

**M&M Micro Systems, Inc.**

**iSOMS**

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# **Policies & Procedures**

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## Policies & Procedures

**Purpose:** To track all policy, procedures, and general orders along with revisions. There are 2 parts to the Policy and Procedure Module

1. Create the Policies/Revisions to upload into iSoms
2. Notify employees of New Policies or revisions and track employee acknowledgements.

The screenshot shows the iSOMS 'YOUR AGENCY' dashboard. On the left is a navigation menu with options: Communications, Mobile, Property, Admin, and Agency. The 'Agency' menu is expanded, showing sub-options like Accounts Payable, Checks Written, Company Setup, Legal Case Tracking, Material Safety Data Sheets, Outside/Non-Employee Accounts, and Policy / General Orders. The main content area displays a notification titled '1 Employee Notification' with a table containing one row of data. Below the table, a blue banner repeats the notification message.

Entry Date	Entry By	Effective Until	Reason	Title	Cleared By	Cleared Date	Notes
08/23/2010 09:24	ELDER, MARTIN						There will be a WinSOMS update this wednesday at 0800 for 30 minutes.

In the main menu choose Agency, Policy/General Orders.

This will bring you to the search screen. From this screen you can search for Policies already in your system or you can click on New Policy in the top right-hand corner.

The screenshot shows the 'Policy: Search' screen in the iSOMS system. It features a header with a hamburger menu, the text 'YOUR AGENCY', and search icons. Below the header are buttons for 'NEW POLICY', 'AUDITS', 'TOPICS', 'REPORTS', and 'MAINTAIN FILES'. A row of filter buttons includes 'ALL ACTIVE RECORDS', 'ALL IN-ACTIVE RECORDS', 'UPDATED LAST 30 DAYS', 'PUBLISHED LAST 60 DAYS', 'ACTIVATED IN LAST 60 DAYS', and 'TO BECOME ACTIVE AFTER TODAY'. The search form includes fields for 'Active Dates From', 'Active Dates Through', and a checkbox for 'Include In-Active'. Below these are fields for 'Policy Title', 'Policy Number', 'Policy Chapter', 'Violation Code', and 'Policy Keyword'. A 'Policy Type' dropdown menu is also present. At the bottom, there is a checkbox for 'Show Archived Only' and two buttons: 'LOOKUP' and 'CLEAR FILTER'.

## TO ADD A NEW POLICY OR GENERAL ORDER

**YOUR AGENCY**

Policy: Search

**NEW POLICY** AUDITS TOPICS REPORTS MAINTAIN FILES

ALL ACTIVE RECORDS ALL IN-ACTIVE RECORDS UPDATED LAST 30 DAYS PUBLISHED LAST 60 DAYS ACTIVATED IN LAST 60 DAYS TO BECOME ACTIVE AFTER TODAY

Active Dates From:  Active Dates Through:  ☐ Include In-Active

Policy Title:  Policy Number:

Policy Chapter:  Violation Code:  Policy Keyword:

Policy Type:

☐ Show Archived Only

LOOKUP CLEAR FILTER

This is where you will add the new Policy Information

Active/inactive Dates, Last published date

Policy Type: Dept, General Order, Regulation, etc.

Policy # Chapter: Paragraph Section

Title:

Violation Code:

**YOUR AGENCY**

Policy: View Record

LOOKUP **NEW POLICY** AUDITS TOPICS REPORTS MAINTAIN FILES

<< FIRST < PRIOR NEXT > LAST >> SAVE DELETE

Active Date:  In-Active Date:  Last Published Date:

Policy Type:

Policy #:  Chapter:  Paragraph:  Section:

Title:

DESCRIPTION

Violation Code:

Revisions Notes Images Attachments

0 Revisions

EXPORT GRID TO FILE ADD REVISION

No Revisions.

The policy can be viewed at any time by choosing the attachments file and click on View. (This will download it for Chrome it will be in the bottom left corner of your screen) From here you can save, view or print it.

## ADDING REVISIONS

To add a revision to a current Policy, choose the policy from the lookup grid.

Click on Add Revision Button just above the grid. Type in Original Name, Revised to and add Summary notes if needed.

Next Click on Add Notifications

Notification Days - Default 7 days. *(this can be adjusted in Company Setup under Settings, Policy History, double click on default days that the employee has to acknowledge notification.)*

Choose Employment Type - All, Full-Time, Part-Time (all for everyone)

Sworn - All, Yes, No - All for all Sworn Officers

Choose Major/Minor/Shift if it needs to go to a particular group of employees.

Officer - Choose Officer it is to be acknowledged by one particular employee.

Revision			

**\*\*** If the Revision has already been created, you can double click on the revision in the grid. (if the revision is long you may have to scroll down to see the date and additional information, this is where you will double click to open it) Once it is open scroll down to see the area for notifications.

To check employee acknowledgements, go to Reports, these reports will show when notified and when it was accepted.

Print Notification History or

Print Employee Notification History