

## HOW TO CREATE A MASTER NAME

Navigate to Master Name under Records -> Back Office -> Master Name and click on it.



If you cannot click on Master Name in iSoms menu, you will need to ask an administrator for permissions to this module before you can use it.

You are greeted with the search screen, where you can navigate to any Master Name that has already been added and access them.

A screenshot of the iSOMS web application interface. The page is titled 'Master Name: Search' and includes a search bar and a 'NEW MASTER NAME' button. Below the search bar are various input fields for searching by name, date of birth, phone number, address, and other identifiers. A 'Type of Match' section is highlighted with a blue box, showing radio buttons for 'Begins', 'Contains', and 'Ends'. There are also checkboxes for 'Include Sounds Like' and 'Show Archived Only', and buttons for 'LOOKUP' and 'CLEAR FILTER'.

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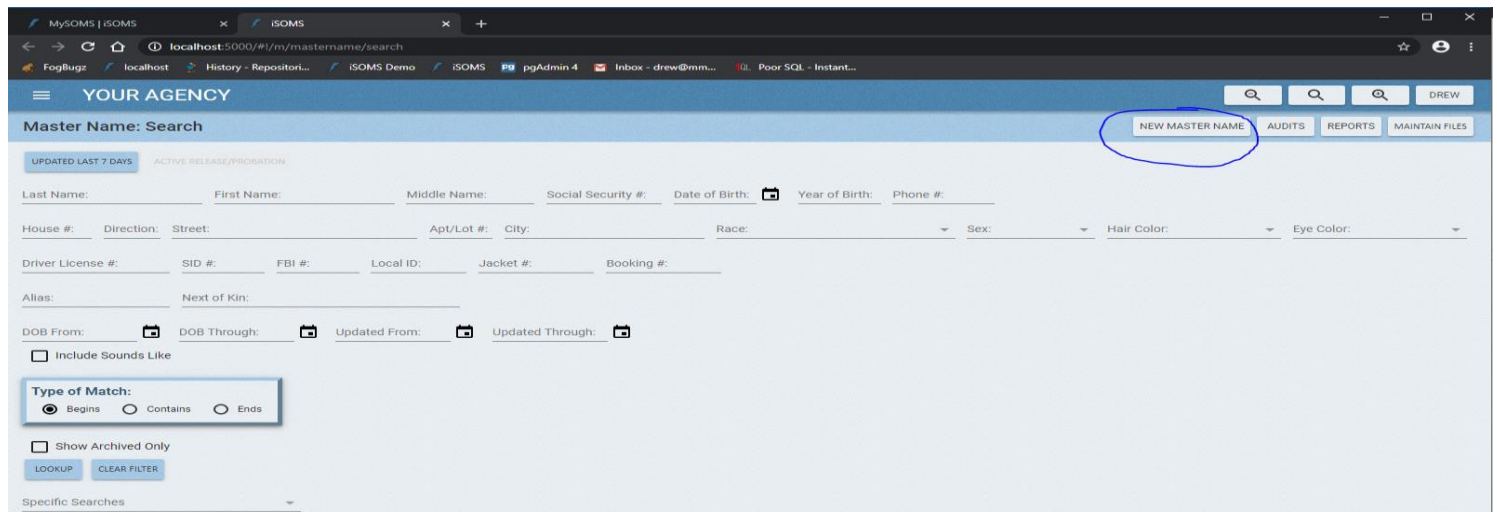
At the top of the search you have some quick search buttons that you can utilize to find Master Name records that have been updated within the last 7 days and records that are Active Release/Probation.

You can also search by Last Name, First Name, Social Security Number, Date of Birth, etc. (There is also an option for a checkbox at the bottom to show archived only if you wish to do so.)

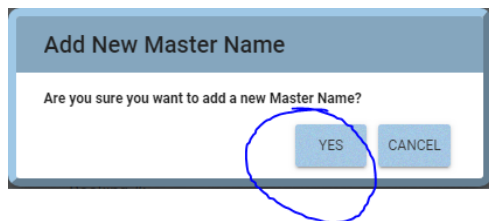
If any fields are missing, to enter something for those fields, they will be located in Maintain files in the top right. (If you cannot see this button, it is because you do not have permission) Ask administration to add something in the field you are needing.

## HOW TO ADD A NEW MASTER NAME

To add new Master Name, from the search screen, navigate to the top right where it says NEW MASTER NAME. Click on that button.

The screenshot shows the 'YOUR AGENCY' interface for 'Master Name: Search'. The top navigation bar includes buttons for 'NEW MASTER NAME', 'AUDITS', 'REPORTS', and 'MAINTAIN FILES'. The 'NEW MASTER NAME' button is circled in blue. Below the navigation bar, there are various search filters including 'UPDATED LAST 7 DAYS', 'ACTIVE RELEASE/PROBATION', and fields for Last Name, First Name, Middle Name, Social Security #, Date of Birth, Year of Birth, and Phone #. There are also checkboxes for 'Include Sounds Like' and 'Show Archived Only', and a 'Type of Match' section with radio buttons for 'Begins', 'Contains', and 'Ends'. At the bottom, there are 'LOOKUP' and 'CLEAR FILTER' buttons.

It will ask, Are you sure you want to add a new Master Name? Click YES.

The screenshot shows a modal dialog titled 'Add New Master Name'. It contains the text 'Are you sure you want to add a new Master Name?' and two buttons: 'YES' and 'CANCEL'. The 'YES' button is circled in blue.

A new screen will appear where you can add your new Master Name. Enter Last Name, First Name, DOB, Social Security Number, Address, and any information you may have about this person being entered. There are many tabs to go through on this page to enter many more fields of information.

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localhost:5000/#/m/mastername/view/1611992

YOUR AGENCY

Master Name: View Record

LOOKUP NEW MASTER NAME AUDITS REPORTS MAINTAIN FILES

<< FIRST < PRIOR NEXT > LAST >>

SAVE DELETE

Last Updated: 01/31/2020 13:02 - By MYERS, DREW

Last Name: First Name: Middle Name: Jr/Sr: Social Security #: Date of Birth: Age From: Age Through:

House #: Direction: Street: Apt/Lot #: City: State: ZIP Code: County:

Resident:

Home Phone: Cell Phone: Work Phone:

Military ID: SID #: FBI #: Local ID: ICE #: DOC #: Student ID: Other ID:

DL State: Driver License #: Class: Expiration Date: Status: ☐ CDL

Biographical Employer Family Contact Relationships Aliases Features Address History Employer History Phones

Additional ID's Internet Accounts Notes Supplements Images Attachments Legacy Info Dockets

Race: Sex: Height: Weight: Hair Color: Eye Color: Build: Complexion: Marital Status:

Facial Hair: Glasses: Citizen: (Y/N) Ethnicity: Handed:

Place of Birth: City of Birth: State of Birth: Country of Birth:

School: Highest Grade/School:

Military Branch: Indian Tribe: Email: Text Account:

NO PHOTO

Image #: 0 of 0

When done entering all new Master Name, click the save button in the top middle of the screen. This will add your new Master Name record. You can then exit out of that tab after saving.

## HOW TO ACCESS MASTER NAME REPORTS

When on the Master Name search screen, in the top right next to the NEW MASTER NAME button, find the REPORTS button and click on that.

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This will direct you to the Master Name list reports page.

Here you can narrow down your list report by Last Name, First Name, DOB, etc.

Once you have the right criteria entered that you want to see for your list reports, click view at the bottom to view.  
(Make sure PDF is selected in report format to view)

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localhost:5000/#/m/mastername/reportrecordcheck?

FogBugz localhost History - Repositori... iSOMS Demo iSOMS pgAdmin 4 Inbox - drew@mm... Poor SQL - Instant...

YOUR AGENCY

Master Name: Records Check LOOKUP NEW MASTER NAME REPORTS MAINTAIN FILES

Report Style  
Records Check

Last Name: First: Middle Initial:

Date Of Birth: Race: Sex:

SSN:

☒ Warrants ☒ Booking ☒ Citations ☒ Arrested Incident Offenders

☐ Exact Name Match ☒ Include Booking Image

Report Format:  
☒ PDF ☐ Excel ☐ XML ☐ SQL

VIEW DOWNLOAD EMAIL CLEAR FILTER

Version 1.1

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