

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

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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

 server@codysoft.net
To: [Redacted]

Confirm your access to CodySoft

Please follow the instructions below to confirm your new account with CodySoft within 7 days to avoid account deactivation.

CodySoft Username: [Redacted]

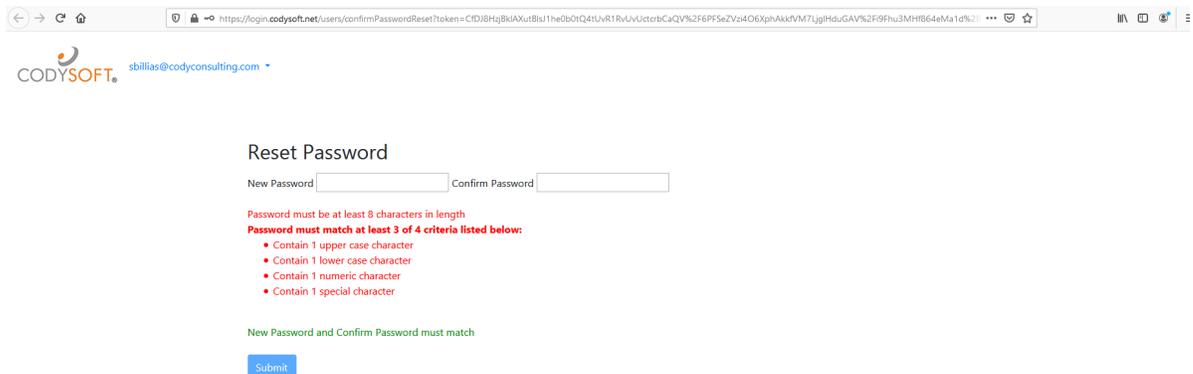
[Please click here to confirm your email address](#)

Thanks!

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.



The screenshot shows a web browser window with the URL <https://login.codysoft.net/users/confirmPasswordReset?token=CfDj8HjBkAXutBtJ1he0t0tQ4LVR1RvL-UctobCaQV%2F6PPSeZv24O6XphAkkV7JgHduGAV%2F99hu3MH864eMa1d%2>. The page title is "Reset Password" and the CodySoft logo is visible. The form contains two input fields: "New Password" and "Confirm Password". Below the fields, there are instructions: "Password must be at least 8 characters in length" and "Password must match at least 3 of 4 criteria listed below:" followed by a bulleted list: "Contain 1 upper case character", "Contain 1 lower case character", "Contain 1 numeric character", and "Contain 1 special character". A note states "New Password and Confirm Password must match". A blue "Submit" button is at the bottom.

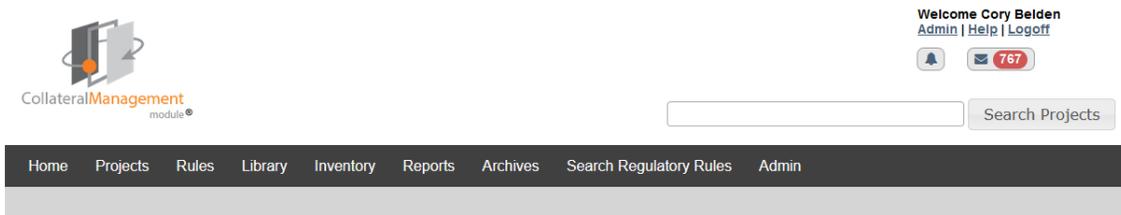
2. In the New Password field, enter a **new password**. Follow the instructions for meeting the password requirement.
3. In the Confirm Password field, enter the **new password** again.
4. Click **Submit**. The login screen displays.

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.



