



MGS Policy and Procedure Management for Creatio

User guide

Contents

Chapter 1 : MGS Policy and Procedure Management for Creatio - Login	3
Chapter 2 : MGS Policy and Procedure Management for Creatio – Home Page.....	4
2.1 MGS Policy and Procedure Management for Creatio - Home Page:	6
Chapter 3: MGS Policy and Procedure Management for Creatio - Standard Management:.....	6
3.1 General Information tab.....	7
3.2 Content tab	8
• Measurable Element General Info:	10
• Measurable Element Responsible Units:	11
• Measurable Element Evidences:	11
Chapter 4: MGS Policy and Procedure Management for Creatio - Quality Documentation	14
Chapter 5: MGS Policy and Procedure Management for Creatio – Dashboard	19

Chapter 1 : MGS Policy and Procedure Management for Creatio - Login

1. Log in to the system and enter your username and password.

Creatio QUANTUM

Username

Enter a value

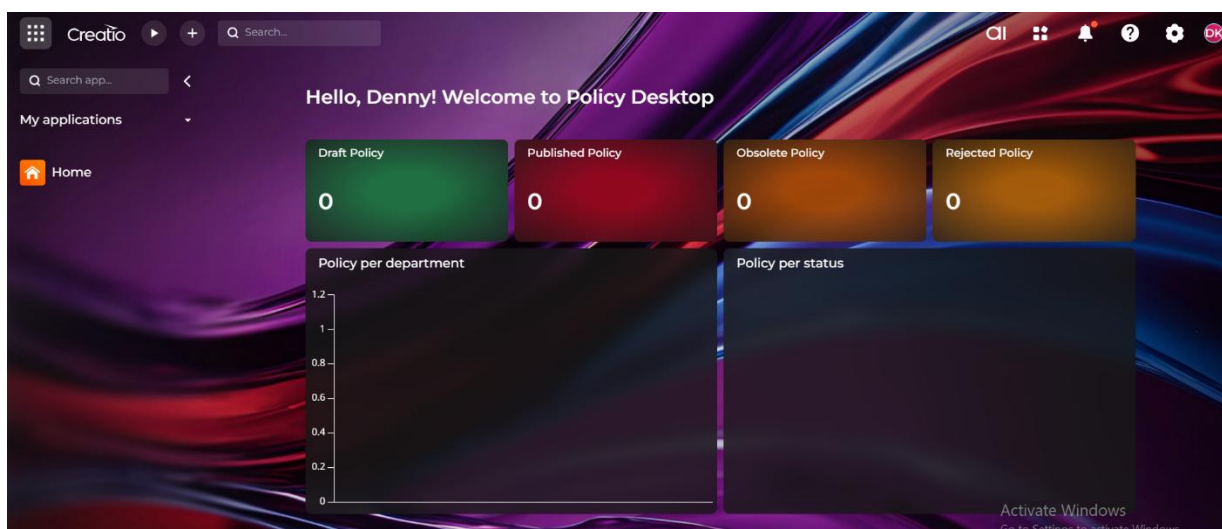
Password

Enter a value

LOG IN

Version 8.1.2.3842

2. On the Desktop Page, you will find a summary of all metadata related to the Policy and Procedure system.

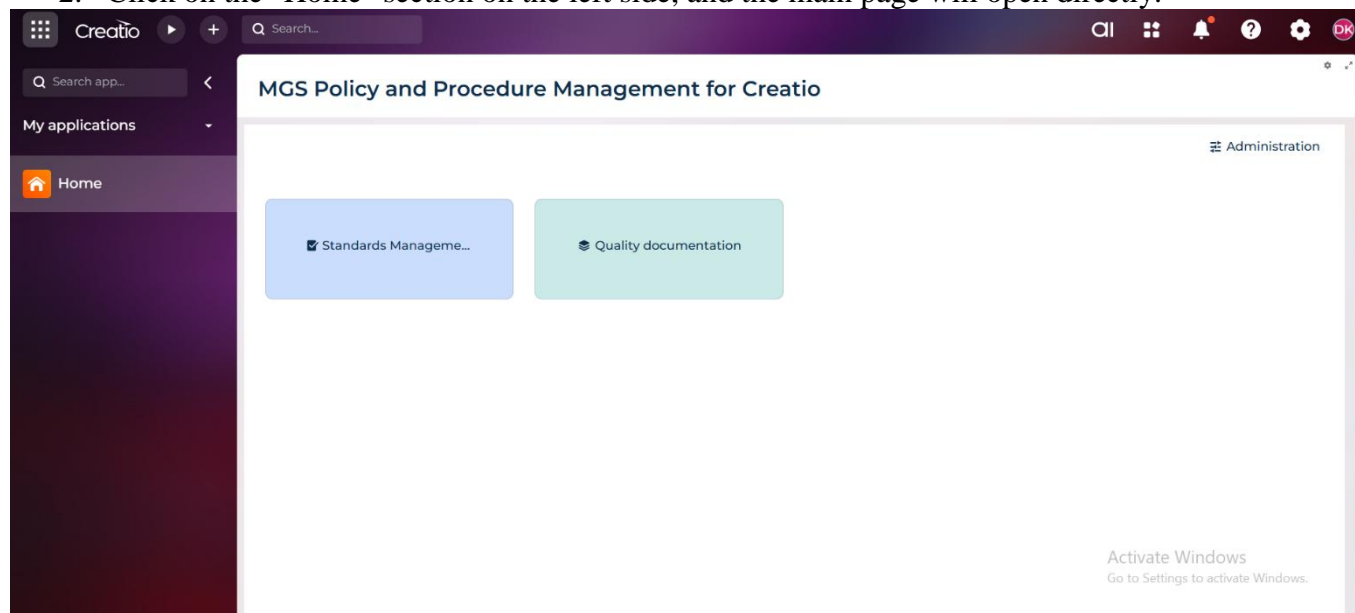


Chapter 2 : MGS Policy and Procedure Management for Creatio – Home Page

1. In the top left corner of the page, click the navigation panel to go to "My Applications," where you will find the "Home" section.

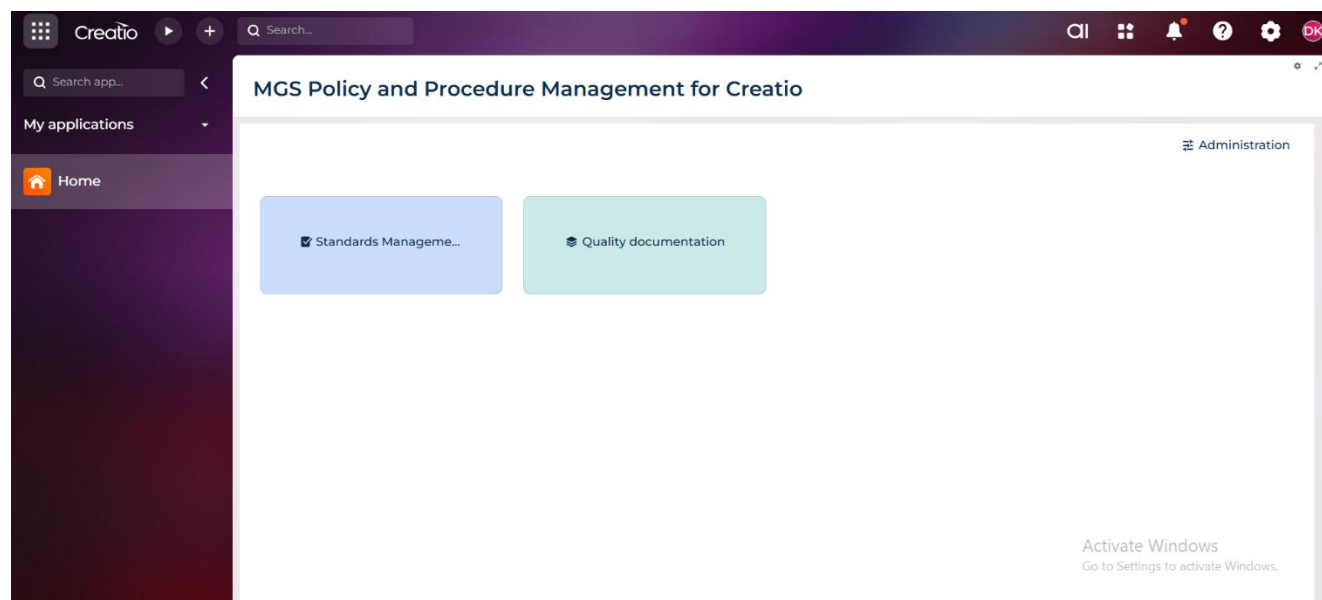


2. Click on the "Home" section on the left side, and the main page will open directly.



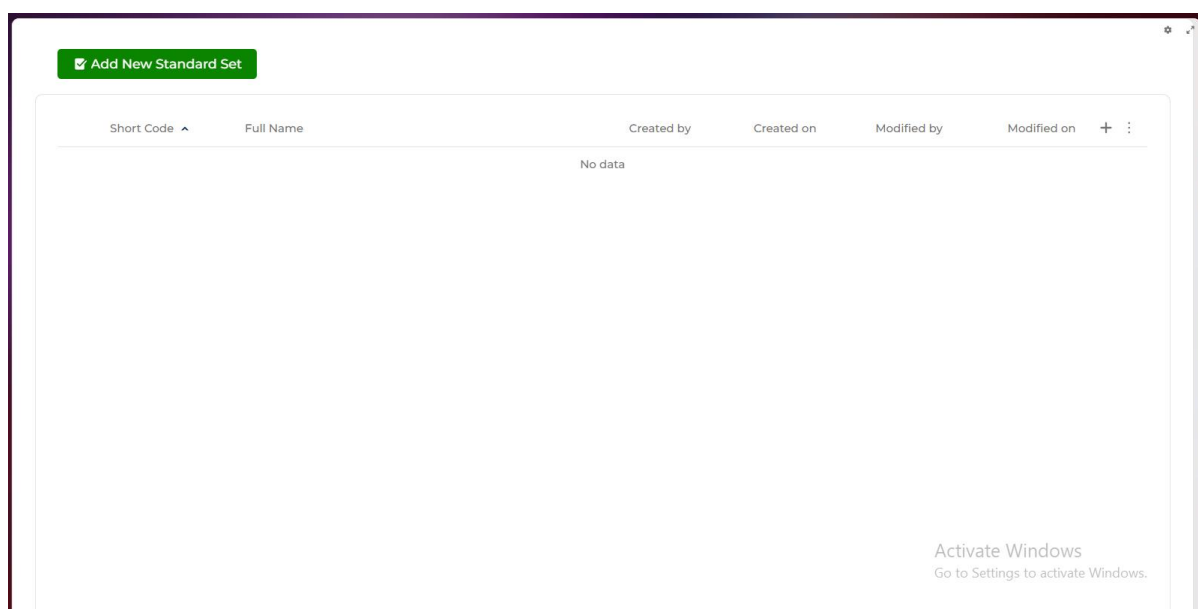
2.1 MGS Policy and Procedure Management for Creatio - Home Page:

From the home page of MGS Policy and Procedure Management for Creatio, you will find two folders one for “Standard Management” and “Quality Documentation”.

