

CodySoft May 28th 2020 release notes:

Collateral Management Module:

1. Ability to add or Remove Reviewers to an in-progress Review
 - a. From the Template Review Summary screen, click Update Assigned Reviewers:

The screenshot shows the Collateral Management Module interface. At the top right, it says "Welcome Stephen Billias" with links for "Admin", "Help", and "Logoff". There are notification icons for a bell and a message with "866". A search bar labeled "Search Projects" is present. The navigation menu includes "Home", "Projects", "Rules", "Library", "Inventory", "Reports", "Archives", "Search Regulatory Rules", and "Admin". Below the menu, there are links for "New Project", "Projects", "Schedule Templates", "New Schedule Template", and "Search Projects".

Template Review Summary - NewMCETestTemplate - Base Template

[Return to Project](#)

Task	# of Assigned Reviewers
Test Add Assignee	2

Reviewers by Task

Test Add Assignee

Assigned Reviewer	Status
Stephen Billias	Task In Progress
Stephen2 Billias2	Task In Progress

[Update Assigned Reviewers](#)

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

The dialog box titled "Update Reviewers" has a close button (X) in the top right corner. It contains a label "Assigned To" followed by a dropdown menu showing "2 selected". Below the dropdown is a button labeled "Update Assigned Reviewers".

Close

2. Auto update of Table of Contents (TOC) to Versions

- a. When editing a Word format version, the TOC now updates after saving and closing (causing a reparse). Any changes that cause content to move pages will be handled in this auto-update.
- b. These changes are also reflected when you select 'Convert to PDF' or 'Both' in the Download selected document(s) dropdown:

