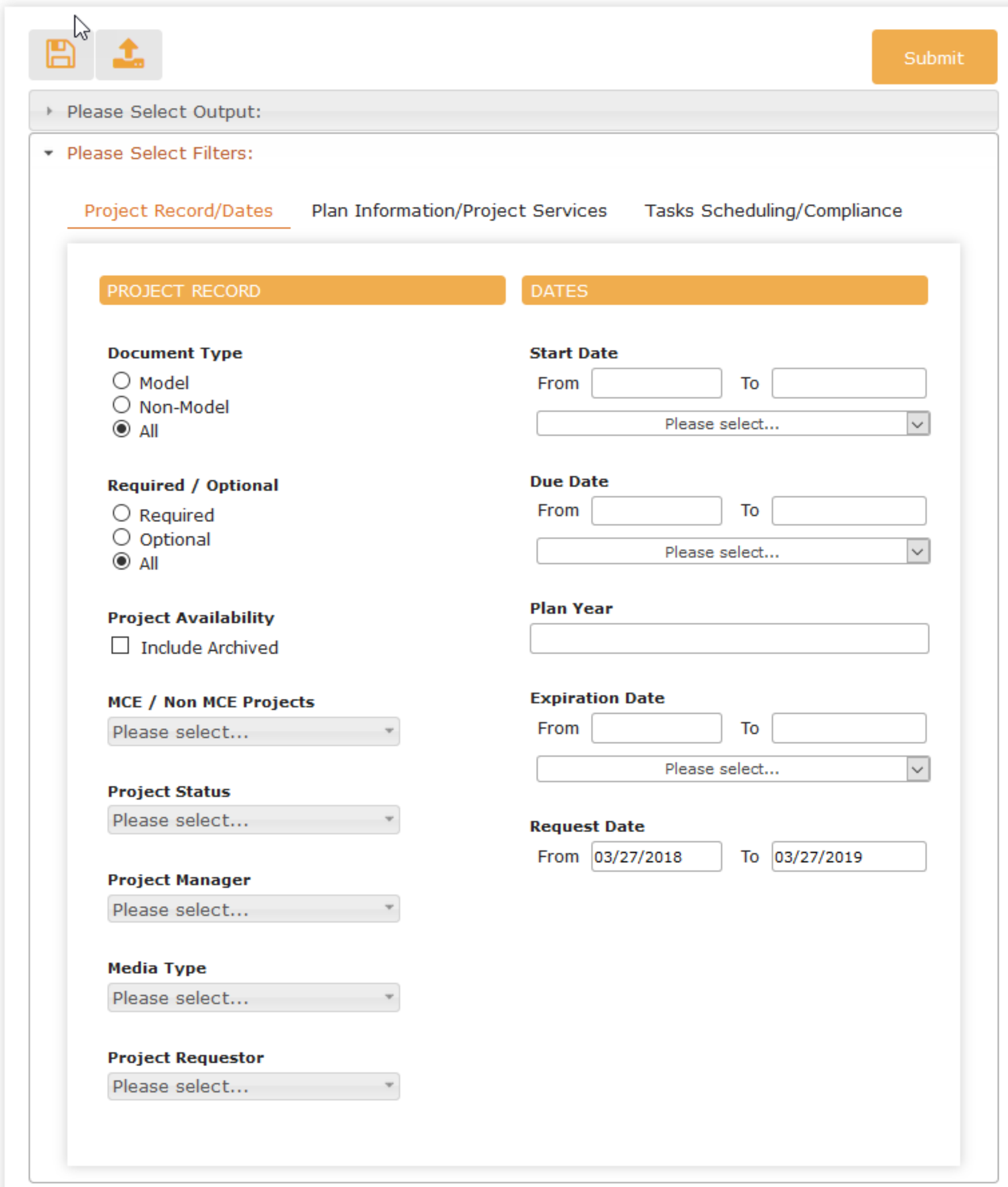
- Task Number
- Task Title
- Task Start Date
- Task Due Date
- Task Progress
- Task Completed ON
- Task Assigned To
- Task Assignee Department
- Task Duration
- Past Due Tasks
- Task SLA (Service Level Agreement)

Compliance Information

- Compliance Type
- Submission Type
- Submission Date
- Disposition
- Disposition Date

Once you have selected your desired fields, click **Please Select Filters.** You can filter the output that you have selected by three categories:

- Project Record Dates
- Plan Information/Project Services
- Task Scheduling/Compliance



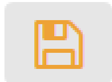
NOTE: On the Start Date, Due Date, and Expiration Date fields on the Project Record/Dates tab, you can filter by date from a dropdown list that includes standard intervals, such as This week, Last Week, This Month, or Last Month. You can select whether to include Archived projects also.

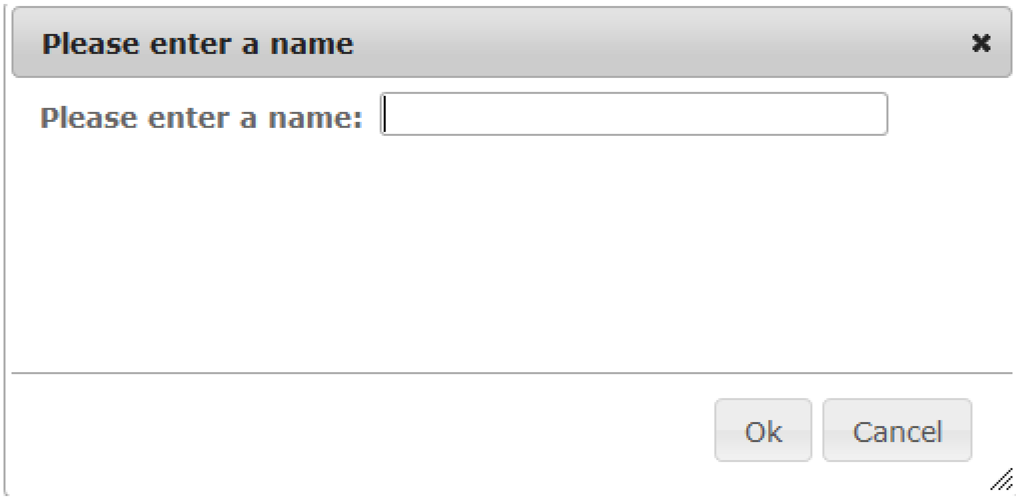
The Collateral Management Module® highlights the fields (output) that you selected in the Select Output section, making it easier for you to find the fields that you have chosen.

1. After you select your filters, click **Submit**.
2. After your report has been processed, click **Download Report** to open the report in Excel.

Saving Custom Reports

You can save your choices of fields and filters as a reusable custom report:

1. Make your selections for fields and filters for a custom report
2. Click the Save icon . The naming dialog box displays:

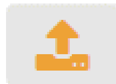


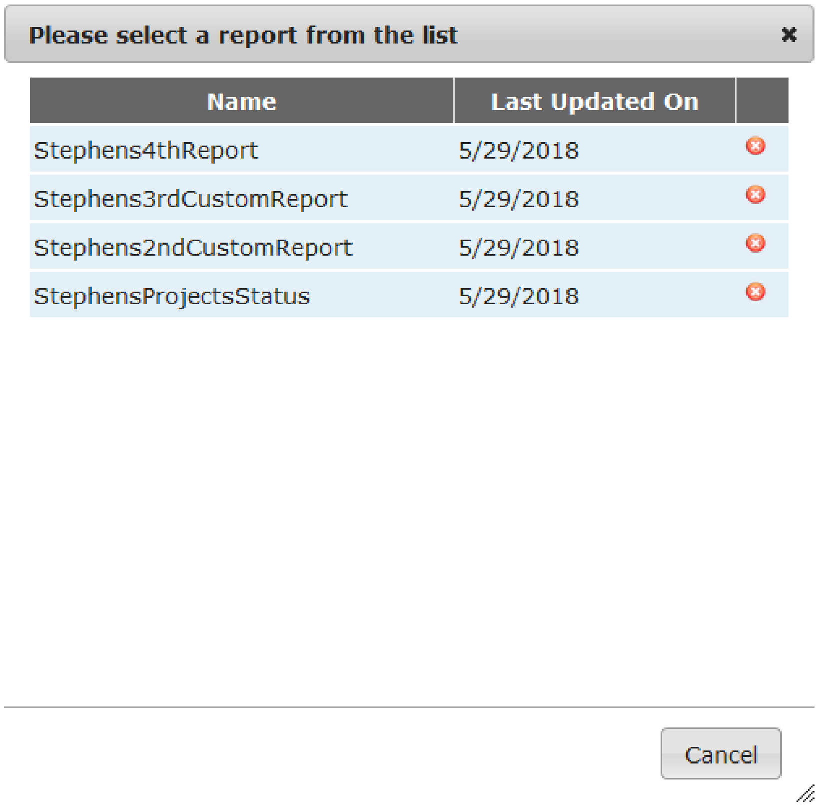
3. Enter a name for your saved fields and filters
4. Click **OK**.

You can then Submit the report and download it.

Reusing custom report settings

You can re-use saved choices of fields and filters

1. Click the Upload icon . A list of saved custom report settings displays:



2. Select a previously saved report from the list. The custom report fields and filter populate with your previous choices.

NOTE: You can revise the choices before you submit the report.

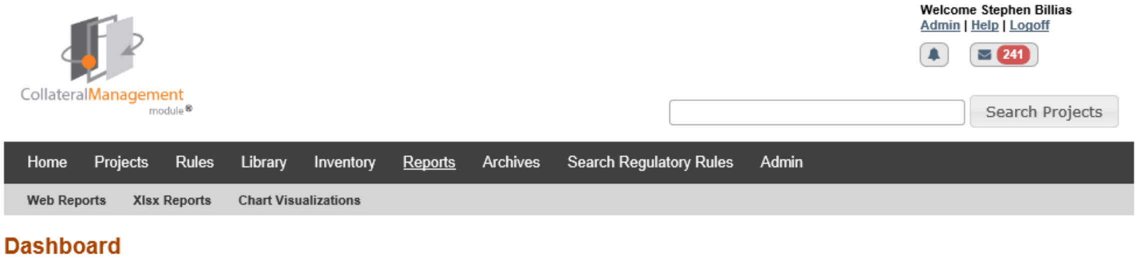
Chart Visualizations

You can view certain report data in seven highly configurable charts:

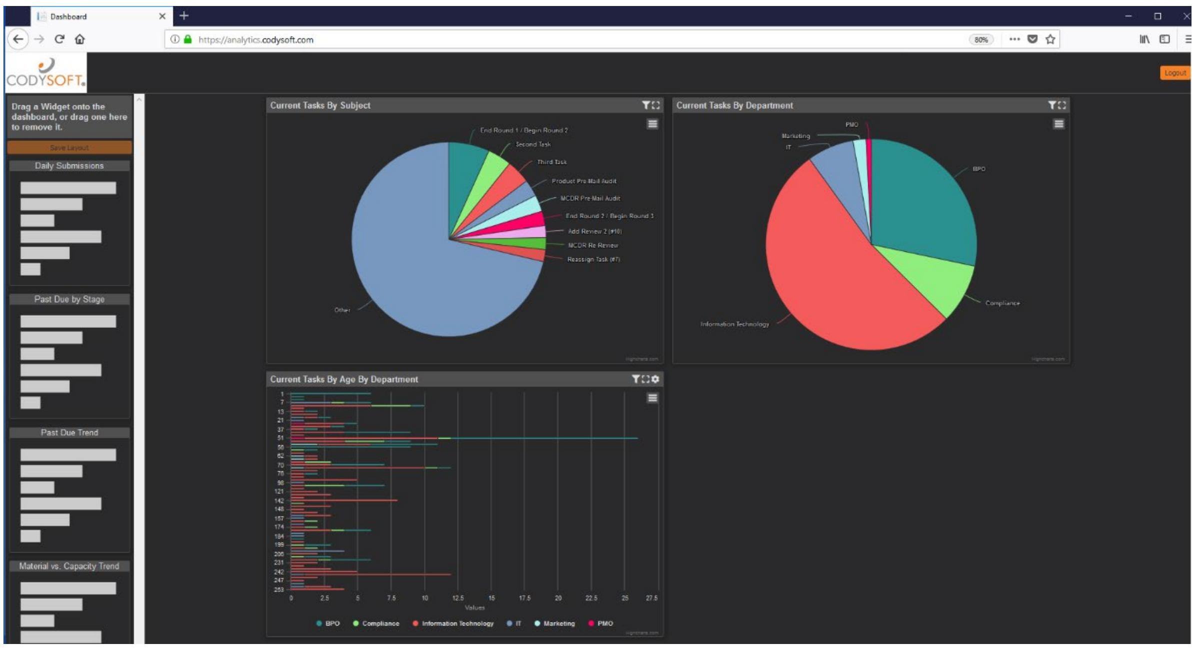
- Current Tasks By Subject
- Current Tasks By Department
- Current Tasks By Age By Department
- Daily Submissions
- Past Due By Stage
- Past Due Trend
- Material vs. Capacity Trend

NOTE: You must have Executive privileges in your CodySoft user profile to access these chart visualizations. If you are unsure of your user privileges, please contact your system administrator.

From the Reports menu, select **Chart Visualizations**:



The three “Current Tasks” charts (By Subject, By Department, and By Age By Department) display on the main screen:

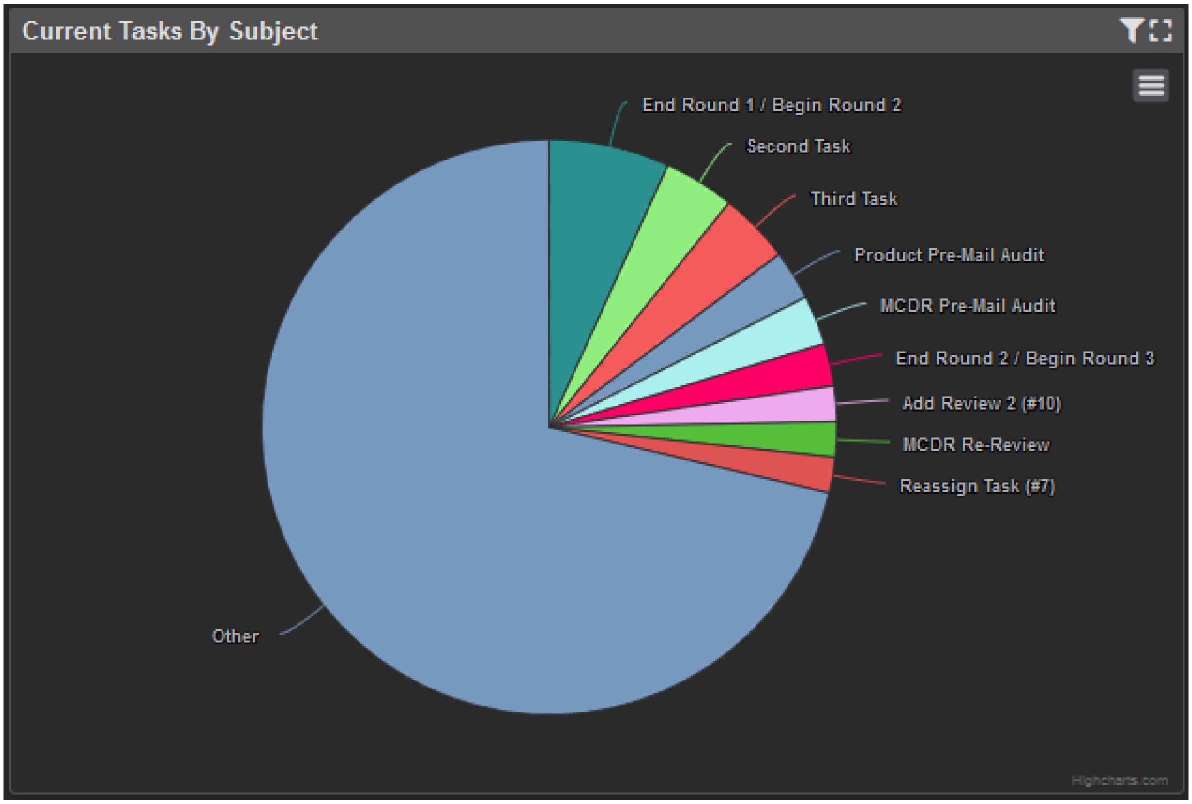


The four remaining charts are available on the left side of the screen.
Click and drag any chart on the left to add it to the main display on the right. In addition to adding charts to the main display, you can move the charts around. You can also remove any chart by clicking and dragging from the right to the left.
Click **Save Layout** to save the organization of the display as the default view when you access Chart Visualizations.

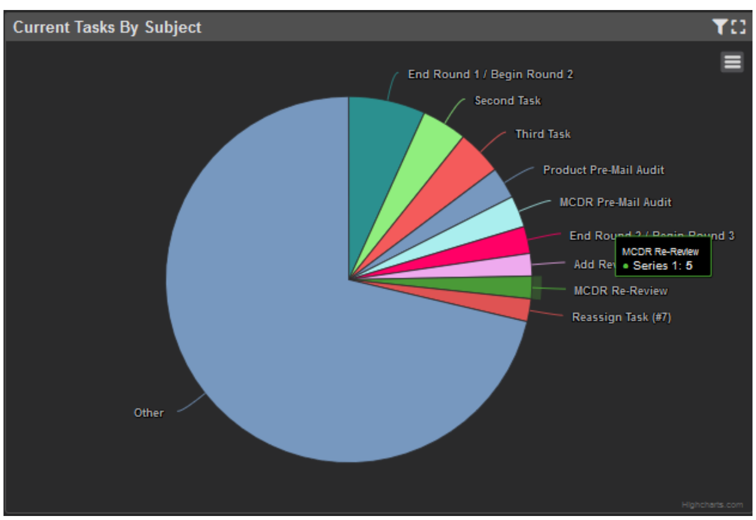
Each chart is described in detail in the following sections.

Current Tasks By Subject

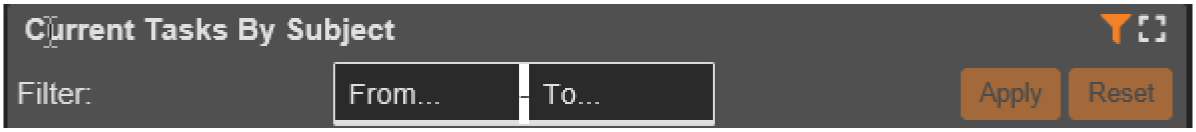
The **Current Tasks by Subject** chart provides detail on the number of tasks in each stage of the schedule for projects:



Use this chart to analyze in which stage open project tasks are located. Hover over any task in the chart to see a count of the number of items in that category. For example, in the chart below, there are 5 tasks in MCDR Re-Review:



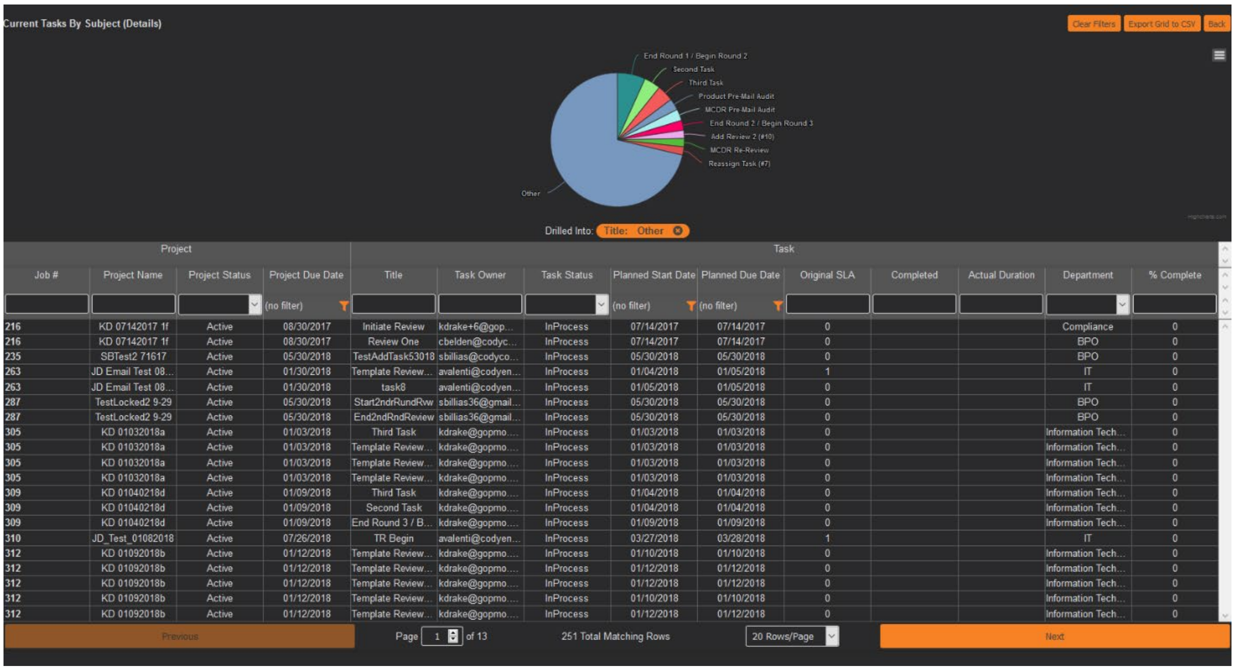
Click the funnel icon to filter on a range of dates:



Click **Apply** to use the dates you have entered or click **Reset** to cancel out the field filters.

Click the Enlarge icon to view a larger version of the chart.

Double-click on the chart to display the details in a spreadsheet format:



Project				Task									
Job #	Project Name	Project Status	Project Due Date	Title	Task Owner	Task Status	Planned Start Date	Planned Due Date	Original SLA	Completed	Actual Duration	Department	% Complete
			(no filter)				(no filter)	(no filter)					
216	KD 07142017 1f	Active	08/30/2017	Initiate Review	kdrake+6@gop...	InProcess	07/14/2017	07/14/2017	0			Compliance	0
216	KD 07142017 1f	Active	08/30/2017	Review One	cbelden@codyc...	InProcess	07/14/2017	07/14/2017	0			BPO	0
235	SBTest2 71617	Active	05/30/2018	TestAddTask53018	sbillias@codyco...	InProcess	05/30/2018	05/30/2018	0			BPO	0
263	JD Email Test 08...	Active	01/30/2018	Template Review...	avalenti@codyen...	InProcess	01/04/2018	01/05/2018	1			IT	0
263	JD Email Test 08...	Active	01/30/2018	task8	avalenti@codyen...	InProcess	01/05/2018	01/05/2018	0			IT	0
287	TestLocked2 9-29	Active	05/30/2018	Start2ndrRundRvw	sbillias36@gmail...	InProcess	05/30/2018	05/30/2018	0			BPO	0
287	TestLocked2 9-29	Active	05/30/2018	End2ndRndReview	sbillias36@gmail...	InProcess	05/30/2018	05/30/2018	0			BPO	0
305	KD 01032018a	Active	01/03/2018	Third Task	kdrake@gopmo....	InProcess	01/03/2018	01/03/2018	0			Information Tech...	0
305	KD 01032018a	Active	01/03/2018	Template Review...	kdrake@gopmo....	InProcess	01/03/2018	01/03/2018	0			Information Tech...	0
305	KD 01032018a	Active	01/03/2018	Template Review...	kdrake@gopmo....	InProcess	01/03/2018	01/03/2018	0			Information Tech...	0
305	KD 01032018a	Active	01/03/2018	Template Review...	kdrake@gopmo....	InProcess	01/03/2018	01/03/2018	0			Information Tech...	0
309	KD 01040218d	Active	01/09/2018	Third Task	kdrake@gopmo....	InProcess	01/04/2018	01/04/2018	0			Information Tech...	0
309	KD 01040218d	Active	01/09/2018	Second Task	kdrake@gopmo....	InProcess	01/04/2018	01/04/2018	0			Information Tech...	0
309	KD 01040218d	Active	01/09/2018	End Round 3 / B...	kdrake@gopmo....	InProcess	01/09/2018	01/09/2018	0			Information Tech...	0
310	JD_Test_01082018	Active	07/26/2018	TR Begin	avalenti@codyen...	InProcess	03/27/2018	03/28/2018	1			IT	0
312	KD 01092018b	Active	01/12/2018	Template Review...	kdrake@gopmo....	InProcess	01/10/2018	01/10/2018	0			Information Tech...	0
312	KD 01092018b	Active	01/12/2018	Template Review...	kdrake@gopmo....	InProcess	01/12/2018	01/12/2018	0			Information Tech...	0
312	KD 01092018b	Active	01/12/2018	Template Review...	kdrake@gopmo....	InProcess	01/12/2018	01/12/2018	0			Information Tech...	0
312	KD 01092018b	Active	01/12/2018	Template Review...	kdrake@gopmo....	InProcess	01/10/2018	01/10/2018	0			Information Tech...	0
312	KD 01092018b	Active	01/12/2018	Template Review...	kdrake@gopmo....	InProcess	01/12/2018	01/12/2018	0			Information Tech...	0

You can filter on any column, and you can use partial filtering on any column to retrieve data without an exact match

Note the record count at the bottom center of the screen that provides numeric detail on the results of a filtering action. You can filter on multiple columns to provide a targeted count, for example you could filter to obtain a count of all projects of a specified name with a specified task owner and task status.

Click **Clear Filters** to reset the spreadsheet.

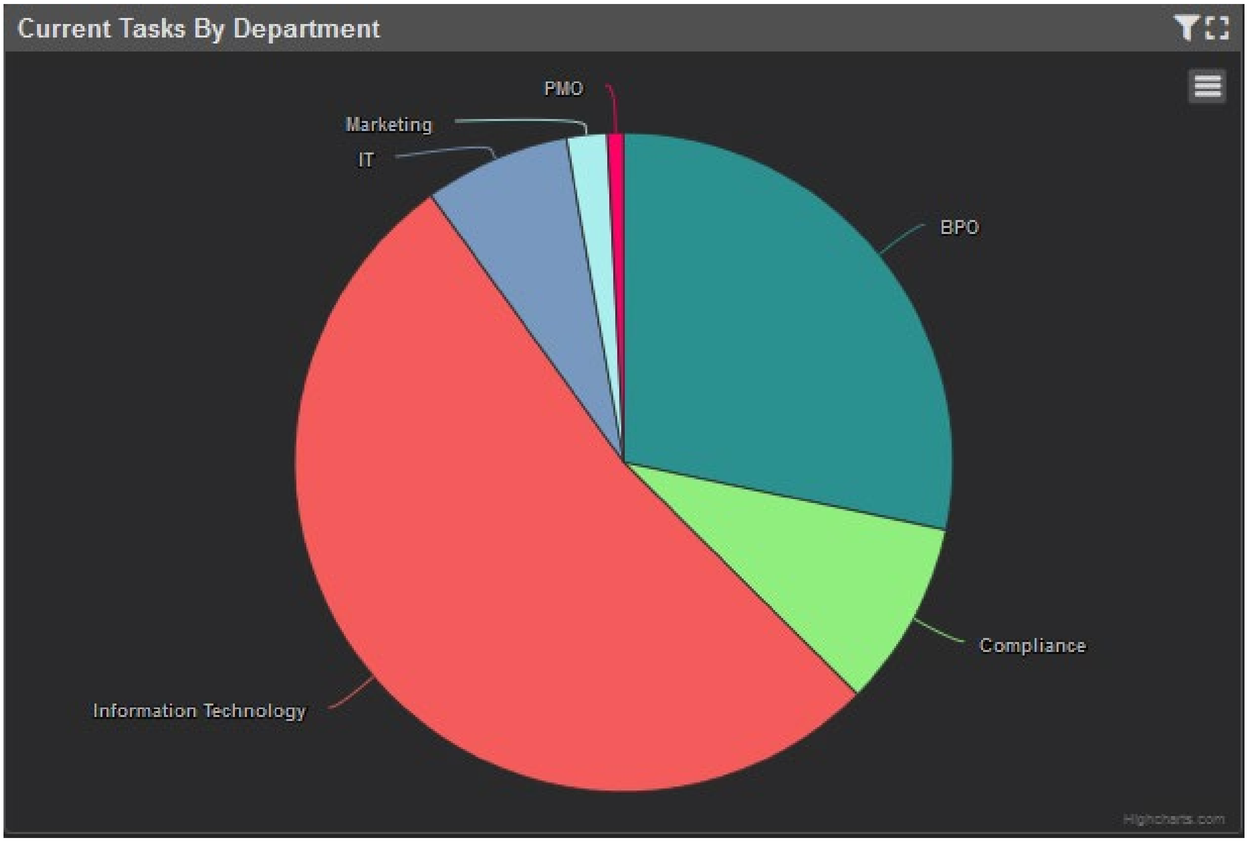
Click **Export Grid to CSV** to export a copy of data.

Use the **Previous** and **Next** buttons to navigate through the spreadsheet.

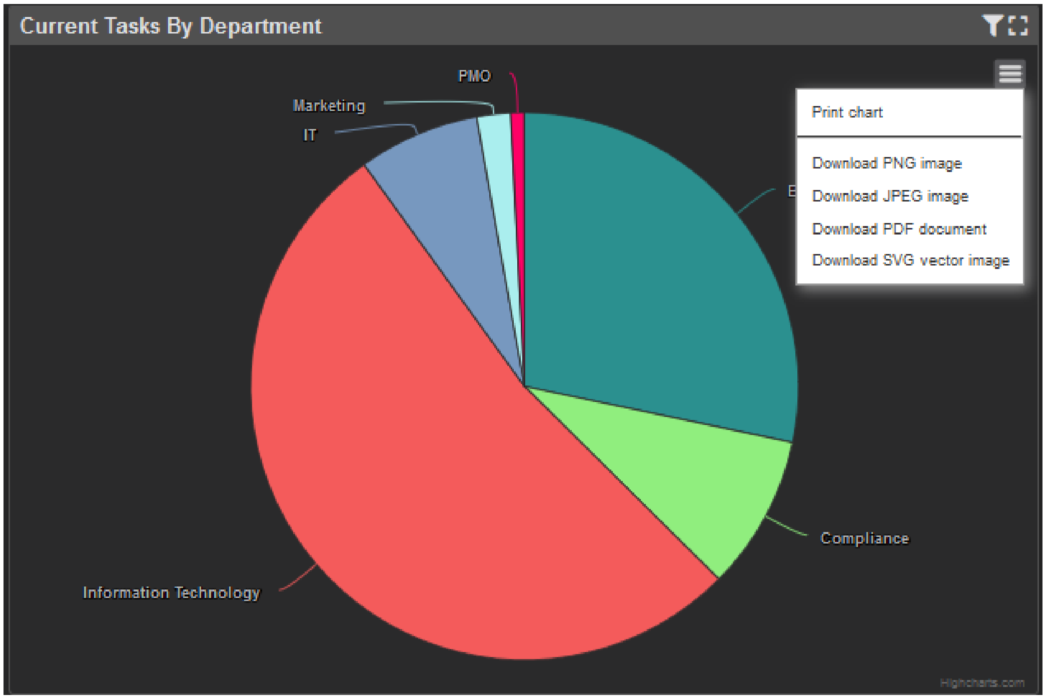
Click **Back** to return to the chart view.

