

## iSOMS® Agency User Forms

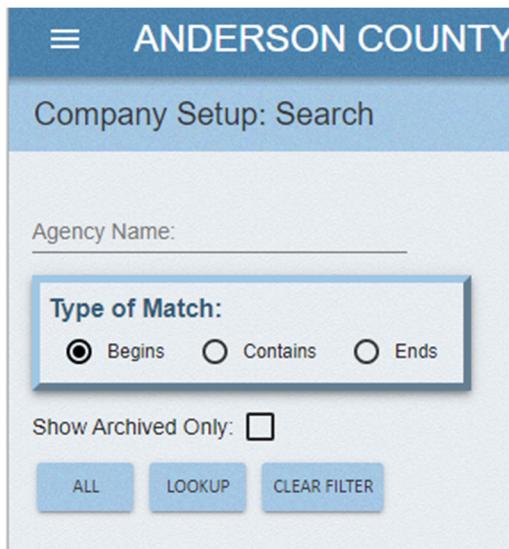
Just like WinSOMS there is a place in iSOMS to add Forms and documents accessible to users for download. Generally these are Fillable PDF or MS-Word templates for the user to fill in. This document will cover how to add the forms, give security access to the users, and then the menu option for the users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

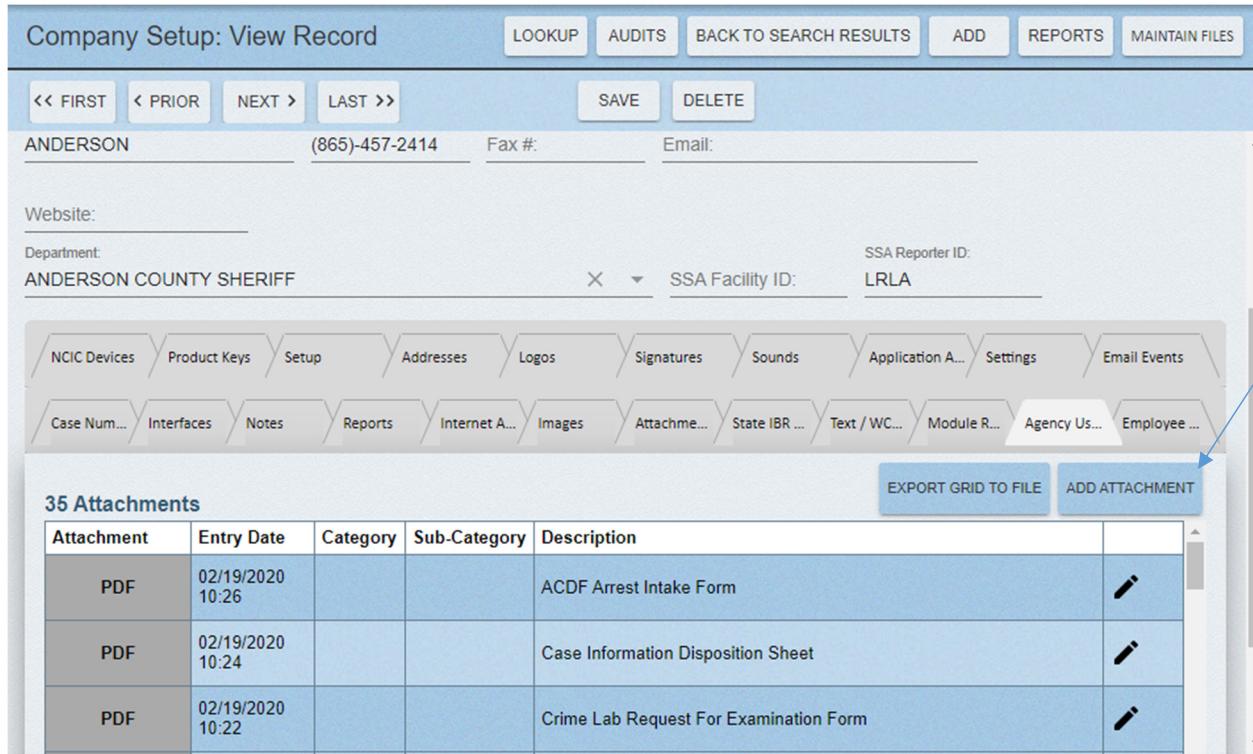


Click on ALL to get list of all agencies in your system. Then Select your agency.



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

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

Website: \_\_\_\_\_

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

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

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

**35 Attachments**

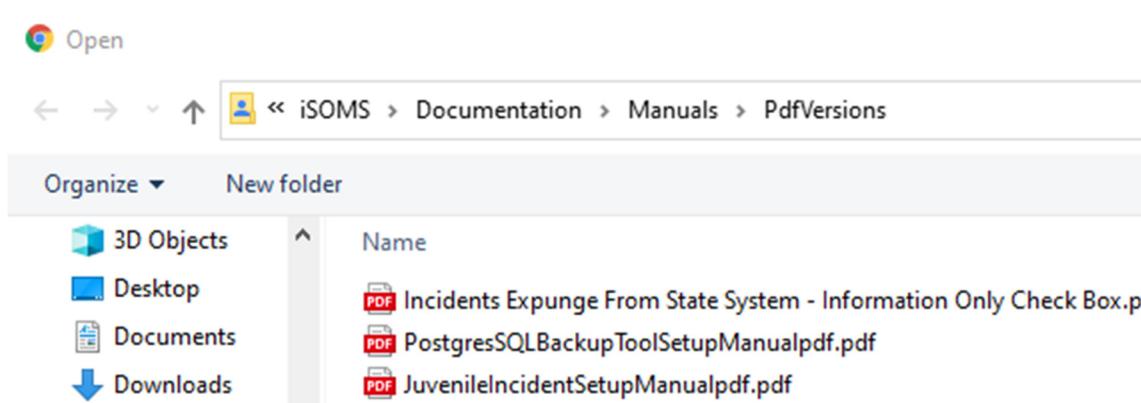
Attachment Entry Date Category Sub-Category Description

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	

EXPORT GRID TO FILE ADD ATTACHMENT

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



Open

← → ⌘ ⌘ ⌘ << iSOMS > Documentation > Manuals > PdfVersions

Organize ▾ New folder

	Name
	3D Objects
	Desktop
	Documents
	Downloads
	Incidents Expunge From State System - Information Only Check Box.pdf
	PostgresSQLBackupToolSetupManual.pdf
	JuvenileIncidentSetupManual.pdf

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.

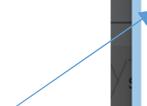
View Attachment Information

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

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

Category: Sub-Category:

Description:  
Case Information Disposition Sheet



## 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 search interface titled 'Security Profiles: Search'. The interface includes a 'Profile Name' input field, a checkbox for 'Super User', and two checkboxes for 'Show All Agencies' and 'Show Archived'. At the bottom are 'SEARCH' and 'CLEAR FILTER' buttons.

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	Name
ACSO	MOBILE CAD - PATROL
Description	ACSO PATROL

**Profile Permissions**

Module
Agency Contacts / Phone Book
Agency Criminal History Checks
<b>Agency Forms / Attachments (company setup)</b>
Alleged Abuse
Animal Investigations

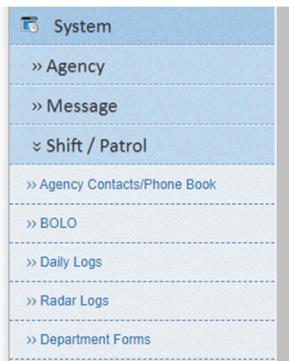
Super User     Hide Sensitive  
 Can View     Hide File Links  
 Can Add     Hide Images  
 Can Edit     Hide Notes  
 Can Delete     Hide Print To Email

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 1<sup>st</sup> column of the row they want) In the example below click on the 2<sup>nd</sup> row, the letters PDF in the 1<sup>st</sup> column.

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

A screenshot of the iSOMS Info Center. The title bar says 'Info Center'. Under 'Agency User Forms', there is a table titled '35 Attachments' with columns: Attachment, Entry Date, Category, Sub-Category, and Description. The table rows are: 1. PDF, 02/19/2020 10:26, , , ACDF Arrest Intake Form; 2. PDF, 02/19/2020 10:24, , , Case Information Disposition Sheet; 3. PDF, 02/19/2020 10:22, , , Crime Lab Request For Examination For; 4. PDF, 02/19/2020 10:18, , , Time Off Request Form; 5. PDF, 02/19/2020 10:13, , , Use Of Force Report. At the bottom, a download progress bar shows 'CASE INFORMATI....pdf' and '100%'. The footer says 'Copyright© 2016-2020 M &amp; M Micro Systems, Inc.'