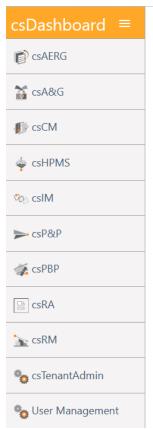
System Administration

csTenantAdmin dashboard

After logging in, the System Administrators can manage non-user related content by clicking on **csTenantAdmin** on the lefthand side. Note your selections may vary depending on your permissions:





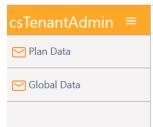
Welcome to csDashboard.

The Dashboard module

Please use the left menu to navigate through the app.

Users are then presented with 2 selections on the lefthand side, Plan Data and Global Data:





Welcome to csTenantAdmin

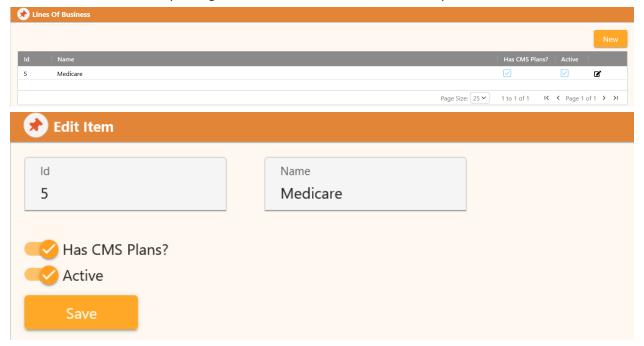
The TenantAdmin module

Please use the left menu to navigate through the app.

Global Data

Select **Global Data** and you will be presented with the following section tabs:

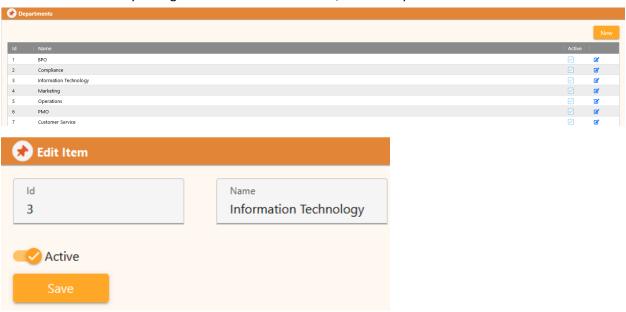
- 1. Lines of Business
 - Click New to add a new Line of Business or click the icon to edit an existing. The Id
 field is system generated and is not fillable/editable by users.



 Note – you must flag 'Has CMS Plans?' toggle for plans within the Medicare Line of Business

2. Departments

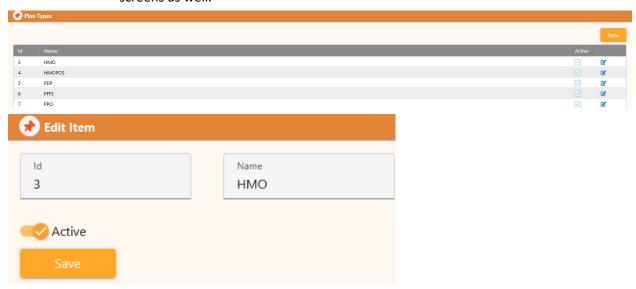
• Click New to add a new Department or click the is icon to edit an existing. The Id field is system generated and is not fillable/editable by users.



- 3. Plan Types
 - Click New to add a new Plan Type or click the **☑** icon to edit an existing. The Id field is

system generated and is not fillable/editable by users.

 Note: Plan Types will be selectable in a dropdown in the Sub Plan Type New/Edit screens as well.



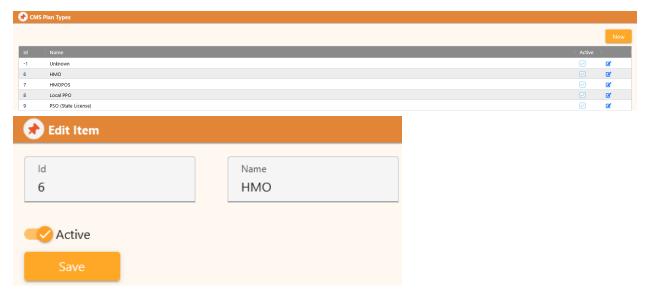
- 4. Plan Sub Types
 - Click New to add a new Plan Sub Type or click the icon to edit an existing. The Id field is system generated and is not fillable/editable by users.



 Note: Sub Type must be linked to a Plan Type by selecting one from the Plan Type Dropdown

5. CMS Plan Types

• To activate or inactivate a CMS Plan Type, click the icon to edit an existing, and toggle the Active button. The Id field is system generated and is not fillable/editable by users.



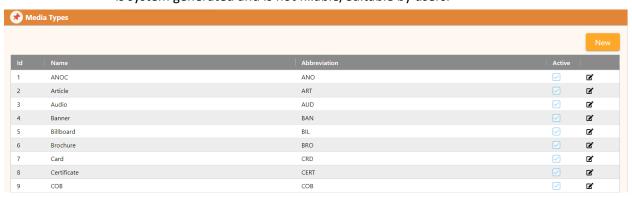
6. SNP Types

To activate or inactivate a SNP Type, click the icon to edit an existing, and toggle
the Active button. The Id field is system generated and is not fillable/editable by
users.