Current Tasks By Department

The **Current Tasks By Department** chart provides detail on the number of tasks in each stage of the schedule for projects:



Use this chart to analyze in which departments project tasks are located. You can filter on a range of dates or enlarge the chart. Additionally, click the list icon  to print the chart or download the chart as an image in a variety of formats:



Double-click on the chart to display the detail in a spreadsheet format:

You can filter on any column.

Click **Clear Filters** to reset the spreadsheet.

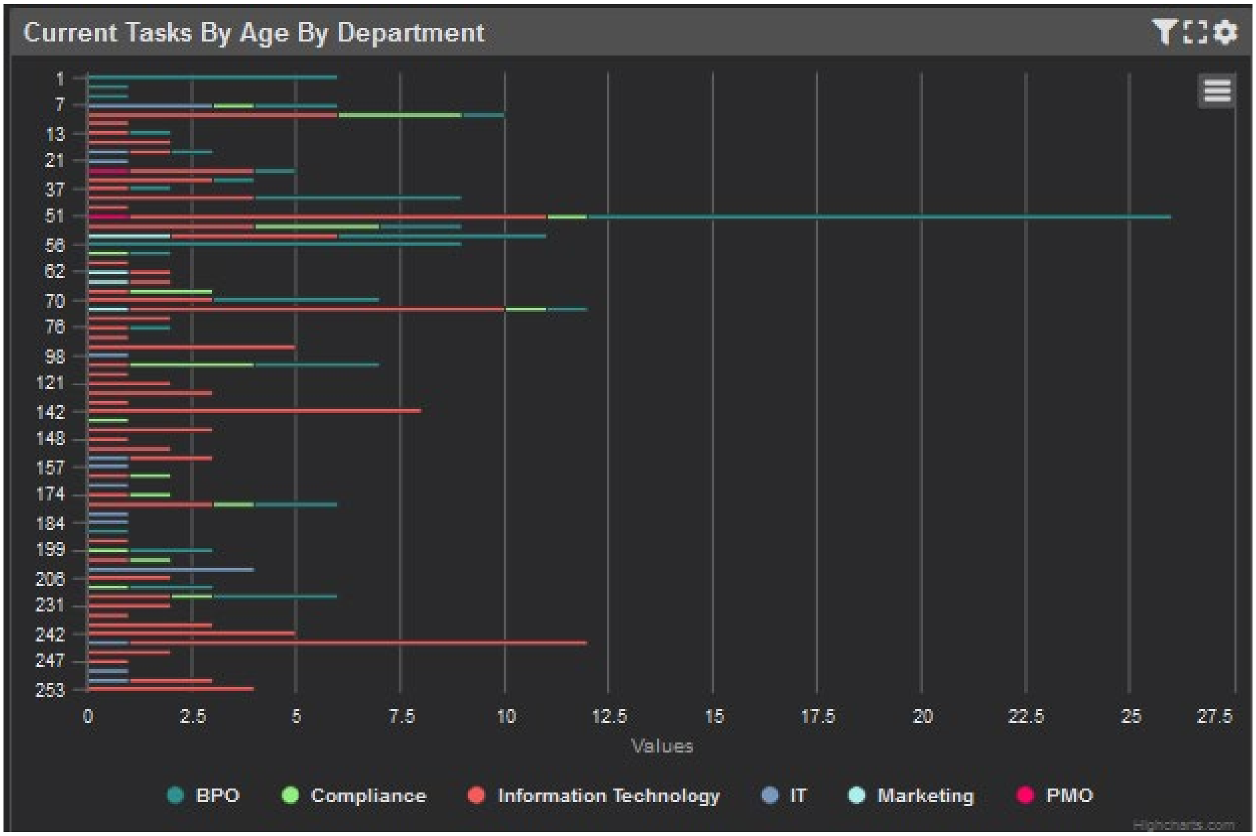
Click **Export Grid to CSV** to export a copy of data.

Use the **Previous** and **Next** buttons to navigate through the spreadsheet.

Click **Back** to return to the chart view.

Current Tasks By Age By Department

The **Current Tasks By Age By Department** chart provides detail on the number of project tasks owned by each department:

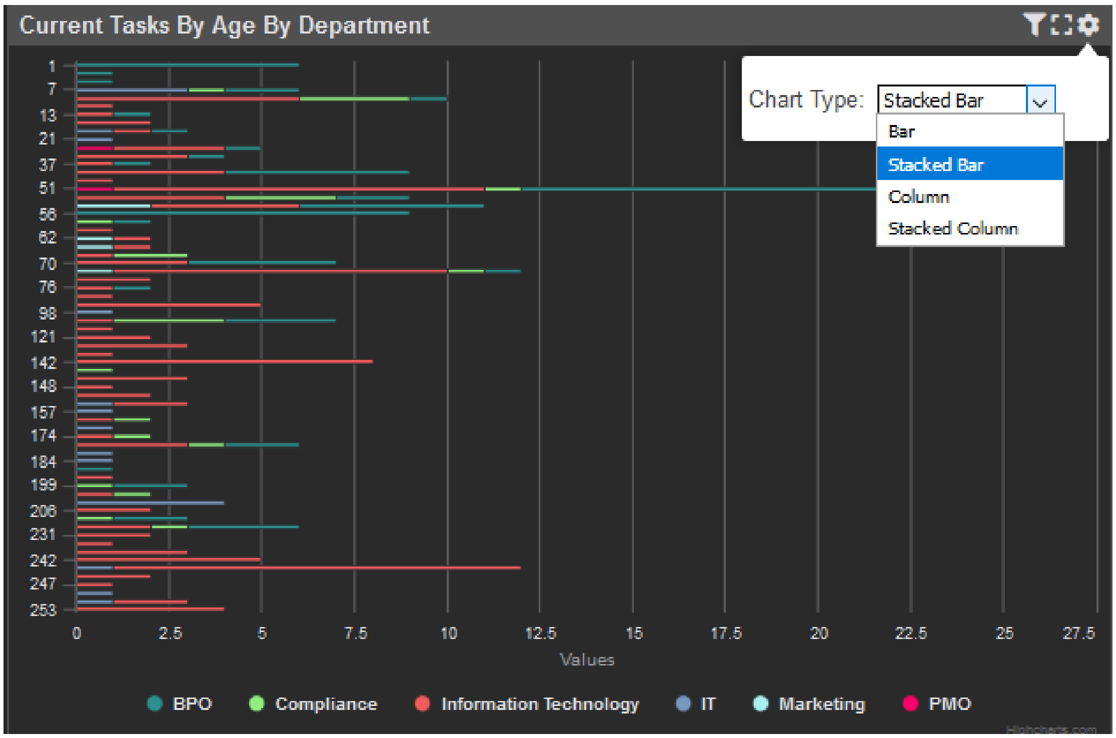


Use this chart to analyze where project tasks are located by department.

Click the button to next to a department name to exclude it from the chart. When a department is excluded, the button is greyed out and the data for that department does not display in the chart. You can exclude multiple departments to refine and narrow the chart data.

You can filter on a range of dates or enlarge the chart. Additionally, click the list icon  to print the chart or download the chart as an image in a variety of formats.

