



Adding Agency Forms Guide

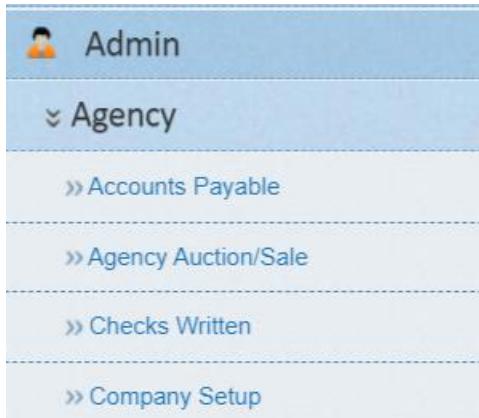
Accessing Agency Forms

Agency Forms is a listing of PDF/Word forms you can attach to iSOMS that users can access and download to fill out. The files can be in any format but generally they are form-fillable PDF and Word files.

The first step is uploading these forms into iSOMS. You must be an Agency Administrator (we call this a *Super User*) to access **Company Setup**.

Navigate to:

Admin → **Agency** → **Company Setup**



Click **ALL** and select your agency:

Agency Name:

Type of Match:

Begins Contains Ends

Show Archived Only:

ALL

Search Criteria ►		
Search Results		
1 Record		
Agency Short	Agency Name	Address
AGENCY	YOUR AGENCY	



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Now find the **Agency User Forms** tab:

A screenshot of a software interface titled "Company Setup: View Record". At the top, there are navigation buttons: "FIRST", "PRIOR", "NEXT", and "LAST". Below the buttons is a horizontal menu bar with various options: NCIC Devic..., Product Ke..., Setup, Addresses, Logos, Signatures, Sounds, Application..., Settings, Email Events, System No..., Case Nu..., Interfaces, Notes, Reports, Internet ..., Images, Attachme..., State IBR ..., Email / C..., Module R..., Agency U..., Employee..., Drug Tests Employee, Drug Tests Booking, Evidence Audits, and Site Names/URL. The "Agency U..." tab is highlighted. At the bottom, there is a sidebar with the title "Agency User Forms".

This tab allows you to add, edit, replace, or delete **Agency Forms** you want every employee / user to be able to access.

A screenshot of a grid titled "7 Attachments". The grid has columns: Attachment, Entry Date, Category, Sub-Category, File Name, and Description. There are five rows of data. Each row includes download and edit icons. The columns are labeled: Attachment, Entry Date, Category, Sub-Category, File Name, Description, and two empty columns for download and edit. The data is as follows:



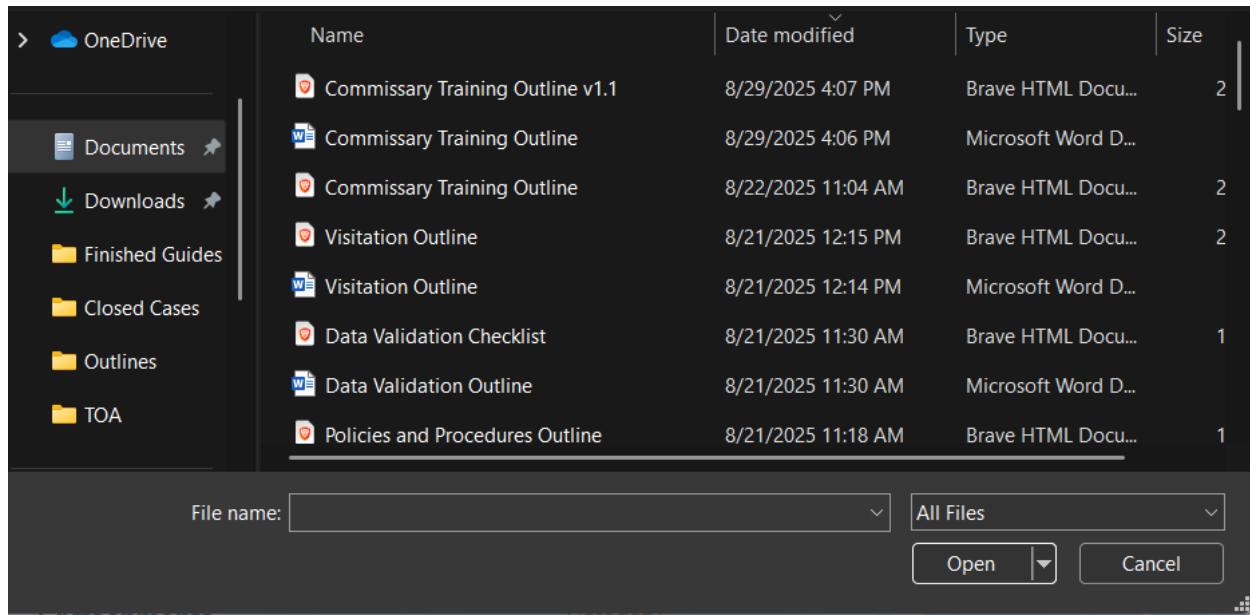
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Adding a New Attachment

To add a new **Agency Form**, simply click **Add Attachment** in the upper right.

ADD ATTACHMENT

Select the file you want to upload and hit **Open** or double-click it.



You can add a **Category** or **Sub-Category** if you'd like, but the most important field is **Description**. Users will see this as the name of the form when they access *Agency Forms*.