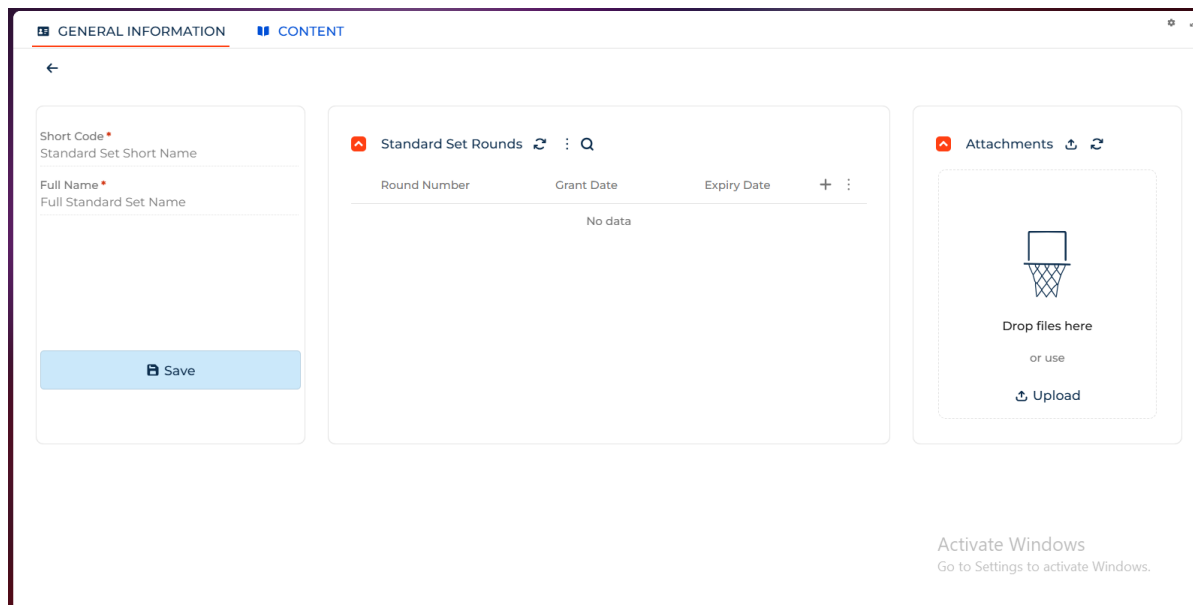


Chapter 3: MGS Policy and Procedure Management for Creatio - Standard Management:

1. To create a new standard, click on the "Add New Standard Set" button located on the Left side.

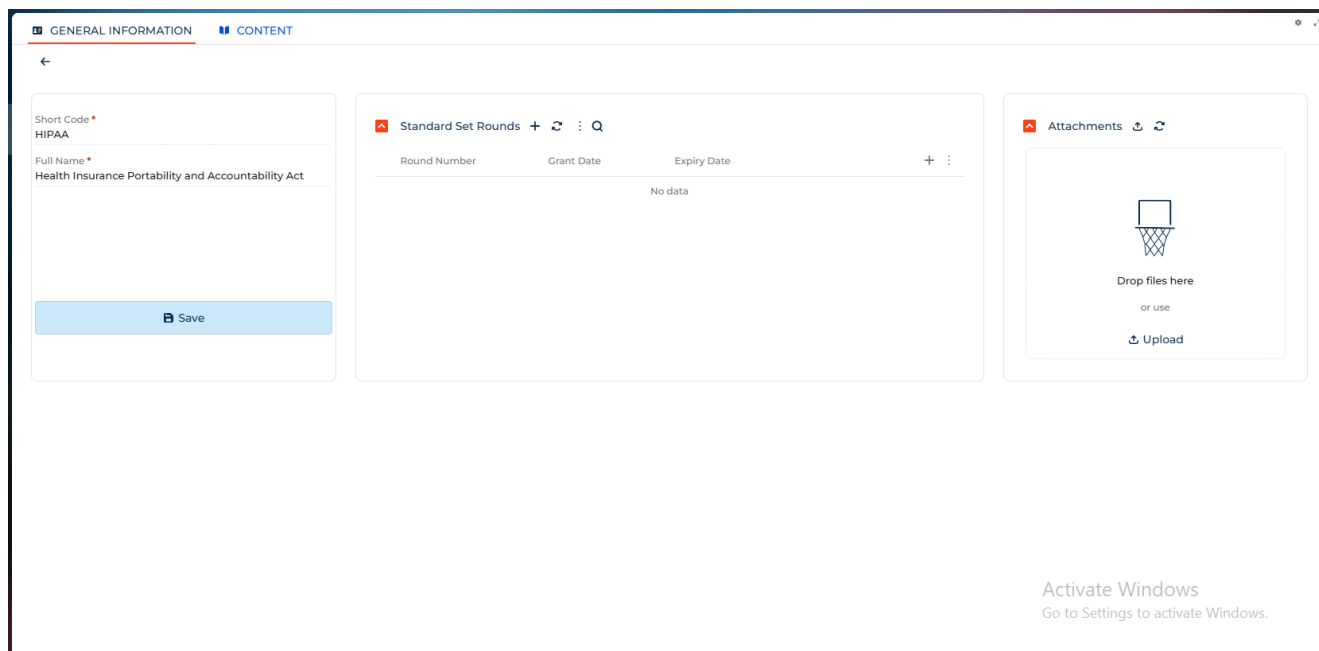


1. A new page will open, you can then start filling in the metadata for this standard.



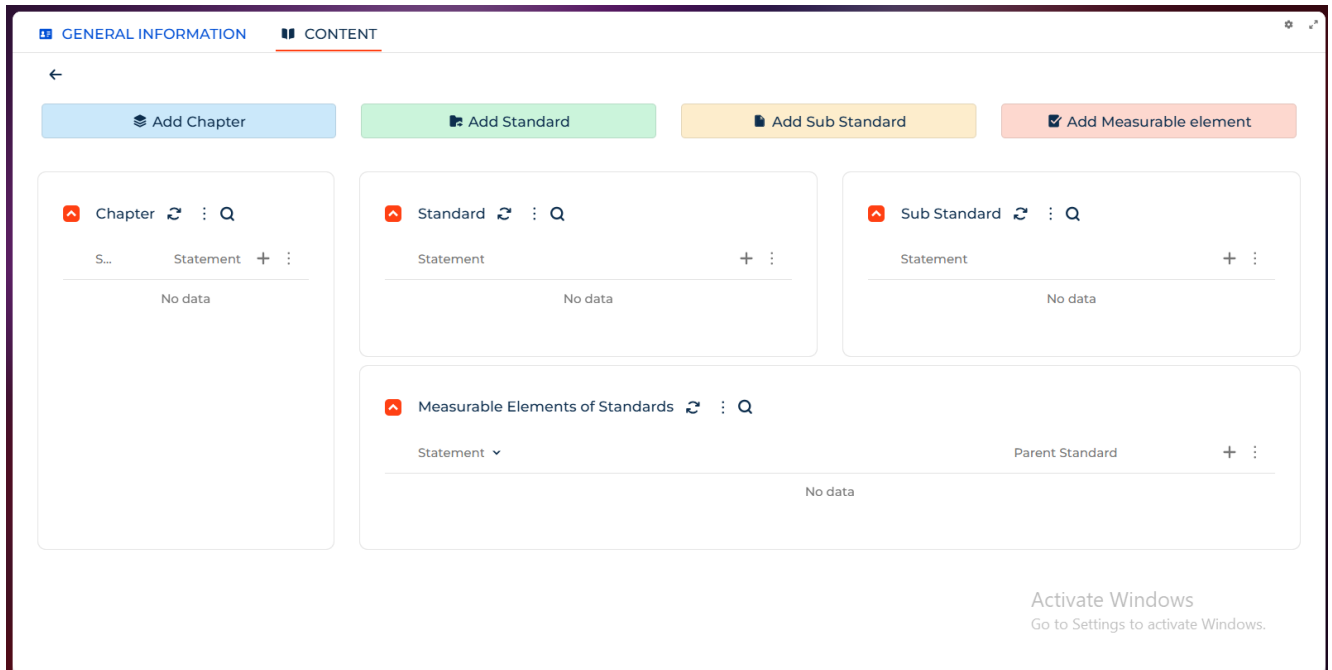
3.1 General Information tab

2. In the General Information tab, enter the standard code and full name, then click Save.
3. After saving, start adding the standard set rounds and attachments if needed.

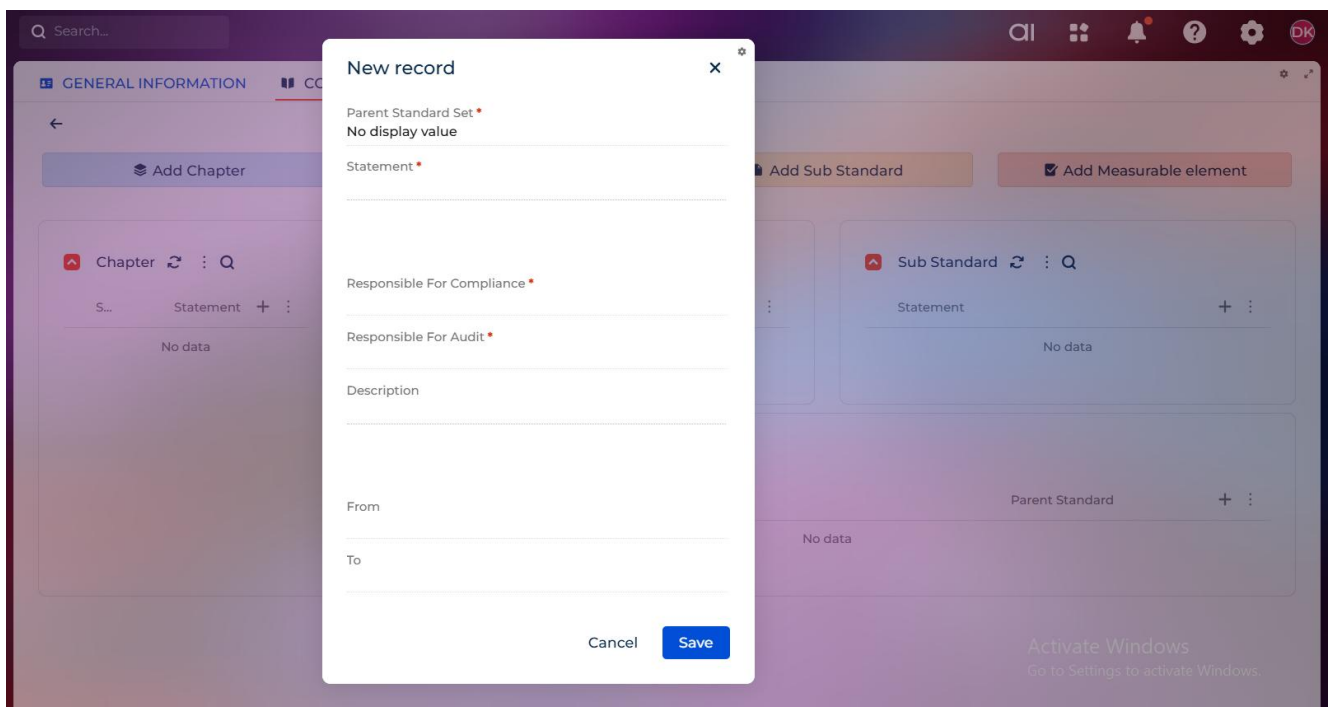


3.2 Content tab

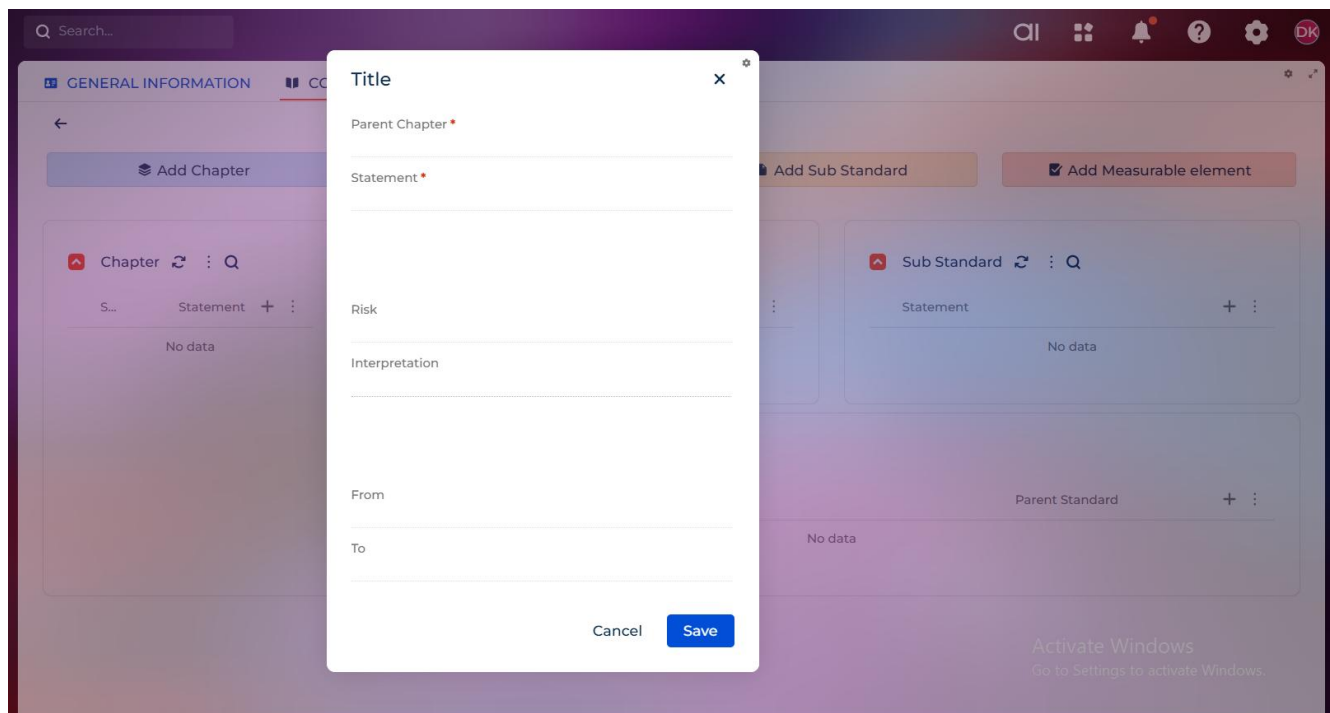
- In the Content tab, you can add chapters, standards, sub-standards, and measurable elements.



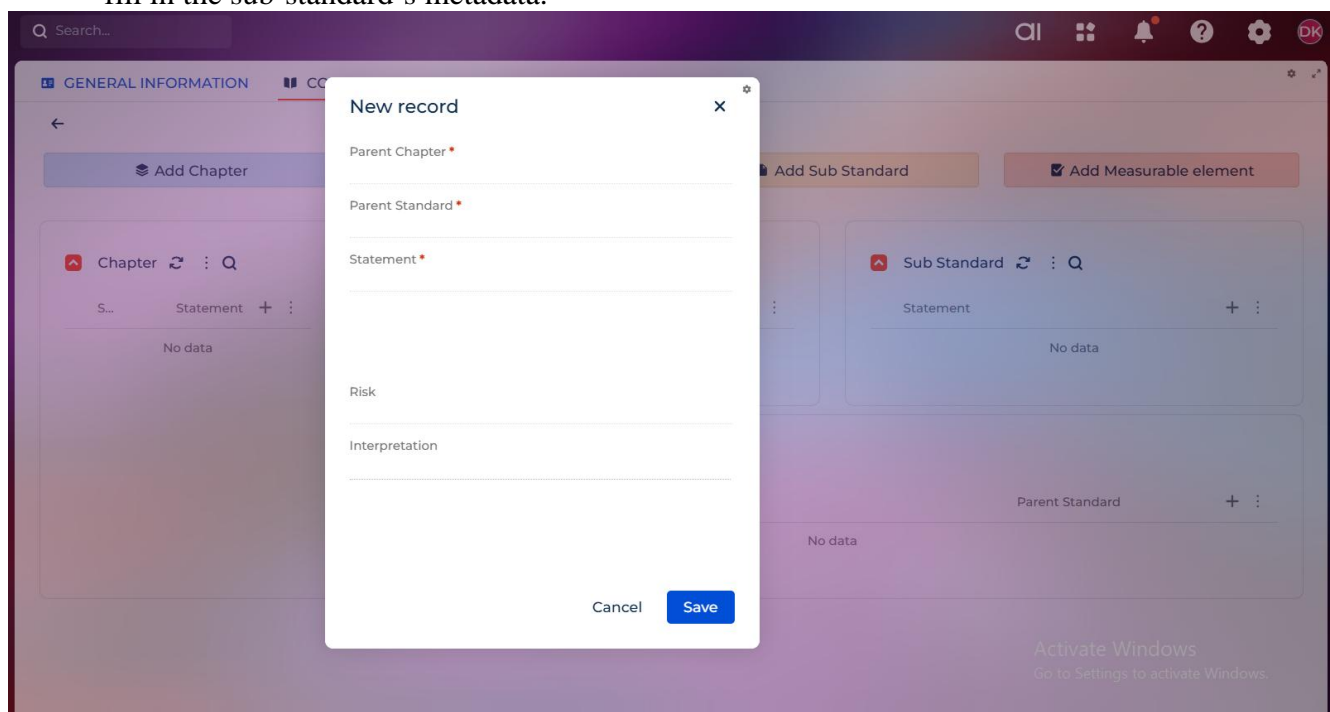
- To add a chapter, click the 'Add Chapter' button. A mini page will appear, where you can fill in the chapter's metadata.



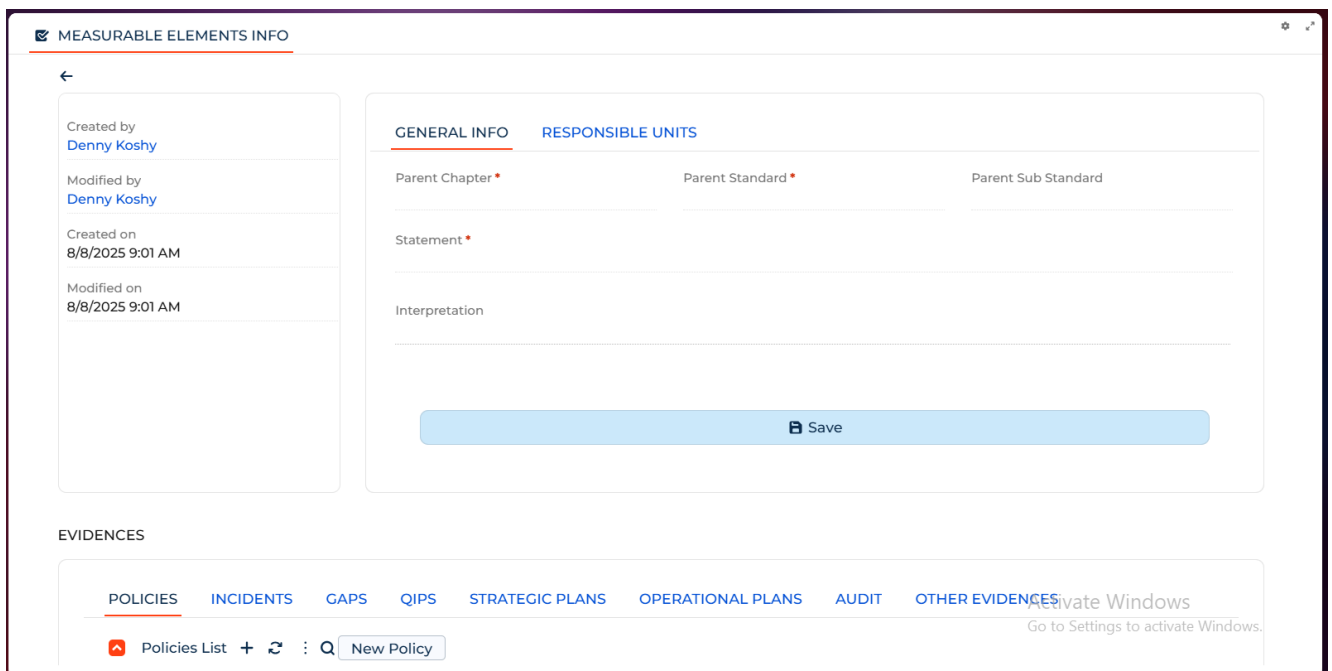
- To add a chapter, click the 'Add Standard' button. A mini page will appear, where you can fill in the Standard's metadata.



- To add a chapter, click the 'Add Sub-Standard' button. A mini page will appear, where you can fill in the sub-standard's metadata.

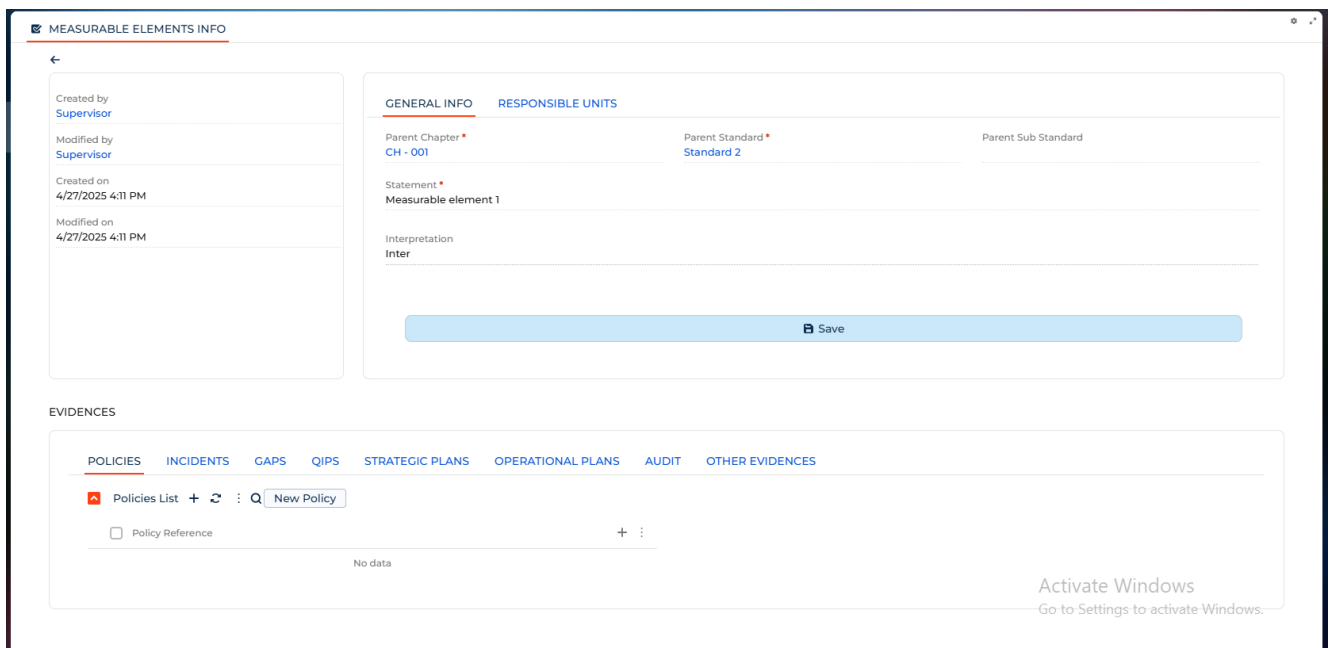


8. To add a chapter, click the 'Add Measurable Element' button. A page will appear, where you can fill in the chapter's metadata.



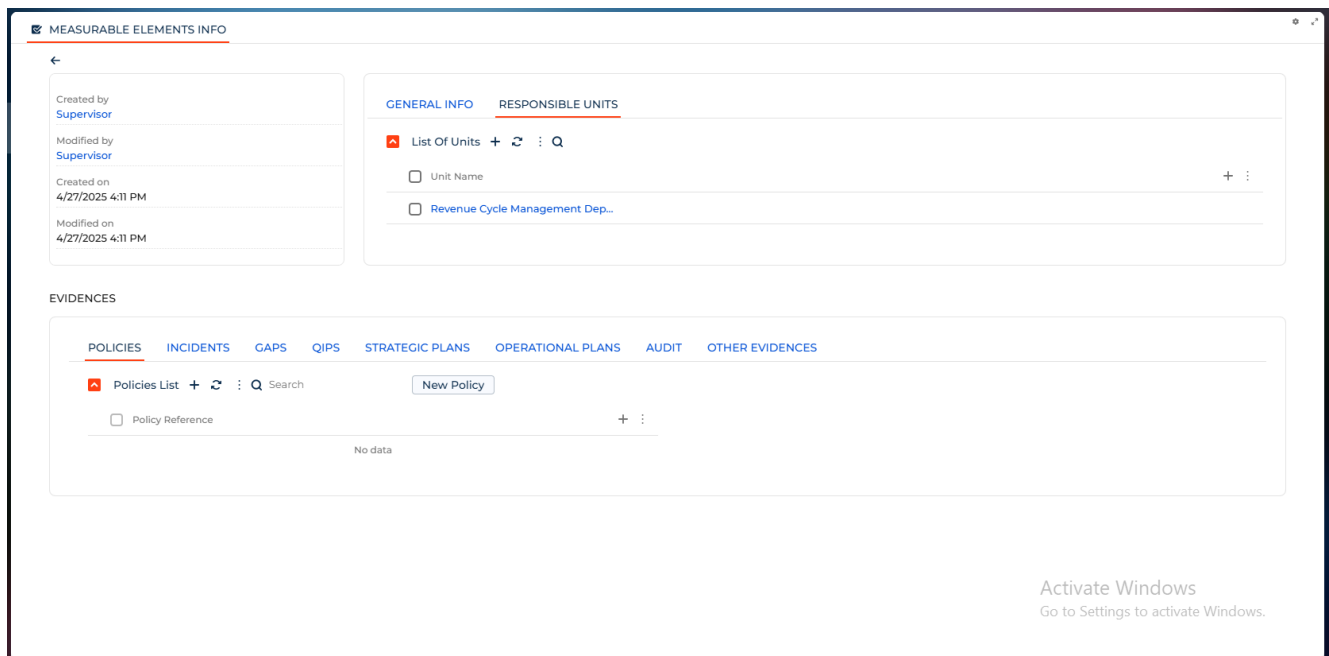
- Measurable Element General Info:

9. In the General Info section, link the created measurable to its parent chapter, parent standard, and parent sub-standard (if applicable). Enter its statement and interpretation, then click Save.



- Measurable Element Responsible Units:

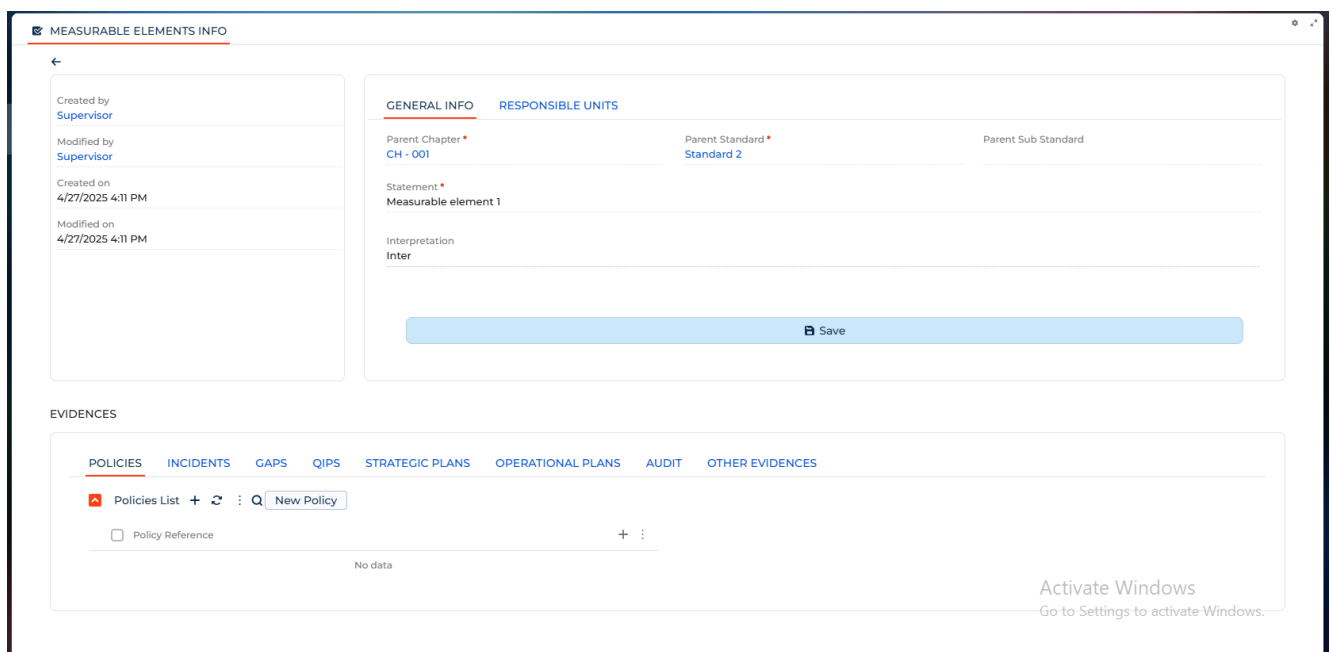
10. In the Responsible Units section, link the created measurable to the list of related units.



The screenshot shows the 'MEASURABLE ELEMENTS INFO' form. On the left, there is a sidebar with metadata: 'Created by Supervisor', 'Modified by Supervisor', 'Created on 4/27/2025 4:11 PM', and 'Modified on 4/27/2025 4:11 PM'. The main content area has two tabs: 'GENERAL INFO' and 'RESPONSIBLE UNITS'. The 'RESPONSIBLE UNITS' tab is active, showing a 'List Of Units' section with a search icon and a list of units. The first unit is 'Unit Name' and the second is 'Revenue Cycle Management Dep...'. Below this, there is an 'EVIDENCES' section with tabs for 'POLICIES', 'INCIDENTS', 'GAPS', 'QIPS', 'STRATEGIC PLANS', 'OPERATIONAL PLANS', 'AUDIT', and 'OTHER EVIDENCES'. The 'POLICIES' tab is active, showing a 'Policies List' with a search icon and a 'New Policy' button. The 'Policies List' is currently empty, showing 'No data'.

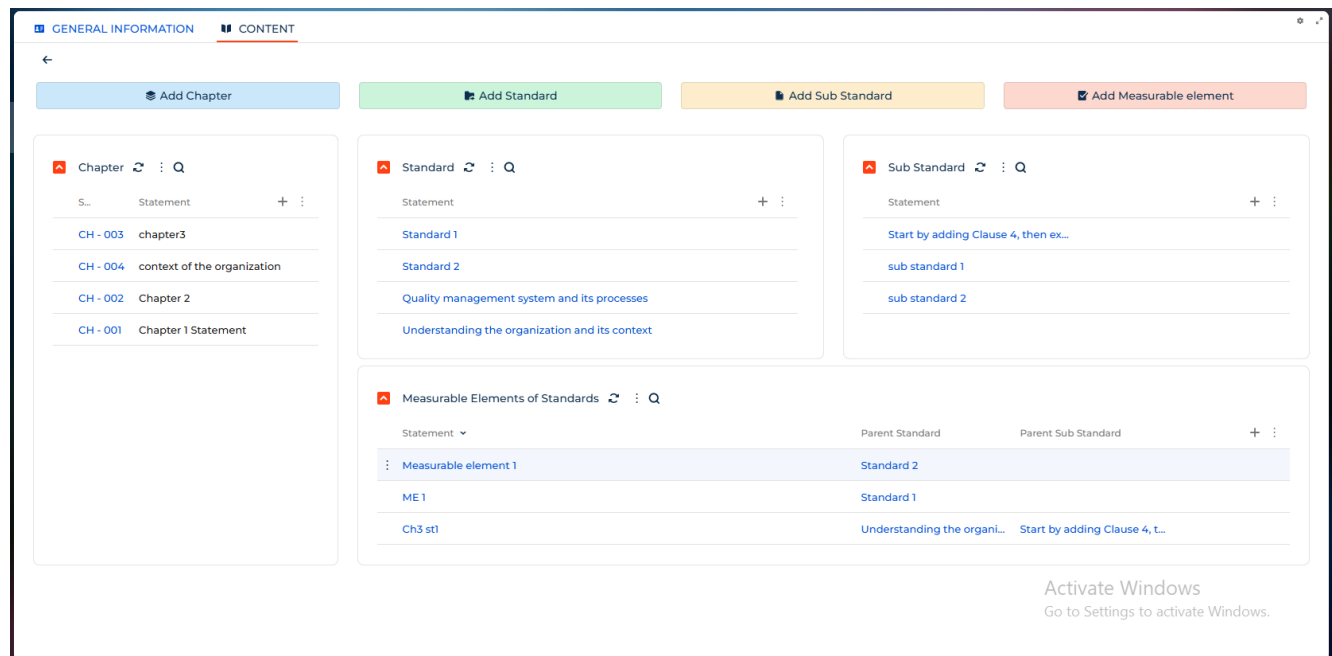
- Measurable Element Evidences:

11. In the Evidences section, add the relevant evidences to the created measurable.

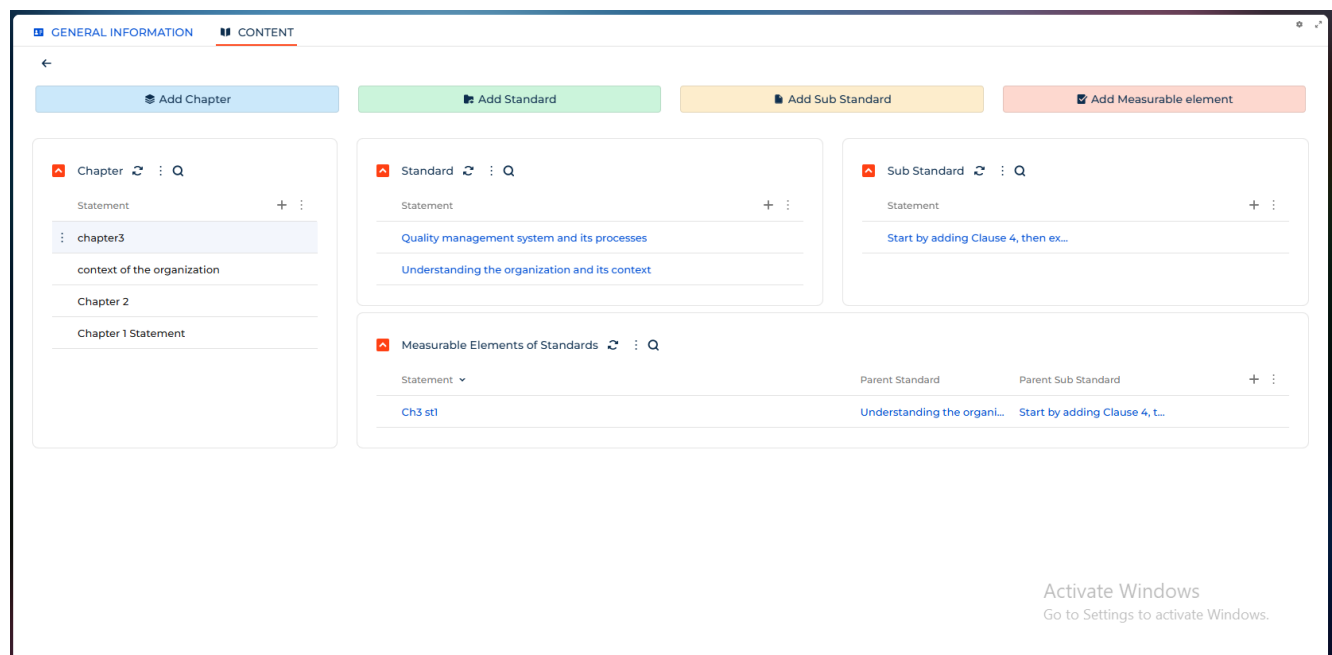


The screenshot shows the 'MEASURABLE ELEMENTS INFO' form. On the left, there is a sidebar with metadata: 'Created by Supervisor', 'Modified by Supervisor', 'Created on 4/27/2025 4:11 PM', and 'Modified on 4/27/2025 4:11 PM'. The main content area has two tabs: 'GENERAL INFO' and 'RESPONSIBLE UNITS'. The 'GENERAL INFO' tab is active, showing fields for 'Parent Chapter' (CH - 001), 'Parent Standard' (Standard 2), 'Parent Sub Standard', 'Statement' (Measurable element 1), and 'Interpretation' (Inter). Below these fields is a 'Save' button. Below the 'GENERAL INFO' section, there is an 'EVIDENCES' section with tabs for 'POLICIES', 'INCIDENTS', 'GAPS', 'QIPS', 'STRATEGIC PLANS', 'OPERATIONAL PLANS', 'AUDIT', and 'OTHER EVIDENCES'. The 'POLICIES' tab is active, showing a 'Policies List' with a search icon and a 'New Policy' button. The 'Policies List' is currently empty, showing 'No data'.