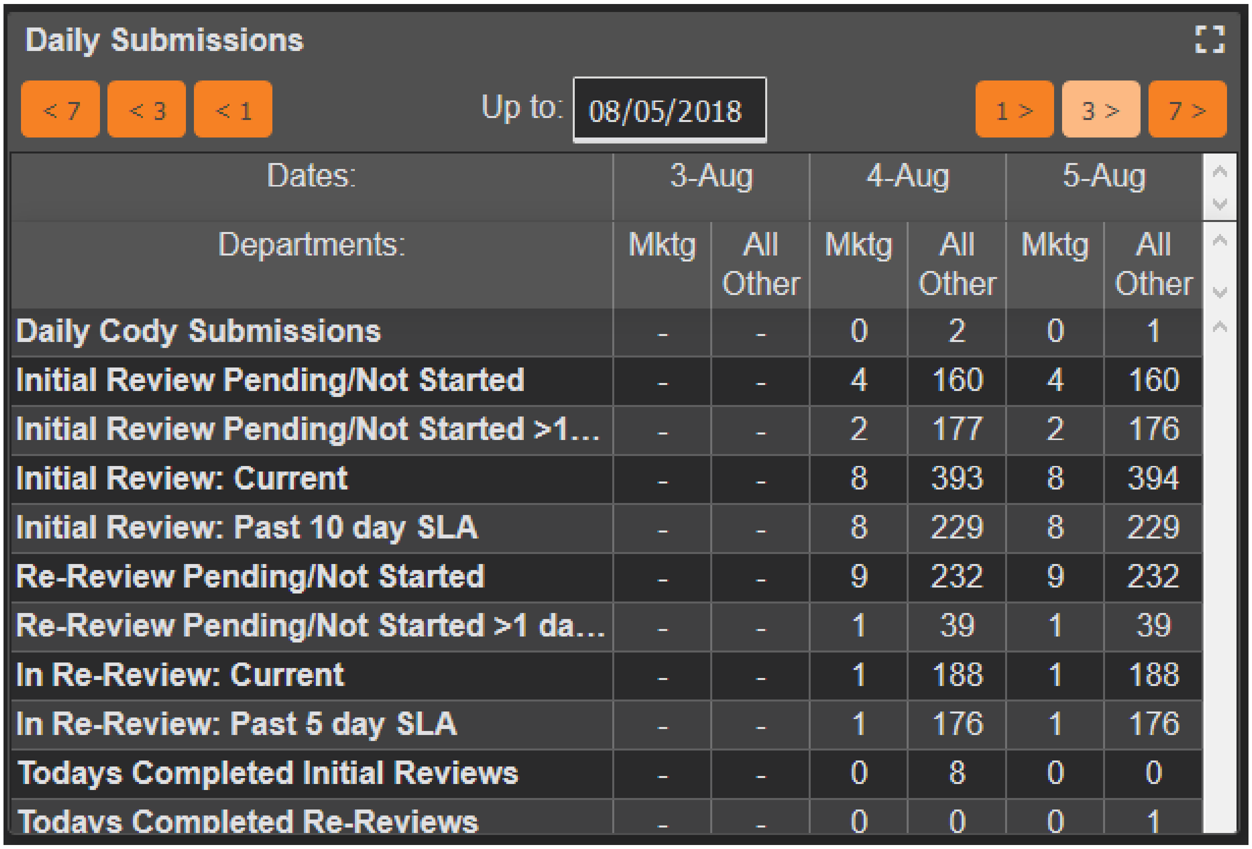
Click the Settings icon  to change the Chart Type:



Double-click on the chart to display the detail in a spreadsheet format.

Daily Submissions

The **Daily Submissions** chart displays the number of new project submissions that are made each day and also how many tasks are in each stage of the projects:



Daily Submissions

< 7 | < 3 | < 1 | Up to: 08/05/2018 | 1 > | 3 > | 7 >

Dates:	3-Aug		4-Aug		5-Aug	
Departments:	Mktg	All Other	Mktg	All Other	Mktg	All Other
Daily Cody Submissions	-	-	0	2	0	1
Initial Review Pending/Not Started	-	-	4	160	4	160
Initial Review Pending/Not Started >1…	-	-	2	177	2	176
Initial Review: Current	-	-	8	393	8	394
Initial Review: Past 10 day SLA	-	-	8	229	8	229
Re-Review Pending/Not Started	-	-	9	232	9	232
Re-Review Pending/Not Started >1 da…	-	-	1	39	1	39
In Re-Review: Current	-	-	1	188	1	188
In Re-Review: Past 5 day SLA	-	-	1	176	1	176
Todays Completed Initial Reviews	-	-	0	8	0	0
Todays Completed Re-Reviews	-	-	0	0	0	1

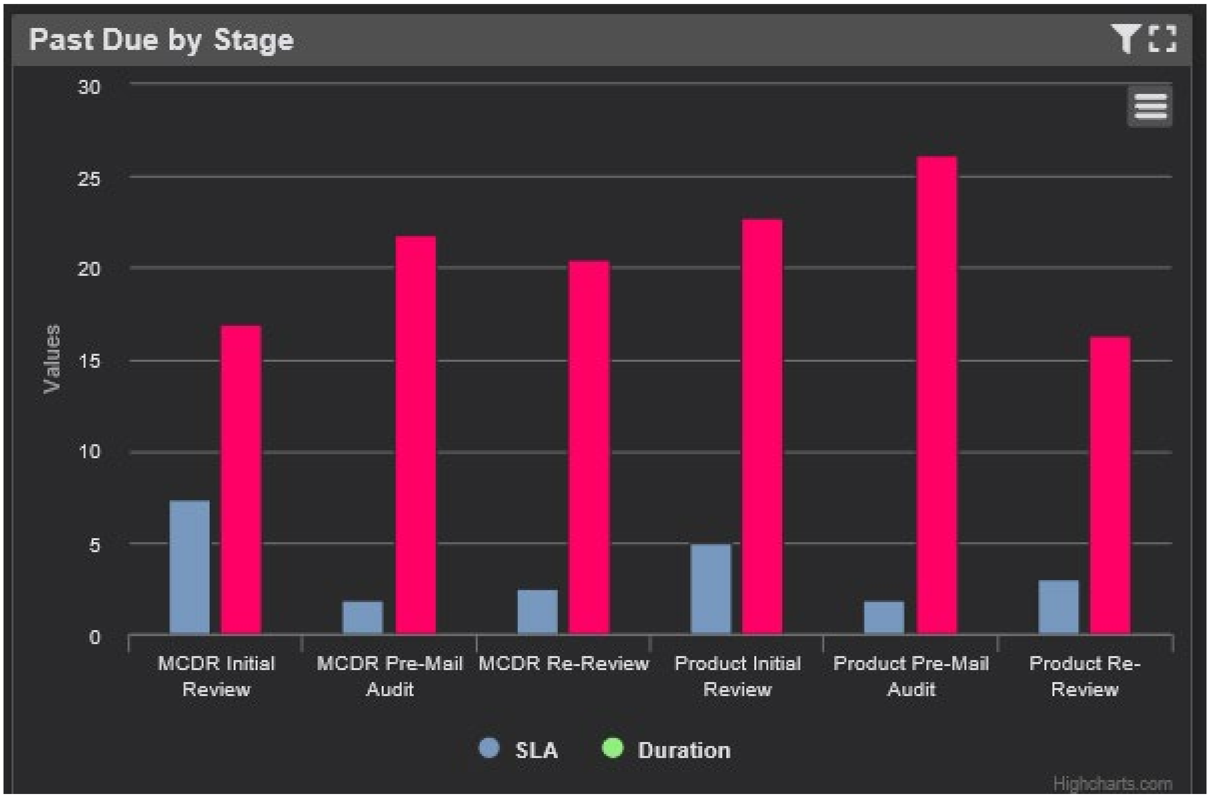
Use this chart to monitor new project submissions and to analyze which stage project tasks are in by date. The chart is divided into Marketing Department submissions and submissions by all other departments. In the **Up to:** field you can specify an end date for the data, to see submissions and project statuses up to a specific date.

Click Enlarge to view a larger version of the chart.

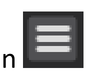
Use the orange buttons to change the dates displayed by intervals of 1, 3, or 7 days in either direction.

Past Due By Stage

The Past Due By Stage chart provides a comparison between the established Service Level Agreement (SLA) for tasks and the actual time it took to complete the task.



Use this task to analyze in which stage projects are past due in relation to their SLAs. Columns in red indicate durations longer than the SLA. Columns in green indicate tasks for which SLAs are being met.

You can filter on a range of dates or enlarge the chart. Additionally, click the list icon  to print the chart or download the chart as an image in a variety of formats.

Double-click on the chart to display the detail in a spreadsheet format.

You can filter on any column.

Click **Clear Filters** to reset the spreadsheet.

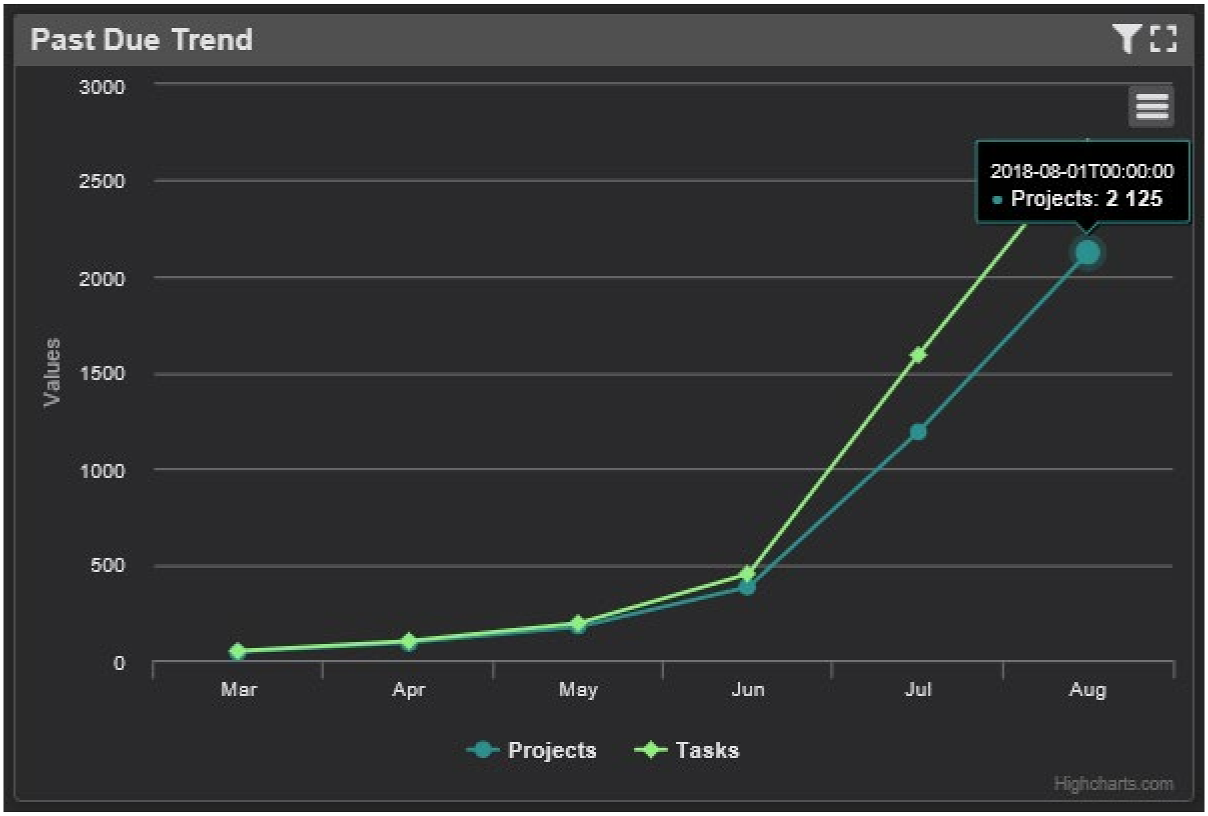
Click **Export Grid to CSV** to export a copy of data.

Use the **Previous** and **Next** buttons to navigate through the spreadsheet.

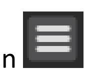
Click **Back** to return to the chart view.

Past Due Trend

The **Past Due Trend** chart displays the volume of tasks and projects over time.



Use this chart to analyze the trend in the number of projects and tasks that have exceeded their Past Due dates.

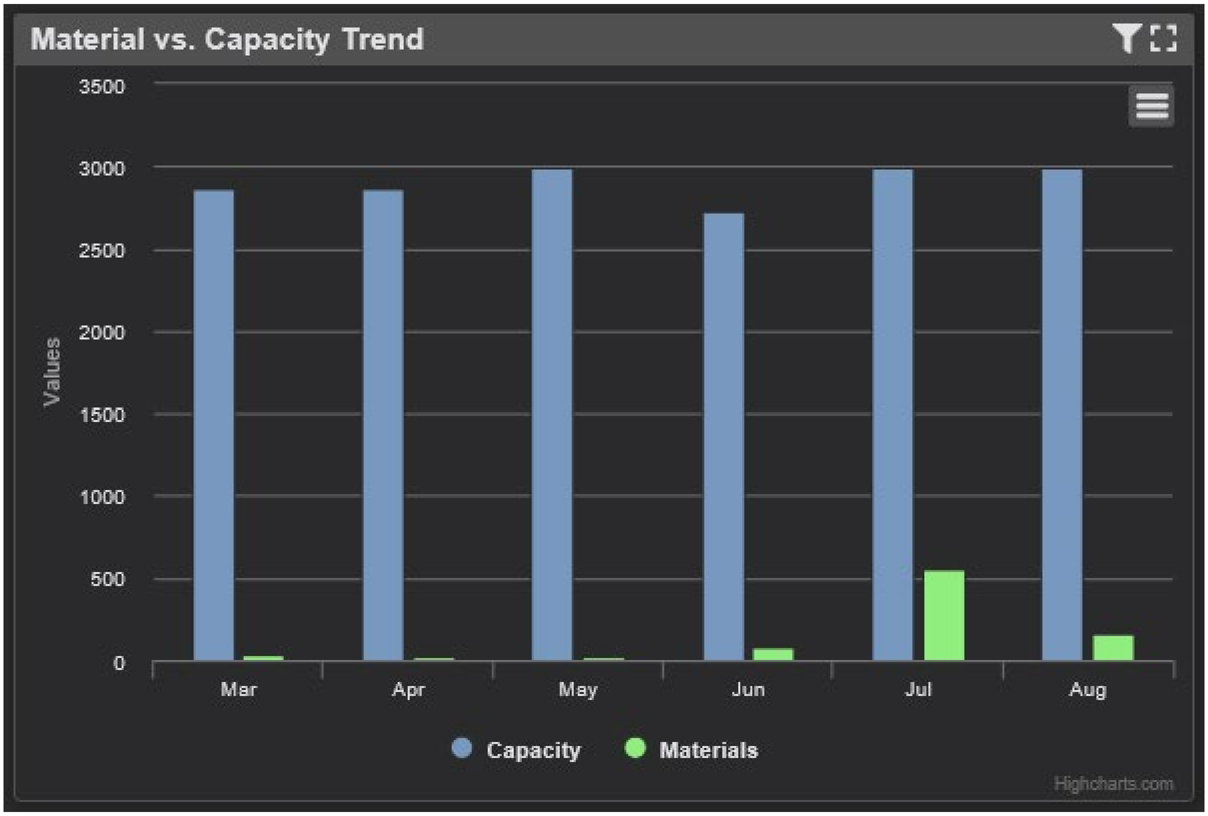
You can filter on a range of dates or enlarge the chart. Additionally, click the list icon  to print the chart or download the chart as an image in a variety of formats.