Dashboard

My Projects Tasks My Discussions Submissions Approvals

My Projects New Project

Showing 1 to 10 of 15 entries

Job #	Project Title	Media Type	Status	Due Date	Created By	Created On	# Tasks
153	CY23 MAPD HMO ANOC	ANOC	InProgress	5/31/2022	Al Valenti	4/7/2022	6/8
149	Exhibit 4e: Model Notice of Enrollment Letter	Letter	InProgress	3/16/2022	Al Valenti	3/2/2022	2/4
147	CY22 MAPD HMO Individual SB	SB	InProgress	2/24/2022	Al Valenti	2/10/2022	2/4
146	CY22 MAPD HMO EOC	EOC	InProgress	2/28/2022	Al Valenti	1/31/2022	5/8
144	PY22 Large Group SBC	SB	InProgress	12/30/2021	Al Valenti	12/2/2021	1/3
140	CY22 DSNP EOC	EOC	InProgress	12/31/2021	Cory Belden	11/3/2021	1/3
134	CY22 DSNP ANOC	ANOC	InProgress	9/30/2021	Al Valenti	9/20/2021	2/4
133	PY2022 Marketplace EOC	EOC	Approved	10/29/2021	Al Valenti	9/20/2021	0/0
109	PY2021 MAPD_ANOC	ANOC	InProgress	8/31/2020	Cory Belden	7/30/2020	1/3

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.

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



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	<input type="checkbox"/>

Tasks - Completed Reviews

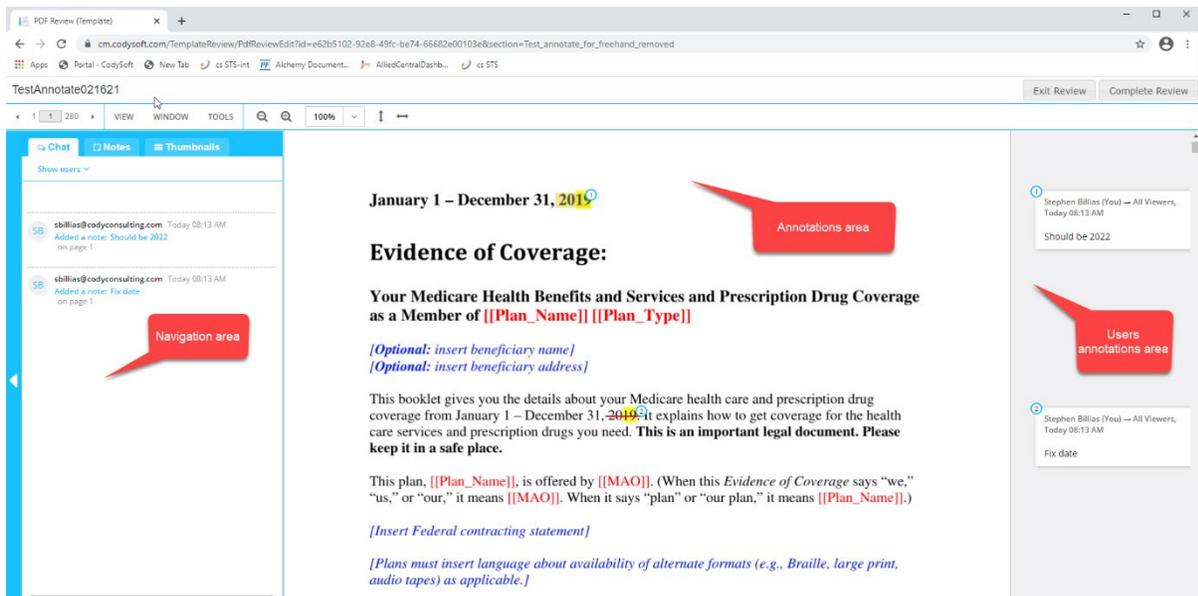
3. In the Edit Method column, click the Markup Tool if a Annotate review (or click Edit File if an Edit File review) to open the file for commenting.

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:



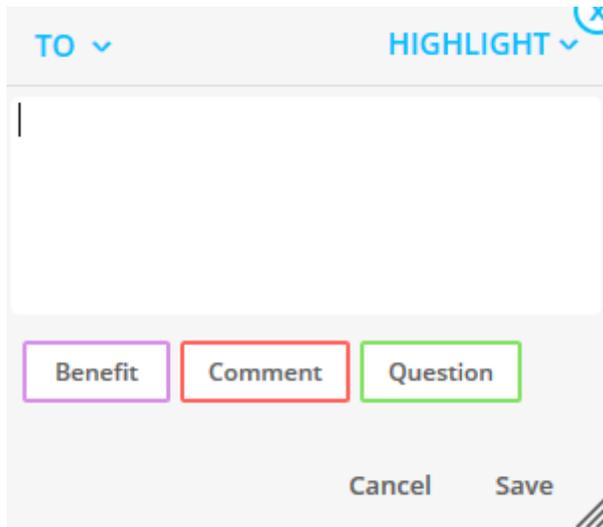
The screen is divided into three main areas:

- **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

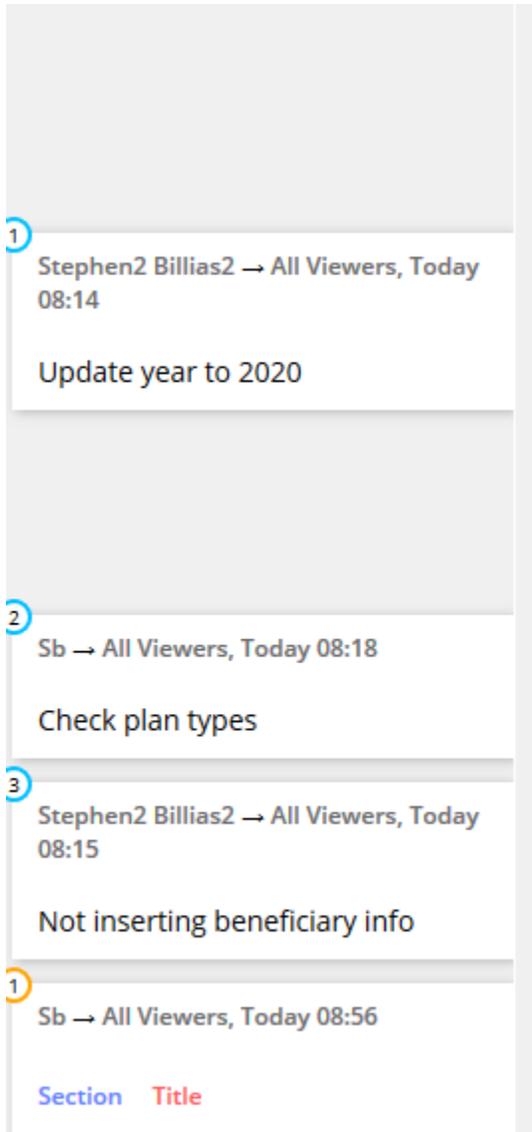
- Questions in green

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

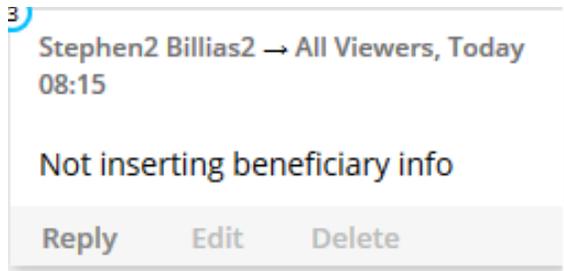
The tool uses your last selection of annotation type for the next annotation. You can change the type when you make the next annotation.

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:

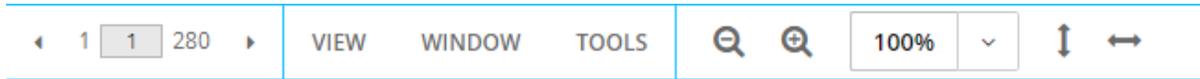


NOTE: You can only delete annotations you have made, not the annotations of others.

Navigation area

Navigation

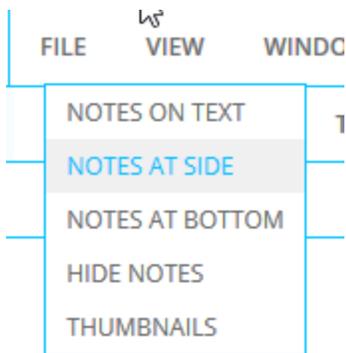
The Navigation area provides many tools for working in the review:



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.