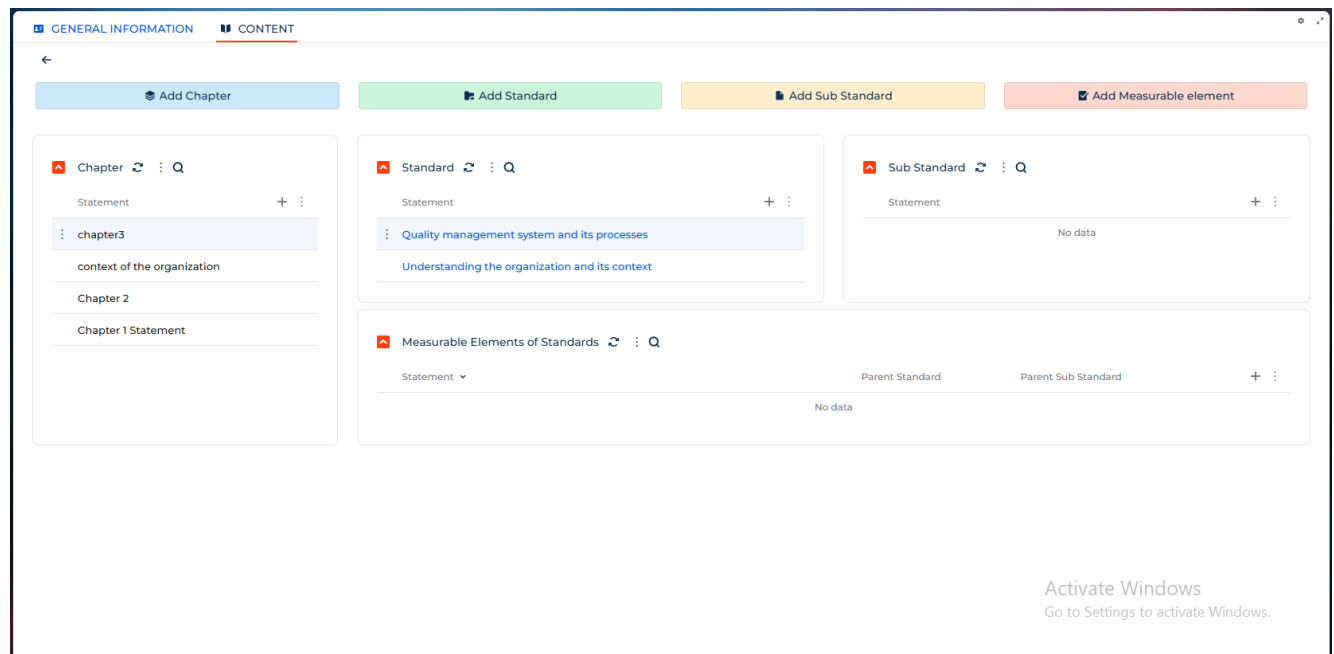
12. All created content will be displayed in the 'Content' tab of the page.



13. When you highlight a chapter, all its related items will be displayed accordingly.

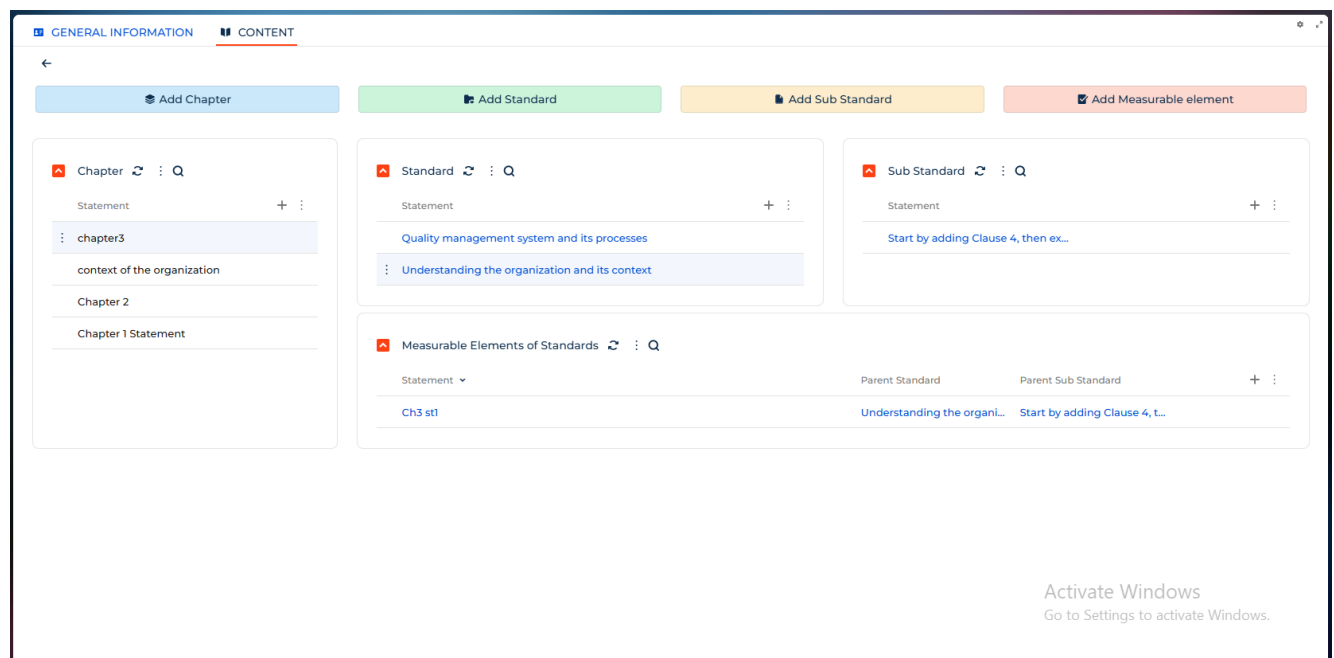


14. When you highlight a Standard of a Chapter, all its related items will be displayed accordingly.



The screenshot shows the 'CONTENT' tab in the MGS system. The 'chapter3' is selected in the 'Chapter' list. The 'Standard' list is empty, and the 'Measurable Elements of Standards' table is also empty.

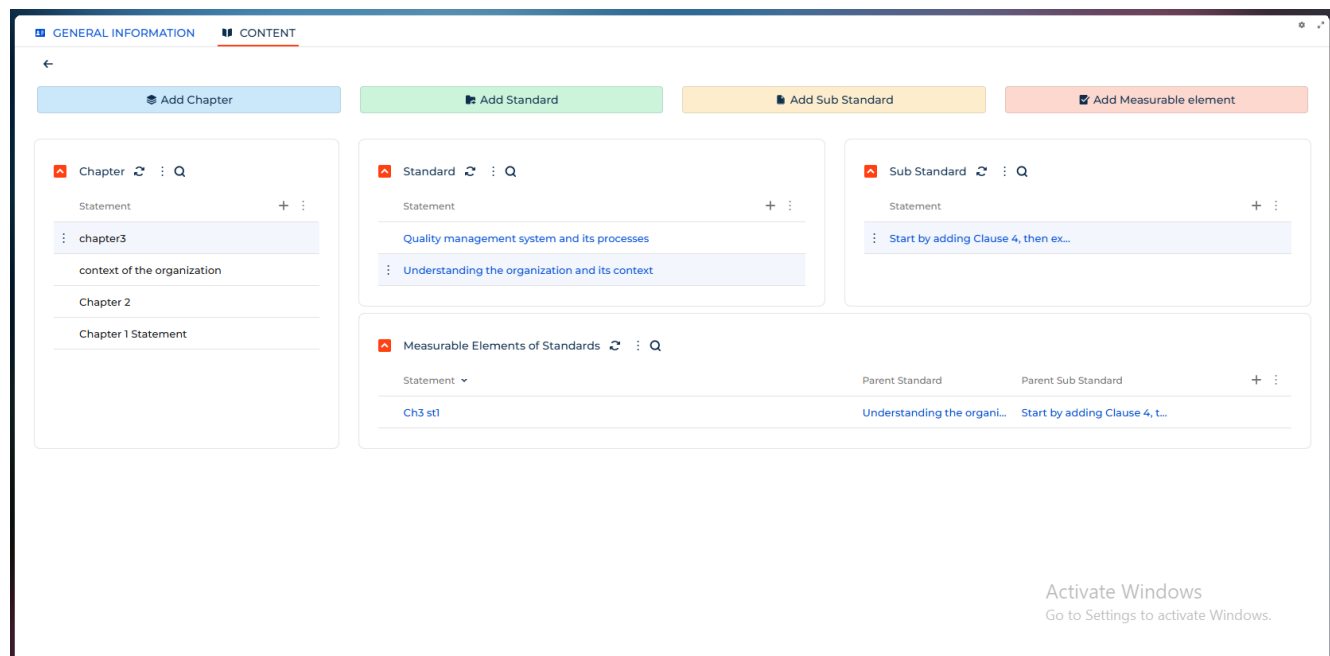
Statement	Parent Standard	Parent Sub Standard
No data		



The screenshot shows the 'CONTENT' tab in the MGS system. The 'chapter3' is selected in the 'Chapter' list. The 'Standard' list is populated with 'Quality management system and its processes' and 'Understanding the organization and its context'. The 'Measurable Elements of Standards' table is also populated with 'Ch3 st1' and 'Understanding the organi...'.

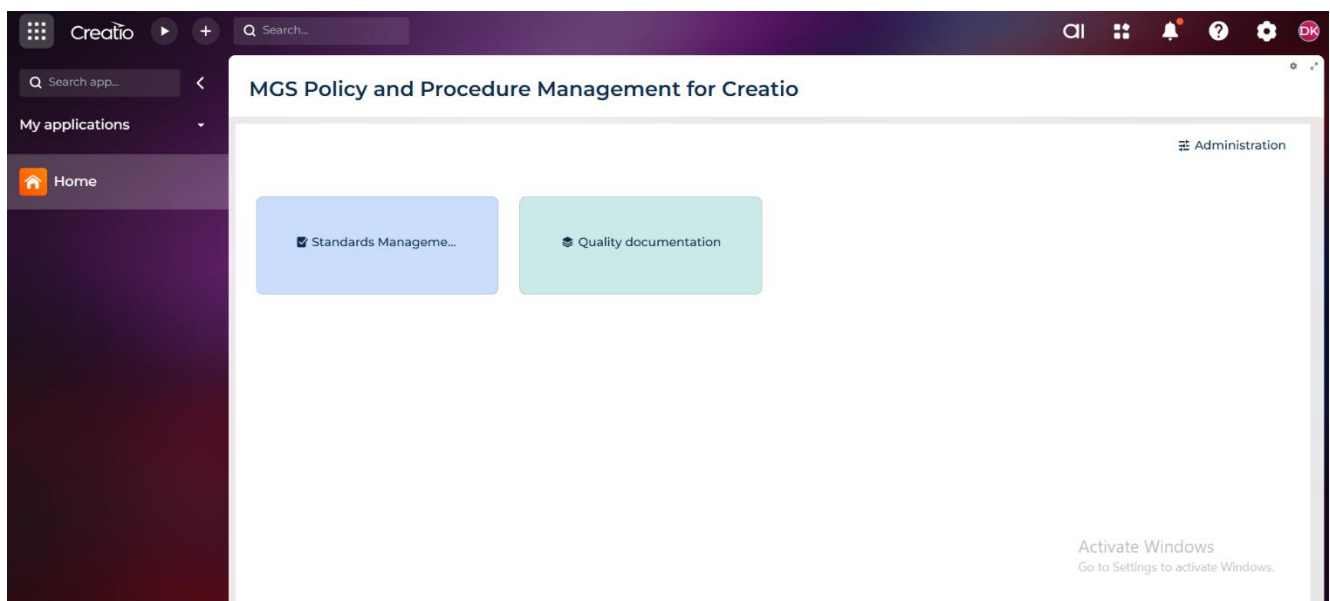
Statement	Parent Standard	Parent Sub Standard
Ch3 st1	Understanding the organi...	Start by adding Clause 4, t...

- When you highlight a Sub-Standard of a Chapter, all its related items will be displayed accordingly.

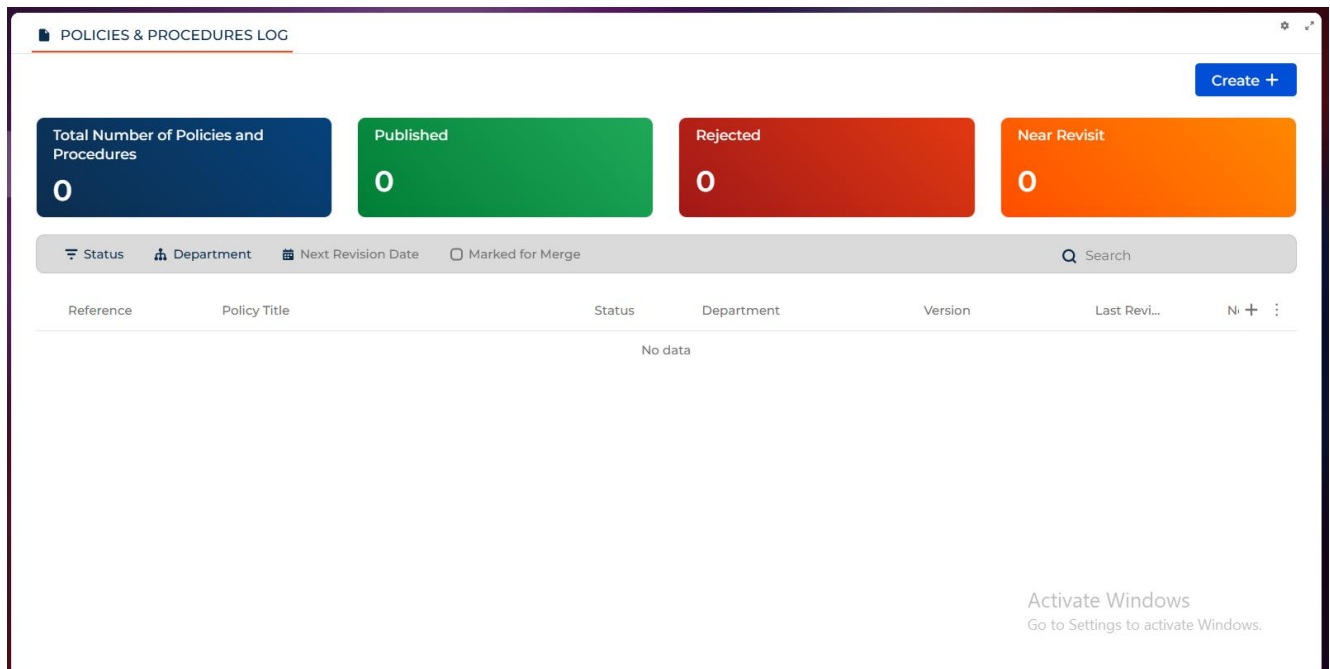


Chapter 4: MGS Policy and Procedure Management for Creatio - Quality Documentation

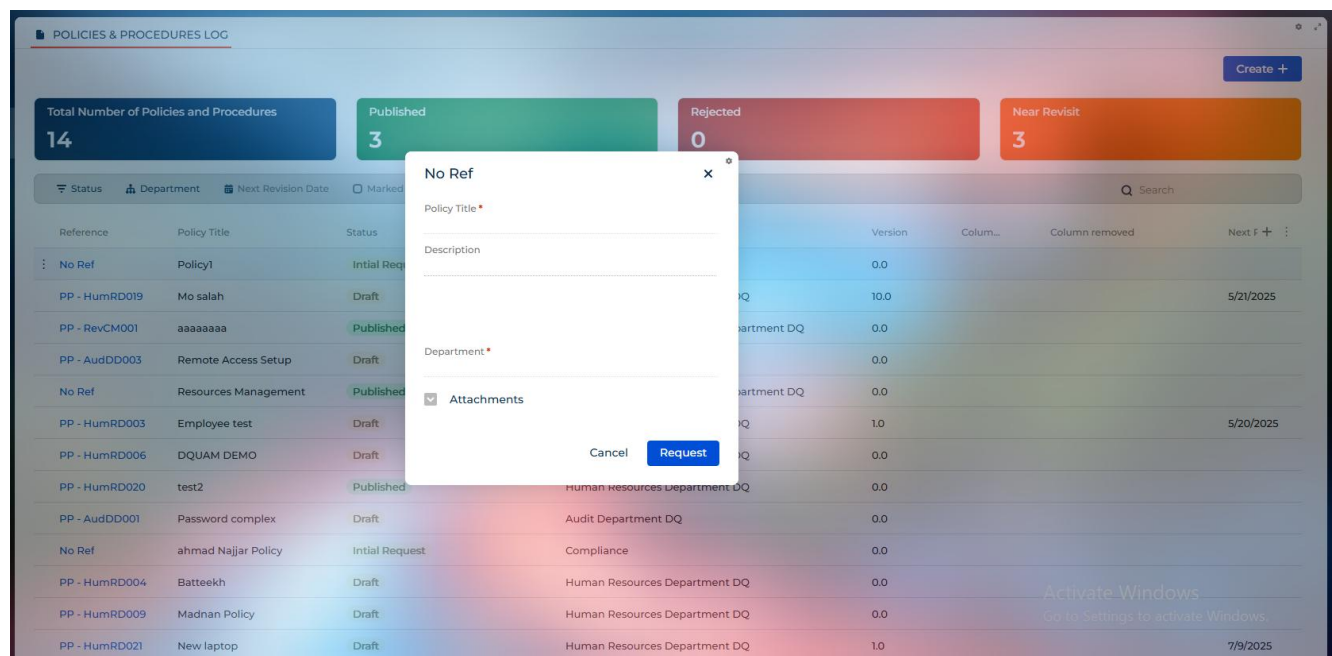
- From the home page of MGS Policy and Procedure Management for Creatio, navigate to the 'Quality Documentation' folder.



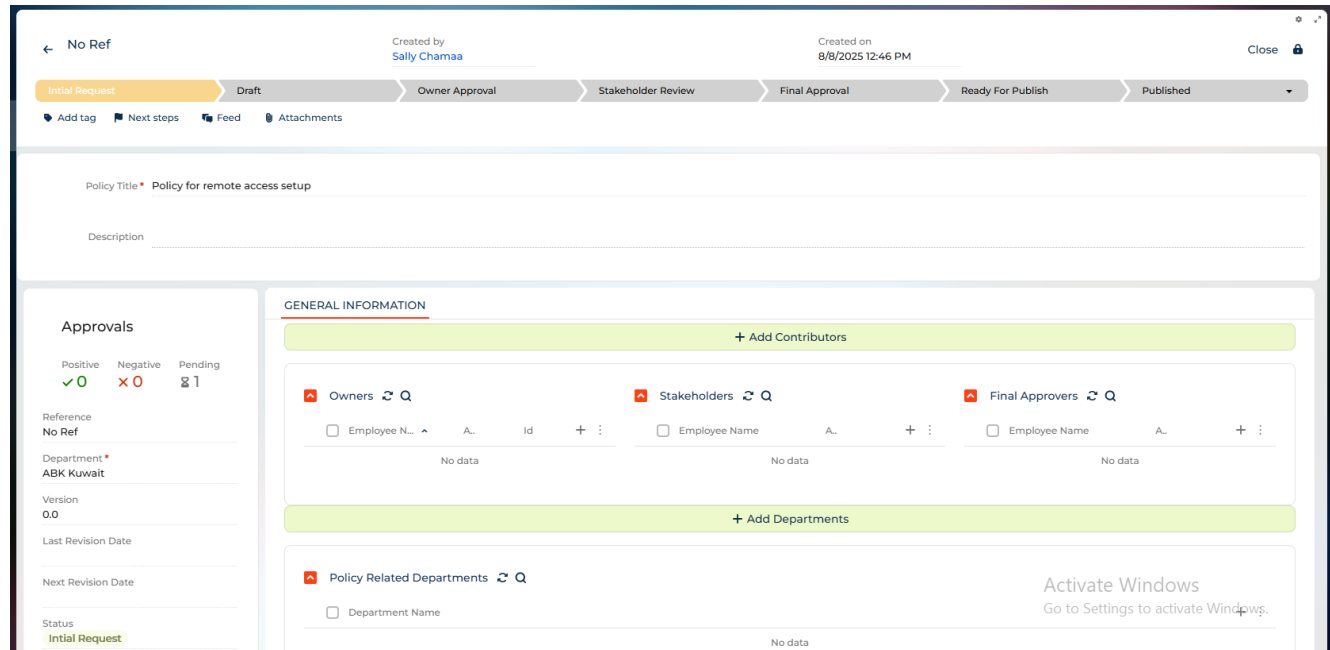
- On the Policy & Procedure log page, you will find a list of all policies created in the system. You can filter this list by 'Status,' 'Department,' 'Next Revision Date,' and policies marked as merged. Additionally, metrics related to the total number of policies and procedures, 'Published,' 'Rejected,' and 'New Revisit' are also displayed.



- On the right side of the page, click the 'Create' button to start a new policy. A mini page will open—fill in the required metadata and then click 'Request'.

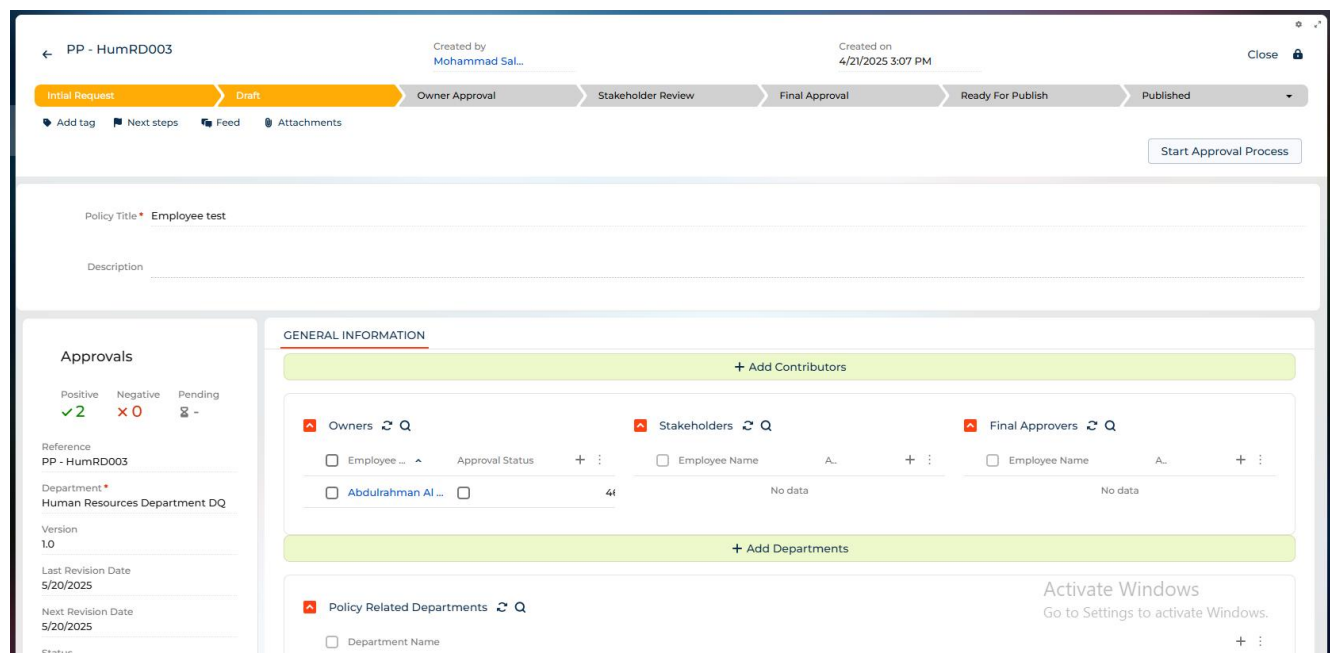


- Open the created record and begin adding the contributors (Owners, Stakeholders, and Final Approvers), as well as the related departments (Policy Related Departments). The process will start at the 'Initial Request' stage, and an approval request will be sent to the responsible parties.



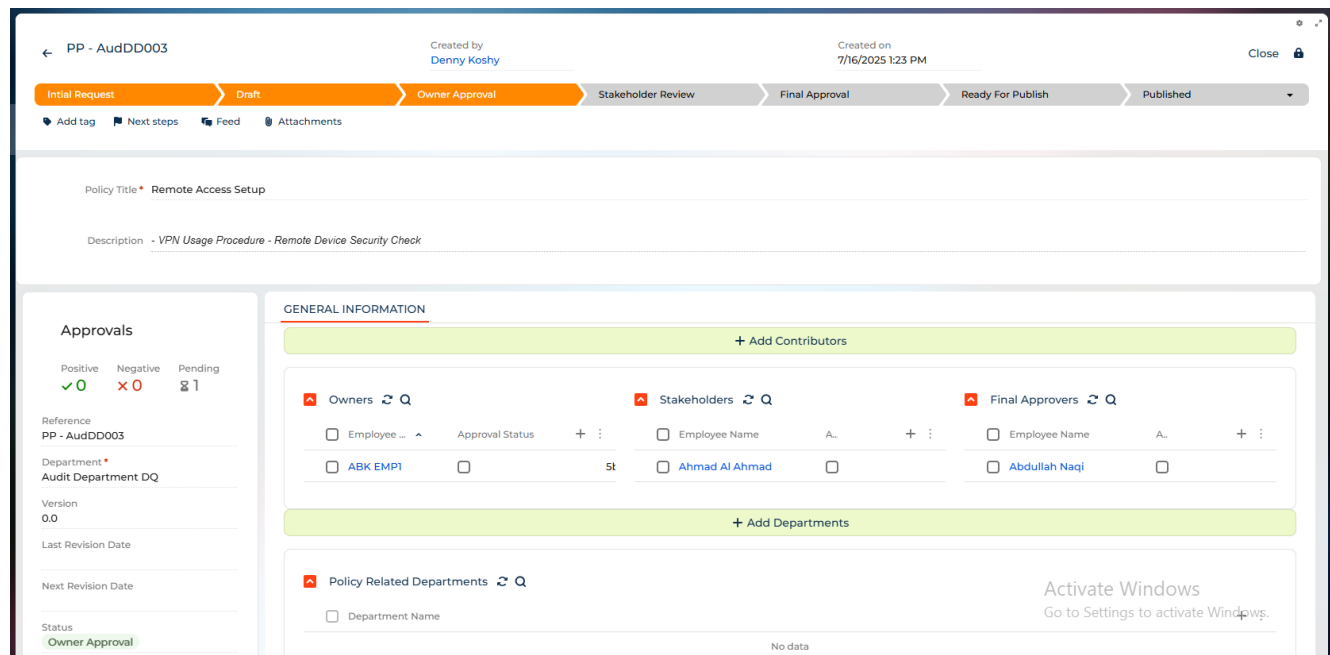
The screenshot shows the 'Initial Request' stage of a policy record. The top navigation bar includes a back arrow, the reference 'No Ref', the creator 'Sally Chamaa', the creation date '8/8/2025 12:46 PM', and a 'Close' button. Below the navigation bar is a progress bar with stages: Initial Request (active), Draft, Owner Approval, Stakeholder Review, Final Approval, Ready For Publish, and Published. The main form area has fields for 'Policy Title' (Policy for remote access setup) and 'Description'. On the left, there is an 'Approvals' section with a summary: Positive (2), Negative (0), and Pending (1). Below this, the 'Reference' is 'No Ref', 'Department' is 'ABK Kuwait', 'Version' is '0.0', and 'Status' is 'Initial Request'. The 'GENERAL INFORMATION' section on the right has a '+ Add Contributors' button and three tables for 'Owners', 'Stakeholders', and 'Final Approvers'. Each table has columns for 'Employee Name', 'Approval Status', and 'Id'. Below these tables is a '+ Add Departments' button and a 'Policy Related Departments' section with a 'Department Name' field. An 'Activate Windows' watermark is visible in the bottom right corner.

After approval, the stage will automatically move to 'Draft,' and the 'Start Approval Process' button will appear.



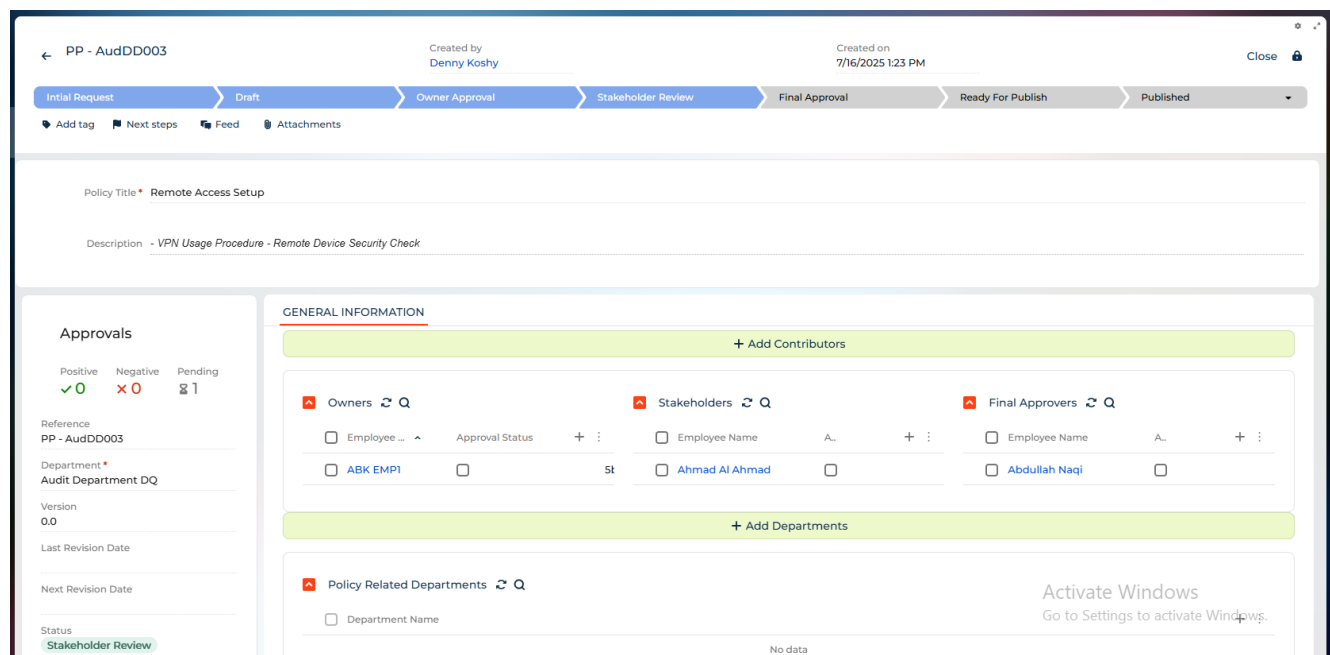
The screenshot shows the 'Draft' stage of a policy record. The top navigation bar includes a back arrow, the reference 'PP - HumRD003', the creator 'Mohammad Sal...', the creation date '4/21/2025 3:07 PM', and a 'Close' button. Below the navigation bar is a progress bar with stages: Initial Request, Draft (active), Owner Approval, Stakeholder Review, Final Approval, Ready For Publish, and Published. A 'Start Approval Process' button is visible in the top right. The main form area has fields for 'Policy Title' (Employee test) and 'Description'. On the left, there is an 'Approvals' section with a summary: Positive (2), Negative (0), and Pending (1). Below this, the 'Reference' is 'PP - HumRD003', 'Department' is 'Human Resources Department DQ', 'Version' is '1.0', and 'Status' is 'Draft'. The 'GENERAL INFORMATION' section on the right has a '+ Add Contributors' button and three tables for 'Owners', 'Stakeholders', and 'Final Approvers'. The 'Owners' table has one entry: 'Abdulrahman Al...' with an 'Approval Status' of '4'. Below these tables is a '+ Add Departments' button and a 'Policy Related Departments' section with a 'Department Name' field. An 'Activate Windows' watermark is visible in the bottom right corner.

5. Once the approval process starts, the stage will advance to ‘Owner Approval’.



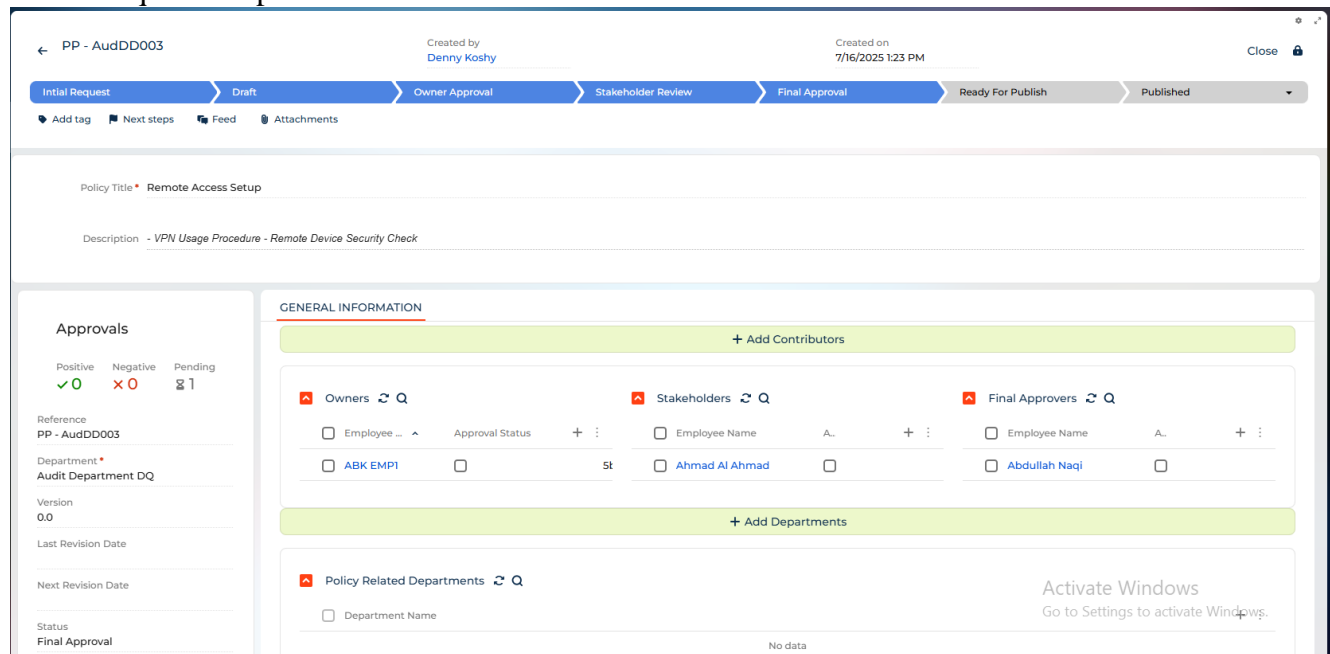
The screenshot displays the 'PP - AudDD003' policy page. The top navigation bar shows the current stage as 'Owner Approval' in orange, with previous stages 'Initial Request' and 'Draft' also highlighted. The right side of the bar shows 'Stakeholder Review', 'Final Approval', 'Ready For Publish', and 'Published'. Below the bar, the policy details are shown: 'Policy Title: Remote Access Setup' and 'Description: VPN Usage Procedure - Remote Device Security Check'. The left sidebar contains an 'Approvals' section with a status indicator for 'Owner Approval' (green checkmark). The main content area is titled 'GENERAL INFORMATION' and includes sections for 'Add Contributors', 'Owners', 'Stakeholders', 'Final Approvers', 'Add Departments', and 'Policy Related Departments'. The 'Owners' section lists 'ABK EMPI' with an approval status of 'St'. The 'Stakeholders' section lists 'Ahmad Al Ahmad'. The 'Final Approvers' section lists 'Abdullah Naqi'. The 'Policy Related Departments' section is currently empty.

6. After the Owner approves the policy, the stage will advance to ‘Stockholders Review’ for further evaluation.



The screenshot displays the 'PP - AudDD003' policy page. The top navigation bar shows the current stage as 'Stakeholder Review' in blue, with previous stages 'Initial Request', 'Draft', and 'Owner Approval' also highlighted. The right side of the bar shows 'Final Approval', 'Ready For Publish', and 'Published'. Below the bar, the policy details are shown: 'Policy Title: Remote Access Setup' and 'Description: VPN Usage Procedure - Remote Device Security Check'. The left sidebar contains an 'Approvals' section with a status indicator for 'Stakeholder Review' (green checkmark). The main content area is titled 'GENERAL INFORMATION' and includes sections for 'Add Contributors', 'Owners', 'Stakeholders', 'Final Approvers', 'Add Departments', and 'Policy Related Departments'. The 'Owners' section lists 'ABK EMPI' with an approval status of 'St'. The 'Stakeholders' section lists 'Ahmad Al Ahmad'. The 'Final Approvers' section lists 'Abdullah Naqi'. The 'Policy Related Departments' section is currently empty.

- After the Stockholders' review, the record will be sent for final approval to determine the next required steps



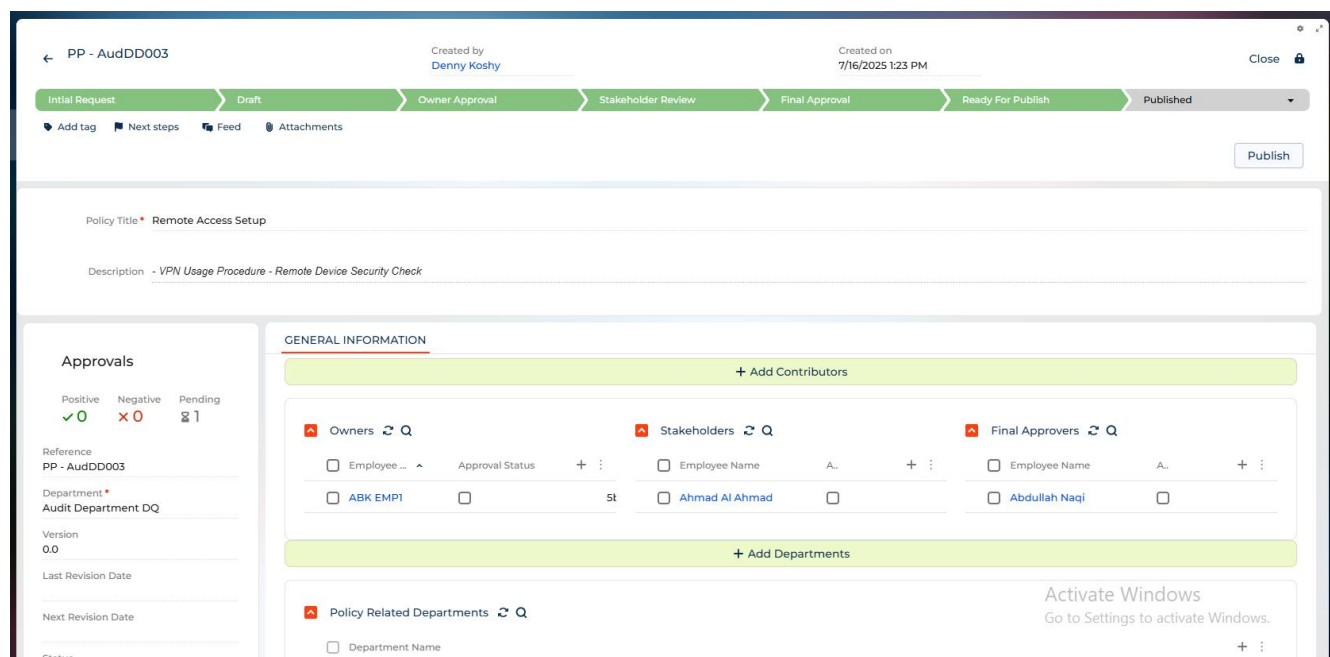
The screenshot displays the 'Final Approval' stage of a policy request. The top navigation bar shows the workflow: Initial Request, Draft, Owner Approval, Stakeholder Review, Final Approval, Ready For Publish, and Published. The 'Final Approval' stage is currently active. The policy title is 'Remote Access Setup' and the description is 'VPN Usage Procedure - Remote Device Security Check'. The left sidebar shows the 'Approvals' section with a table of approvals. The main content area is titled 'GENERAL INFORMATION' and includes sections for 'Owners', 'Stakeholders', and 'Final Approvers'. Each section has a table with columns for 'Employee Name' and 'Approval Status'. The 'Owners' table has one entry: 'ABK EMP1' with a status of 'St'. The 'Stakeholders' table has one entry: 'Ahmad Al Ahmad' with a status of 'A.'. The 'Final Approvers' table has one entry: 'Abdullah Naqi' with a status of 'A.'. There are also sections for 'Add Contributors', 'Add Departments', and 'Policy Related Departments'.

Employee Name	Approval Status
ABK EMP1	St

Employee Name	Approval Status
Ahmad Al Ahmad	A.

Employee Name	Approval Status
Abdullah Naqi	A.

- After final approval, the stage will advance to 'Ready to Publish,' and a 'Publish' button will appear.



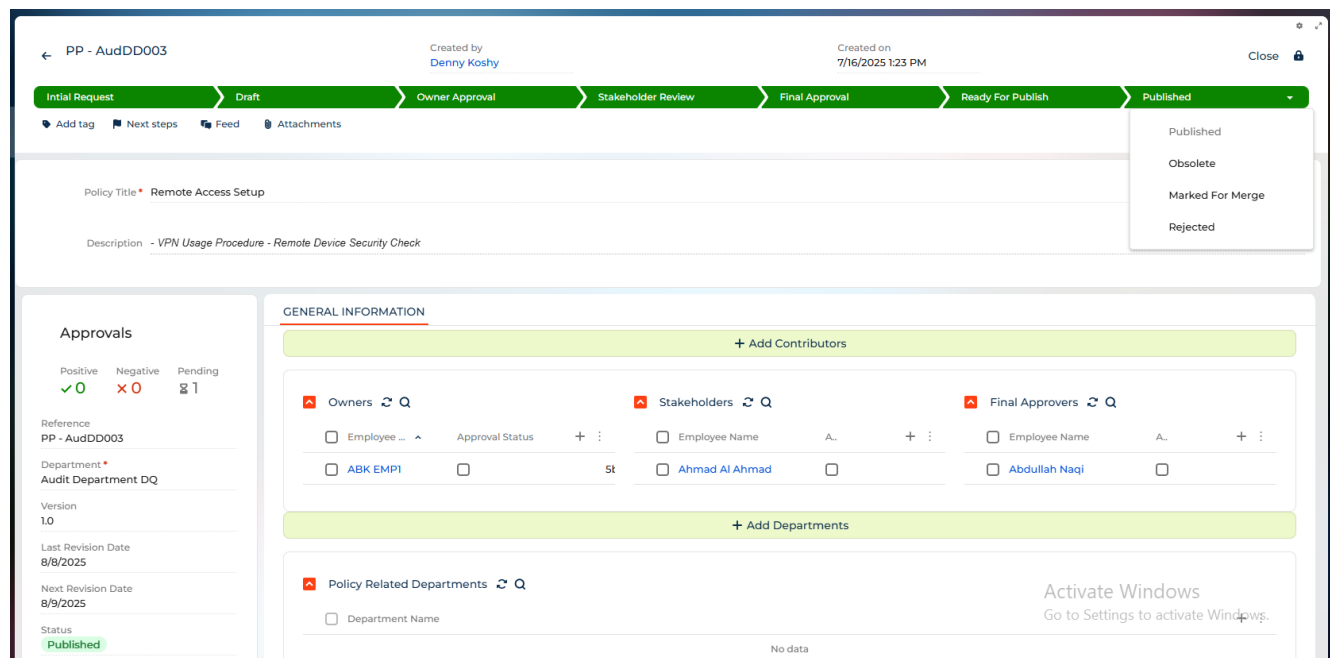
The screenshot displays the 'Ready For Publish' stage of a policy request. The top navigation bar shows the workflow: Initial Request, Draft, Owner Approval, Stakeholder Review, Final Approval, Ready For Publish, and Published. The 'Ready For Publish' stage is currently active. The policy title is 'Remote Access Setup' and the description is 'VPN Usage Procedure - Remote Device Security Check'. The left sidebar shows the 'Approvals' section with a table of approvals. The main content area is titled 'GENERAL INFORMATION' and includes sections for 'Owners', 'Stakeholders', and 'Final Approvers'. Each section has a table with columns for 'Employee Name' and 'Approval Status'. The 'Owners' table has one entry: 'ABK EMP1' with a status of 'St'. The 'Stakeholders' table has one entry: 'Ahmad Al Ahmad' with a status of 'A.'. The 'Final Approvers' table has one entry: 'Abdullah Naqi' with a status of 'A.'. There are also sections for 'Add Contributors', 'Add Departments', and 'Policy Related Departments'. A 'Publish' button is now visible in the top right corner.

Employee Name	Approval Status
ABK EMP1	St

Employee Name	Approval Status
Ahmad Al Ahmad	A.

Employee Name	Approval Status
Abdullah Naqi	A.

- To publish the policy, click the 'Publish' button to publish it automatically. Alternatively, you can change the policy's stage to 'Obsolete,' 'Marked for Merge,' or 'Rejected' as needed.



The screenshot shows the 'PP - AudDD003' policy page. At the top, a progress bar indicates the stages: Initial Request, Draft, Owner Approval, Stakeholder Review, Final Approval, Ready For Publish, and Published. The current stage is 'Published'. Below the progress bar, there are tabs for 'Add tag', 'Next steps', 'Feed', and 'Attachments'. The policy title is 'Remote Access Setup' and the description is 'VPN Usage Procedure - Remote Device Security Check'. On the left, there is an 'Approvals' section showing 'Positive' (0), 'Negative' (0), and 'Pending' (1) counts. The 'GENERAL INFORMATION' section includes fields for 'Owners', 'Stakeholders', and 'Final Approvers', each with a search icon. Below these are sections for 'Add Contributors' and 'Add Departments'. The 'Policy Related Departments' section is currently empty. A 'Status' field at the bottom left shows 'Published'.

Chapter 5: MGS Policy and Procedure Management for Creatio – Dashboard

- Navigate to the Desktop page to access all dashboards related to Policy and Procedure.