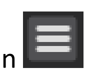
Hover over a data point to see information on that point in the chart.

Double-click on the chart to display the detail in a spreadsheet format.

Material vs. Capacity Trend

The Material vs. Capacity Trend chart shows the volume of materials being worked as compared to the staff capacity for the work. Use this chart to analyze how capacity is trending in relation to the number of active projects.



You can filter on a range of dates or enlarge the chart. Additionally, click the list icon  to print the chart or download the chart as an image in a variety of formats.

Hover over a data point to see information on that point in the chart.

Double-click on the chart to display the detail in a spreadsheet format.

Click **Export Grid to CSV** to export a copy of data.

Use the **Previous** and **Next** buttons to navigate through the spreadsheet.

Click **Back** to return to the chart view.

Logging out of Chart Visualizations

Click **Logout** in the upper right to exit from the Chart Visualizations program to logout of CodySoft completely. Click **Back** to return to the CodySoft Collateral Management application.

Kitting

Make assembling materials for printing and fulfillment easy with CodySoft®'s document kitting tool. CodySoft® bundles your production-ready documents with kit matrices and any other required data elements (such as membership files) for a simple transfer to your chosen vendor.

Creating a kit

1. From the dashboard, select **Library**.
2. From the Library choices, click **Create Kit**.
    a. **Name** – Enter the name of the kit.
    b. **Creation Date** – Enter the date you create the kit.
    c. **Versions** tab – Click **Add Version** to select from the list of **Final Versions** that are stored in CodySoft®.
        i. After selecting versions, click **OK**.
        ii. (**Final Versions** are versions that have been approved and finalized. Their status is set to "Completed" by the Traffic Manager.)
    d. **Attachments** tab – Click **Add Attachment** for pop-up window to appear.
        i. From the **File to Upload** field, click **Browse** to select the file to upload from your computer.
        ii. After selecting the file, click **Open**.
        iii. (**Attachments** are any files you choose to include in the kit from your computer or network.)
3. Click **Exit**.

Editing a kit

1. From the dashboard, select **Library**.
2. From the Library choices, click **Document Kits**.
3. Click the name of the kit you want to edit. The **Edit Kit** screen appears.
4. You can edit kit components as detailed in *Creating a kit*.

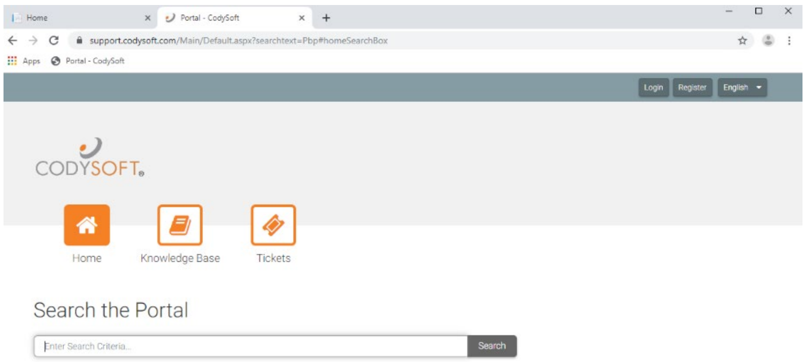
Downloading a kit to a Zip file for transfer to a print vendor

1. In **Edit Kit**, click **Download**. The Zip file window appears.
2. Select **Save File**
3. Click **OK**.
4. The kit contents are saved as a Zip file and downloaded to your computer. You can access this Zip file from where you store your downloads.

Support

In the Support Portal, CodySoft® provides several ways to get more information about how to use the CodySoft product.

1. From any screen in CodySoft, click **Help** in the upper right corner of the screen to enter the Support Portal. The Support Portal home screen displays:



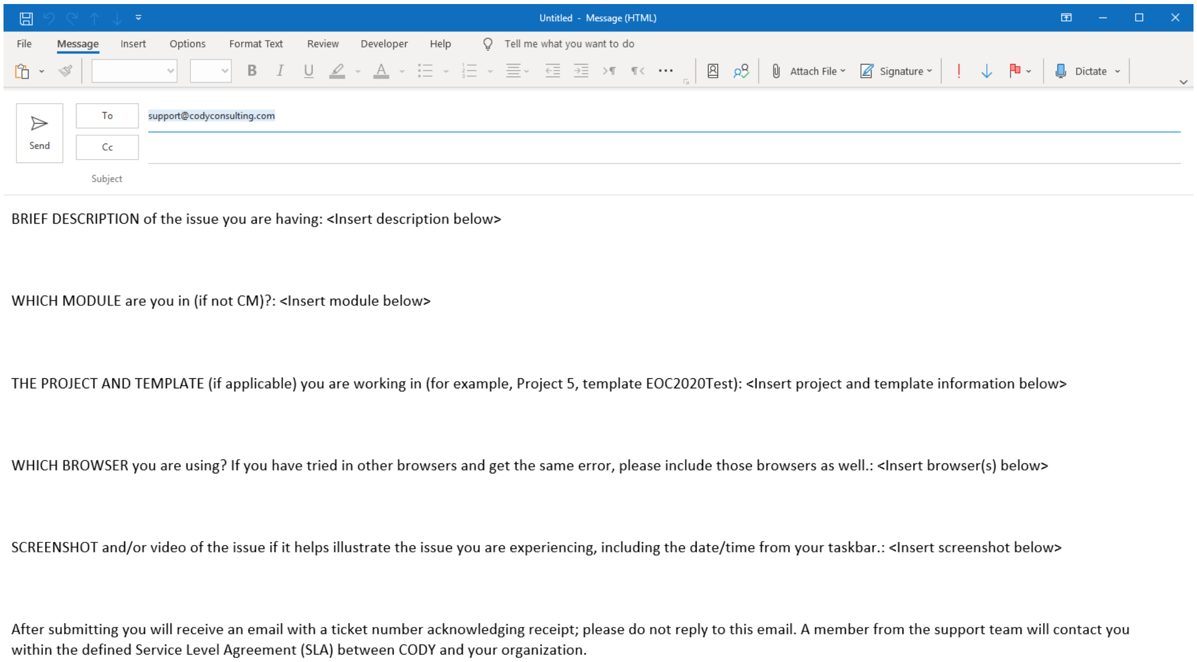
2. From the Support Portal home screen you have three choices:
    a. Knowledge Base
    b. Tickets
    c. Search the Portal

Using the Knowledge Base

1. Click **Knowledge Base** to enter the Knowledge Base
    a. Enter a Search term
    b. Click Search to look for topics related to your search criteria. The system displays a list of relevant Knowledge Base topics.
    c. The Knowledge Base choice provides links to user guide documents on many CODY modules, including a set of videos on how to accomplish basic CodySoft Collateral Management (CM) tasks

Open a Ticket

1. Click **Tickets** to enter a new support ticket:
2. Click **Start Ticket**. An email opens addressed to Cody Support:



3. Fill out the email, providing as much information as possible for each requested item:
    a. Description
    b. Module
    c. Project/Template
    d. Browser
    e. Attached screenshot or video

4. Click **Send.** After you submit the email you will receive an email with a ticket number acknowledging receipt; please do not reply to this email. A member from the support team will contact you within the defined Service Level Agreement (SLA) between CODY and your organization.

Search the Portal

You can search the Support portal, including the Knowledge Base for information.

1. Enter search criteria, for example “PBP.”
2. Click **Search**. Any items related to your search appear below the Search bar, with live links to the information.