CodySoft February 13th 2020 release notes:

Collateral Management Module:

1. Introduction of the Rules Wizard, which allows users to create an entire set of new rules automatically from a Published CodySoft Rules Grid.
   a. The Rules Wizard presents a simple way for users to bulk create hundreds of new rules, optionally including a prefix and/or suffix for each in just a few clicks.

   b. Validations ensure only new unique rules are created

2. Bulk change of Version Status
   a. When selecting one or more version you are now able to change version status on all selected Versions

HPMS Memo Module:

1. Introduction of Secondary Memo and Correspondence Owner assignment
   a. The assigned Secondary Owner can do everything the Primary Owner can do to the Memo or Correspondence they are assigned to, in addition to the associated Actions and Tasks

2. Users in the Admin role can now change the Primary Memo or Correspondence Owner, and Secondary Memo or Correspondence Owner without being assigned to those records

3. Memos and correspondences visible to only Compliance roles, and assigned Action Owners
   a. Below represents the view of a user in the Action Owner, and Task Owner roles. Only Memos and Tasks related to their assigned Actions are visible

Dashboard

| Actions | My Tasks |

Search

Parent Type	Parent #	Action # ✔
Parent Typ ▼	Parent # ▼	Action # ▼
memos	10050	5249
memos	9985	5219
correspondences	609	4065

   b. Below represents the view of a user in the Task Owner role. Only Actions related to their assigned Tasks are visible

Dashboard

| My Tasks |

Search

Task Id
Task Id ▼
HPMS.memos.9985.5219
HPMS.memos.9985.5220