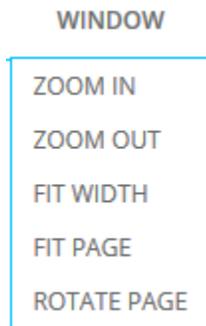
View menu

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.



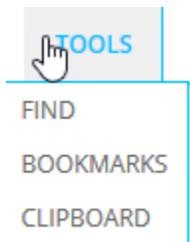
Window menu

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.

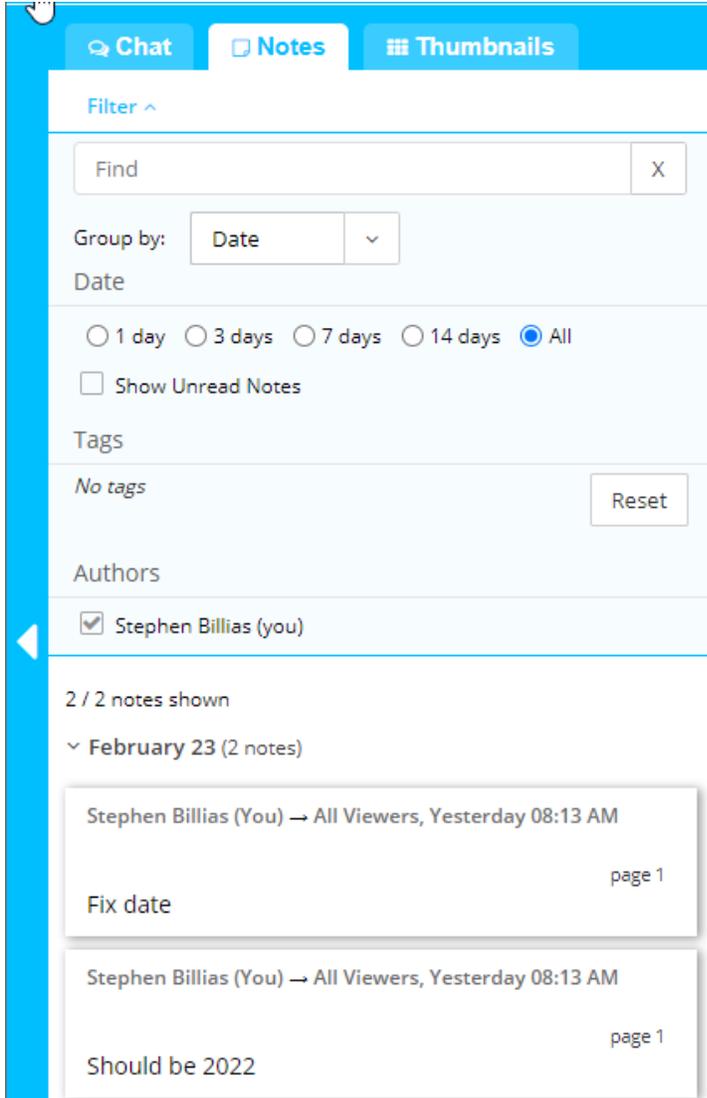


Chat

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.



The screenshot shows a user interface with three tabs: "Chat", "Notes", and "Thumbnails". The "Notes" tab is active. A "Filter" dropdown menu is open, showing the following options:

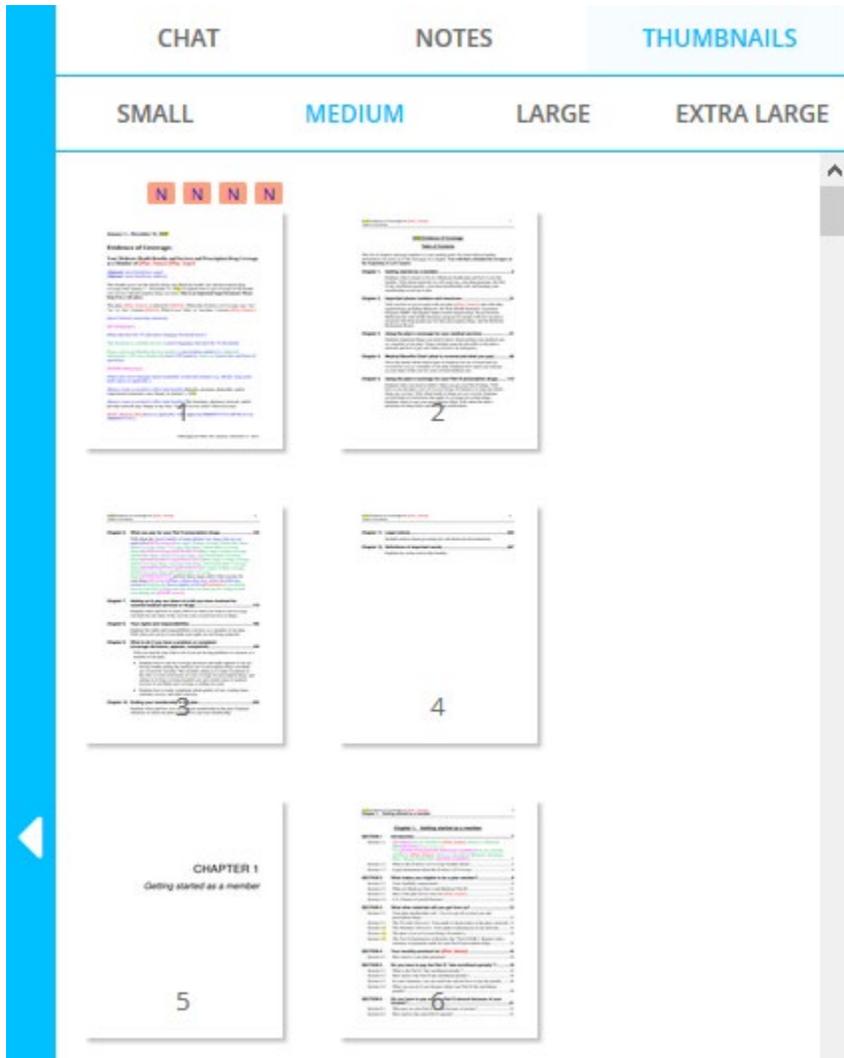
- Find:** A search bar with the placeholder text "Find" and a clear button "X".
- Group by:** A dropdown menu currently set to "Date".
- Date:** Radio button options for "1 day", "3 days", "7 days", "14 days", and "All" (which is selected).
- Show Unread Notes:** An unchecked checkbox.
- Tags:** A section labeled "No tags" with a "Reset" button.
- Authors:** A section with a checked checkbox next to "Stephen Billias (you)".

Below the filter menu, the text "2 / 2 notes shown" is displayed. A dropdown arrow indicates that the notes are grouped by date, showing "February 23 (2 notes)". Two note cards are visible:

- Note 1: "Stephen Billias (You) → All Viewers, Yesterday 08:13 AM" with the content "Fix date" and "page 1".
- Note 2: "Stephen Billias (You) → All Viewers, Yesterday 08:13 AM" with the content "Should be 2022" and "page 1".

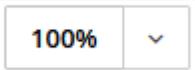
Thumbnails

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



Sizing icons

The review space provides these additional navigation tools:

- The plus or minus looking-glass icons   increase or decrease the display of the annotations area.
- The sizing dropdown  gives you a set of choices for resizing the annotations area
- The vertical double-arrow  positions the entire annotations area vertically as a single page

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

Complete review

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

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

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

Confirm Commit Changes ✕

WARNING!

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

Please enter review task time:

h m

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

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.

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:

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	<input type="checkbox"/>

Tasks - Completed Reviews

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:

Please confirm ✕

Are you SURE you want to complete this task?

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

Set Actual Hours ✕

Hours *
1

Minutes *
0

Ok Cancel

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

Review Tasks

▼ Tasks - Active Reviews

Template	Review Round	Name	Start Date	End Date	Edit Method
SBTemplate50919	1	Review sample EOC	5/9/2019	5/30/2019	  