7. Media Types

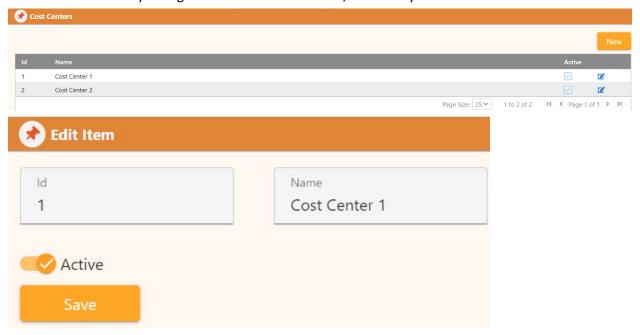
• Click New to add a new Media Type or click the icon to edit an existing. The Id field is system generated and is not fillable/editable by users.





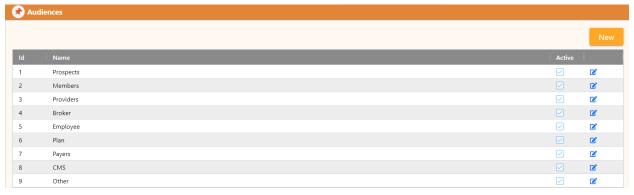
8. Cost Centers

• Click New to add a new Cost Center or click the is icon to edit an existing. The Id field is system generated and is not fillable/editable by users.



9. Audiences

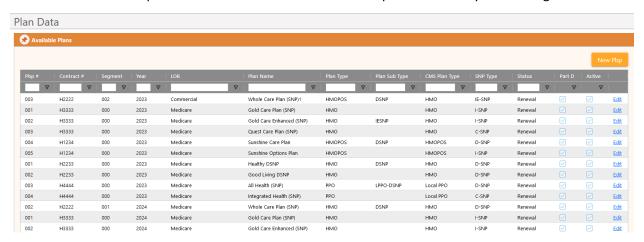
• Click New to add a new Audience or click the is icon to edit an existing. The Id field is system generated and is not fillable/editable by users.





Plan Data

Select **Plan Data** and you will be presented with the following table showing all plans. Note: Users can use the boxes at the top of each column to filter down to the specific data they are looking for.



Click New Pbp to add a new plan or click Edit on the row of the plan you wish to edit to edit an existing. Fields in red below are required. Note: the values in each of the dropdowns are populated with the data entered in **Global Data** screens shown earlier in the guide.



Notes:

- CMS Plan Type is applicable only for plans with the Medicare Line of Business; when another Line of Business is selected that field goes away.
- SNP Type is required/applicable only for Medicare plans.
- Part D toggle button is required/applicable only for Medicare plans.
- Segment is auto populated with zero(s) based on your tenant settings, user can edit that if a non-zero segment number applies.
- When 'Crosswalk' is selected as Plan Status, user is required to select the plan it is Cross walked to.

To return to the previous screen from here, click Dashboard in the top right corner under your name:

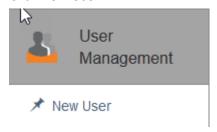
Cory Belden

<u>Dashboard Help Logout</u>

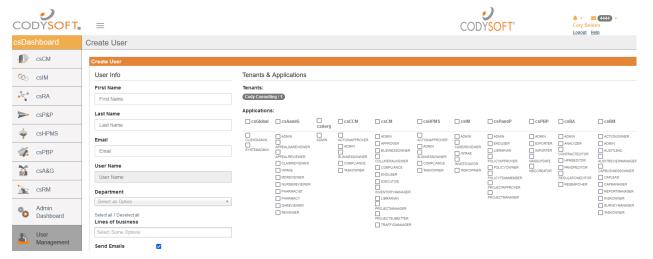
User Management

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

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



The Create User dialog box opens.



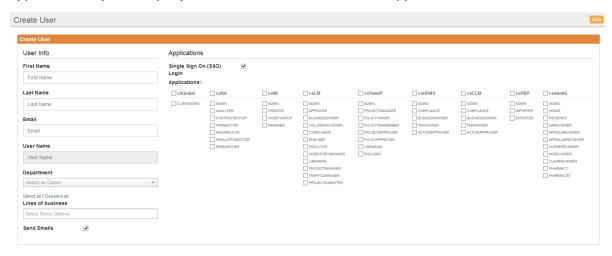
- 3. In the **User Info** section, enter information about the new user in the following fields:
 - a. First Name
 - b. Last Name
 - c. **Email**—Add user's complete email address, including @ information
 - d. User Name-This field is auto-filled with the user's email address as the name
 - e. **Department**–Select 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.

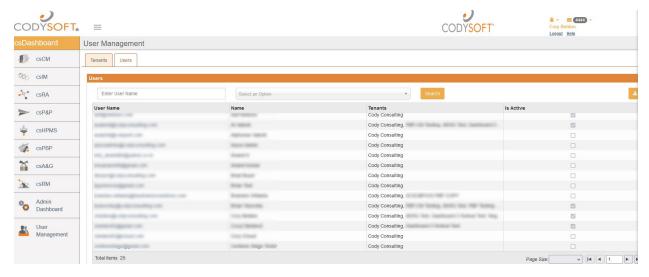
User Role	Description
Admin	The admin has client administrative rights. This user can set client-specific values for the configurable fields within the module.
All Permissions	This user has all permissions except admin rights. These permissions include compliance permissions. This is the most broad-based permission group available.

User Role	Description
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.
*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.
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.

To return to the Admin Dashboard from here click Admin Dashboard on the left-hand side:

