

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

# iSOMS

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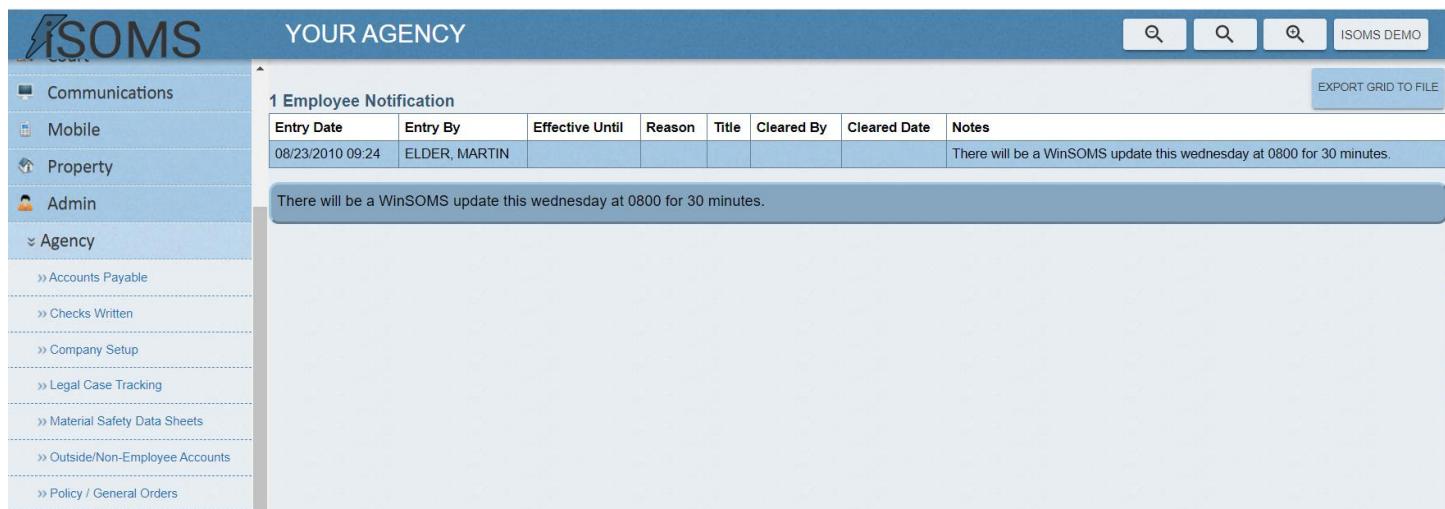
## Policies & Procedures

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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

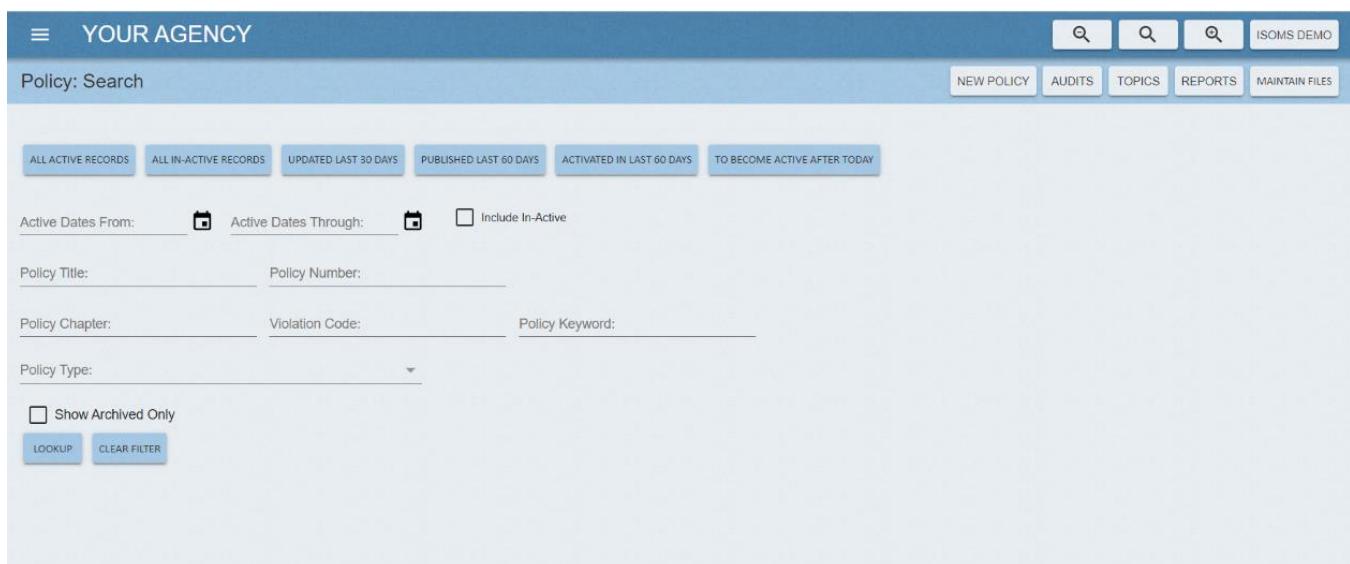
1. Create the Policies/Revisions to upload into iSoms
2. Notify employees of New Policies or revisions and track employee acknowledgements.



The screenshot shows the iSOMS main menu. On the left, a sidebar lists categories: Communications, Mobile, Property, Admin, and Agency (with sub-options: 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 is titled '1 Employee Notification' and displays a table with one row. The table columns are: Entry Date, Entry By, Effective Until, Reason, Title, Cleared By, Cleared Date, and Notes. The data in the table is: 08/23/2010 09:24, ELDER, MARTIN, (empty), (empty), (empty), (empty), There will be a WinSOMS update this wednesday at 0800 for 30 minutes. At the top right of the main area are three search icons and a 'ISOMS DEMO' button. At the bottom right is a 'EXPORT GRID TO FILE' button.

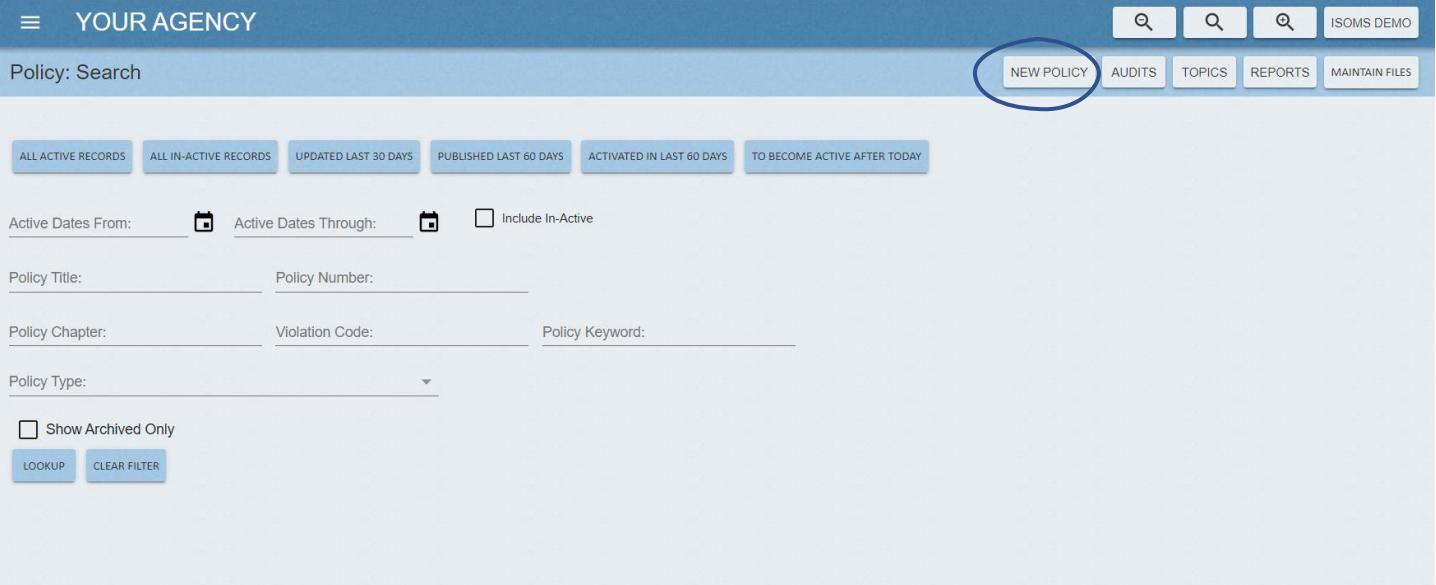
In the main menu choose Agency, Policy/General Orders.

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. At the top, there are search icons and buttons for 'NEW POLICY', 'AUDITS', 'TOPICS', 'REPORTS', and 'MAINTAIN FILES'. Below the search bar are several filter buttons: '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'. There are also date input fields for 'Active Dates From' and 'Active Dates Through', and a checkbox for 'Include In-Active'. Below these are input fields for 'Policy Title', 'Policy Number', 'Policy Chapter', 'Violation Code', 'Policy Keyword', and 'Policy Type'. At the bottom left are 'LOOKUP' and 'CLEAR FILTER' buttons.

## 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

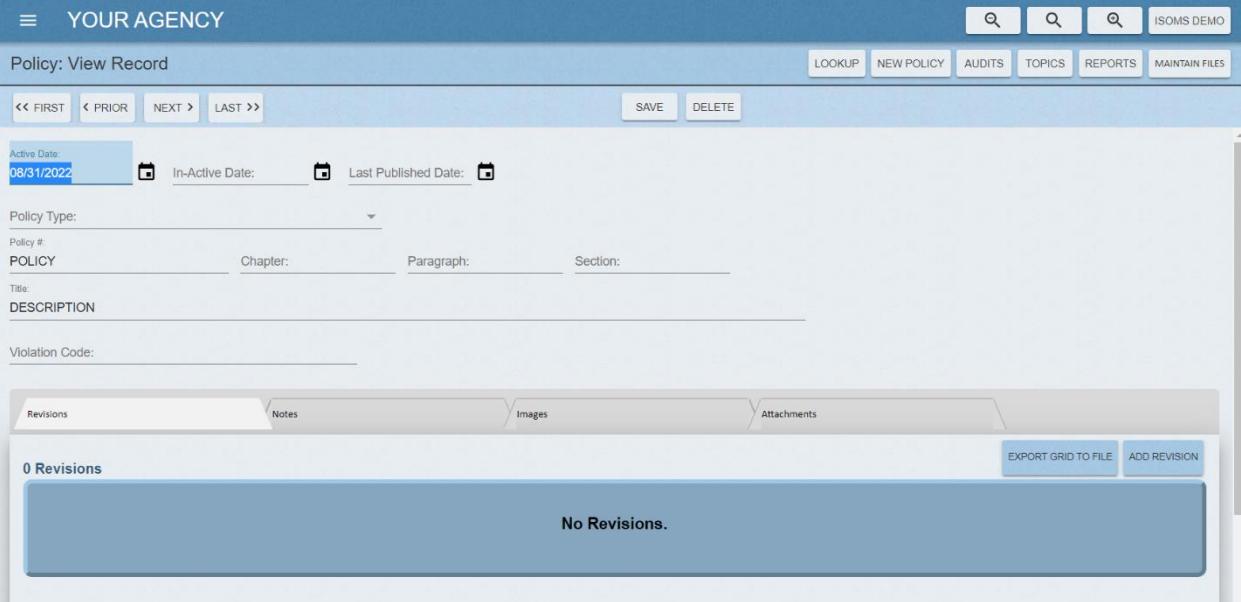
Active/inactive Dates, Last published date

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

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

SAVE DELETE

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	Date			

\*\* 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