

iSOMS® Agency User Forms

Just like WinSOMS there is a place in iSOMS to add Forms and documents accessible to users for download. Generally these are Fillable PDF or MS-Word templates for the user to fill in. This document will cover how to add the forms, give security access to the users, and then the menu option for the users to the list of forms for a specific Agency.

Adding Forms

You must be an Agency Super user to add forms. From the main menu, expand the Admin menu, Agency Menu, then select Company Setup.



Click on ALL to get list of all agencies in your system. Then Select your agency.

A screenshot of the Anderson County Company Setup search interface. The header is dark blue with a hamburger menu icon and the text 'ANDERSON COUNTY'. Below the header is a light blue bar with the text 'Company Setup: Search'. The main content area is light gray. It features a search form with the label 'Agency Name:' followed by a text input field. Below the input field is a 'Type of Match:' section with three radio buttons: 'Begins' (selected), 'Contains', and 'Ends'. Below this is a 'Show Archived Only:' checkbox, which is currently unchecked. At the bottom are three buttons: 'ALL', 'LOOKUP', and 'CLEAR FILTER'.

In the lower right select the tab for Agency User Forms

To add a new form, click the button on the far right for “Add Attachment”

Company Setup: View Record

LOOKUP AUDITS BACK TO SEARCH RESULTS ADD REPORTS MAINTAIN FILES

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

ANDERSON (865)-457-2414 Fax #: Email:

Website:

Department: ANDERSON COUNTY SHERIFF X SSA Facility ID: LRLA SSA Reporter ID:

NCIC Devices Product Keys Setup Addresses Logos Signatures Sounds Application A... Settings Email Events

Case Num... Interfaces Notes Reports Internet A... Images Attache... State IBR ... Text / WC... Module R... Agency Us... Employee ...

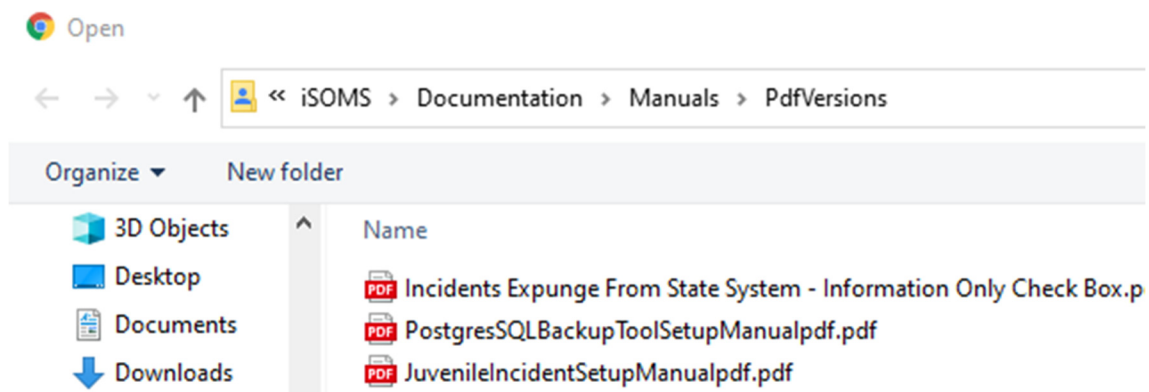
EXPORT GRID TO FILE ADD ATTACHMENT

35 Attachments

Attachment	Entry Date	Category	Sub-Category	Description	
PDF	02/19/2020 10:26			ACDF Arrest Intake Form	
PDF	02/19/2020 10:24			Case Information Disposition Sheet	
PDF	02/19/2020 10:22			Crime Lab Request For Examination Form	

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Browse to the File, Fillable PDF or Word Document you want to allow the users to download.



The most important field on this screen is the Description box at the bottom. This is the description that will be displayed in the grid for the user. So you if add several warrant forms or Personnel forms, describe them in that field.

Saying something like Consent to Search 1, Consent to Search 2, and Consent to Search 3 would not be helpful in selecting a Consent to Search Person, Consent to Search Premises, and Consent to Search Vehicle.

Click Save when finished.

View Attachment Information

Entered By: LAY, LARRY
Entered On: 02/19/2020 10:24

File Name: CASE INFORMATION - DISPOSITION SHEET.pdf
Report Date: 02/19/2020

Category: Sub-Category:

Description:
Case Information Disposition Sheet

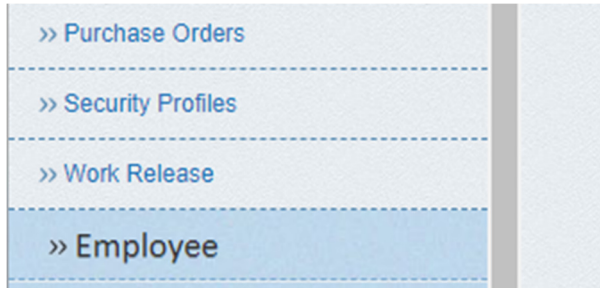
VIEW ATTACHMENT AUDITS MAINTAIN FILES

SAVE DELETE EXIT

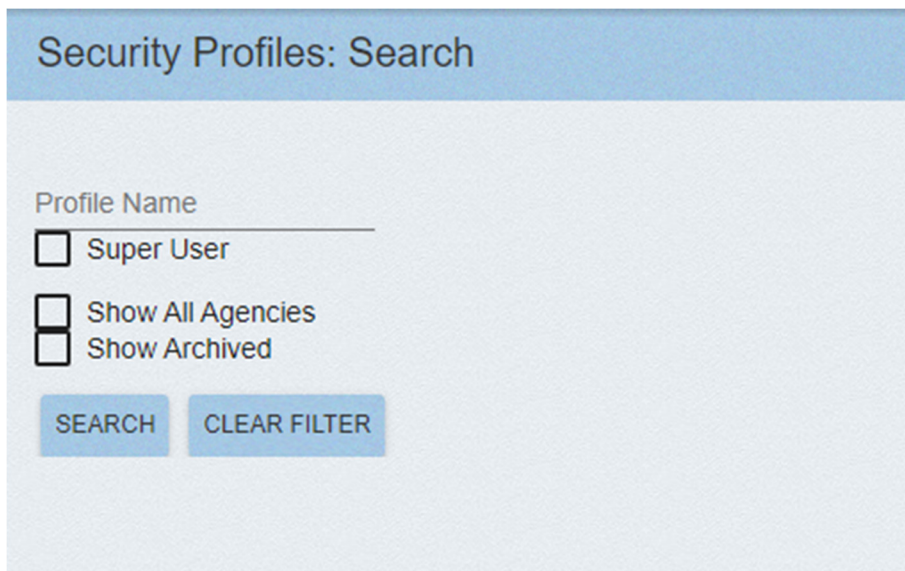
Adding Security to allow users to Access the forms

You also need to modify the Security Profile(s) to allow the users access to these forms.

Select the Admin Menu, Agency Menu then Security Profiles.



Type in a name of profile to search, or click Search (with the Profile name field empty to see a list of all profiles).

A screenshot of a web form titled 'Security Profiles: Search'. The title is in a blue header bar. Below the header, there is a search bar with the placeholder text 'Profile Name'. To the left of the search bar are three checkboxes, each followed by a label: 'Super User', 'Show All Agencies', and 'Show Archived'. At the bottom of the form are two buttons: 'SEARCH' and 'CLEAR FILTER'. The 'SEARCH' button is light blue, and the 'CLEAR FILTER' button is a slightly darker shade of blue.

Select the profile that needs access to the Agency User Forms

Security Profiles: Search Results		
Search Criteria ►		
Search Results		
31 Records		
Agency	Name	Description
ACSO	Admin	Admin
ACSO	CID	CID
ACSO	CID Supervisor	CID SUPERVISORS
ACSO	Court Security	Court Security
ACSO	DA Office	DA
ACSO	Dispatch Assistant Director	Dispatch Assistant Director
ACSO	Dispatch Supervisor	Dispatch Supervisor
ACSO	DISPATCHER	DISPATCHER ACSO
ACSO	DISPATCHER-NORRIS	NORRIS DISPATCHER

Click on the Modules Tab (2nd tab)

Find the Agency Forms / Attachments Module (company setup)

Click on **Can View** as the Security Option, then Click Save.

Anderson County Sheriffs Office

Security Profiles: View Record

<< FIRST < PRIOR NEXT > LAST >>

Agency: ACSO Name: MOBILE CAD - PATROL

Description: ACSO PATROL

Profile Permissions

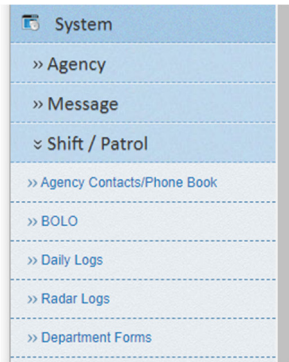
Agency Contacts / Phone Book	Module
Agency Criminal History Checks	Agency Forms / Attachments (company setup)
Agency Forms / Attachments (company setup)	<input type="checkbox"/> Super User
Alleged Abuse	<input checked="" type="checkbox"/> Can View
Animal Investigations	<input type="checkbox"/> Can Add
	<input type="checkbox"/> Can Edit
	<input type="checkbox"/> Hide Sensitive
	<input type="checkbox"/> Hide File Links
	<input type="checkbox"/> Hide Images
	<input type="checkbox"/> Hide Notes
	<input type="checkbox"/> Hide Print To Email

You would need to do this for all profiles that need access to the forms.

Accessing these forms.

When the user logs into iSOMS and wants to access/download one of the forms you have added (if they have security profile rights to do so)

Click on the System Menu, Shift/Patrol Menu, Department Forms



The grid will be displayed with all forms you have added (via company setup)

They need only to click on the Attachment. (Click on the 1st column of the row they want) In the example below click on the 2nd row, the letters PDF in the 1st column.

System will download it to their browser to be opened. (Lower left)

Info Center

Agency User Forms

35 Attachments

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PDF	02/19/2020 10:22			Crime Lab Request For Examination Fo
PDF	02/19/2020 10:18			Time Off Request Form
PDF	02/19/2020 10:13			Use Of Force Report

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PDF

CASE INFORMATI....pdf

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