View Attachment Information

File Name:	Report Date:
Corrections - Lineup.pdf	09/01/2025
Category:	Sub-Category:
Description: CORRECTIONS OUTLINE	

SAVE **EXIT**



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You will be able to see the description and file on the grid of **Agency Forms**.

8 Attachments					Category:	DOWNLOAD ALL PDFS	SCAN	EXPORT GRID TO FILE	ADD ATTACHMENT	ADD ATTACHMENTS
Attachment	Entry Date	Category	Sub-Category	File Name	Description					
PDF	09/01/2025 15:05			Corrections - Lineup.pdf	CORRECTIONS OUTLINE					
PDF	01/06/2025 14:14			AR Cleburne Miranda.pdf	AR Cleburne Miranda Warning					
PDF	01/29/2024 17:20			FF_Veh Inspection Form.pdf	Vehicle Inspection Form					
PDF	01/29/2024 17:16			TBI Crime Lab Request.pdf	TBI Crime Lab Request					
PDF	01/29/2024 17:13			VICTIM_WITNESS_STATEMENT.pdf	Victim witness statement					

Deleting an Agency Form

To delete an Agency Form, simply double click it or click the pencil icon () to open its entry.

View Attachment Information

Entered By: THE GUY
Entered On: 09/01/2025 15:05

File Name: Corrections - Lineup.pdf Report Date: 09/01/2025

Category: Sub-Category:

Description:
CORRECTIONS OUTLINE

Now, click **Delete** to delete the form.

DELETE



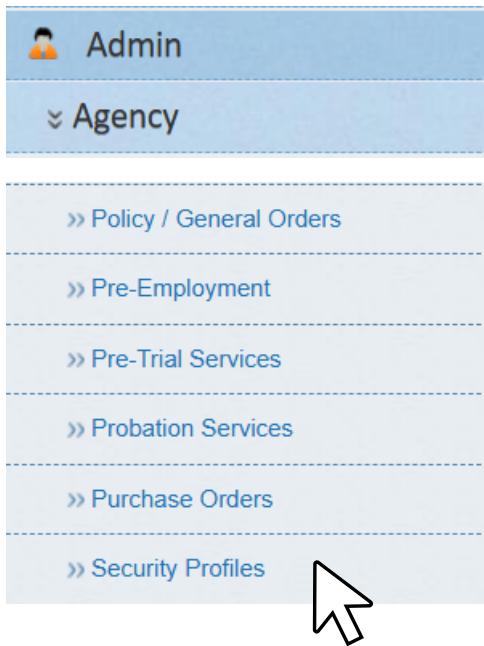
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Security Profiles

In iSOMS, employees can be assigned a *Security Profile*, which lists out all of viewing, creating, editing, and deleting privileges that group of employees will have. For employees to have access to these forms, you must edit profiles you have in iSOMS and make sure they have the following permission: **Can View - Agency Forms / Attachments (Company Setup)**.

Navigate to:

Admin → **Agency** → **Security Profiles**



Now enter and find by security profile name, or hit **LOOKUP** to see all profiles:

A screenshot of the "Security Profiles: Search" interface. It has a blue header bar with the text "Security Profiles: Search". Below it is a search form with a "Profile Name" input field and three checkboxes: "Super User", "Show All Agencies", and "Show Archived". At the bottom are two blue buttons: "LOOKUP" and "CLEAR FILTER".



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Select the profile you wish to edit to add access to the forms:

Security Profiles: Search Results

Search Criteria ►

Search Results

22 Records

Agency	Name	Description
BCSO	abc	abc
BCSO	ADMIN	ADMIN RECORDS
BCSO	Basic Security User	Basic Security User
BCSO	BOOKING	BOOKING OFFICER GENERAL
BCSO	CAD TV User	CAD TV User LCSO

Now click the **Module Permissions** heading button:

Security Profiles: View Record

LOOKUP NEW PROFILE AUDITS

« FIRST < PRIOR NEXT > LAST »

Agency: BCSO Name: BOOKING

Description: BOOKING OFFICER GENERAL Agency Super User

Approved For Agency: None

Profile Permissions Module Permissions

Find and click the **Agency Forms / Attachments (Company Setup)** module in the list:

Module
Accident
Accounts Payable
Agency Auction / Sale
Agency Configuration (company setup)
Agency Contacts / Phone Book
Agency Criminal History Checks
Agency Forms / Attachments (company setup)



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Now add **Can View** permission to the **Agency Forms / Attachments (Company Setup)** and **Save** the record. This will add the permission to this security profile. Any employee with this security profile will now be able to view the Agency Forms you have uploaded. You need to do this for each security profile you want to be able to view Agency Forms.

Module

Agency Forms / Attachments (company setup)

<input type="checkbox"/> Super User	<input type="checkbox"/> Hide File Links
<input checked="" type="checkbox"/> Can View	<input type="checkbox"/> Hide Images
<input type="checkbox"/> Can Add	<input type="checkbox"/> Hide Notes
<input type="checkbox"/> Can Edit	<input type="checkbox"/> Hide Print To Email
<input type="checkbox"/> Can Delete	<input type="checkbox"/> Hide Export To Xls
	<input type="checkbox"/> Hide Export To Csv
	<input type="checkbox"/> Hide Export To Db
	<input type="checkbox"/> Hide Export To Zip
	<input type="checkbox"/> Hide Module Scans/Attachments
	<input type="checkbox"/> Exclude From Push Notifications

Security Profiles: View Record

Navigation buttons: << FIRST, < PRIOR, NEXT >, LAST >>

Actions: **SAVE** (highlighted with a red box), **DELETE**



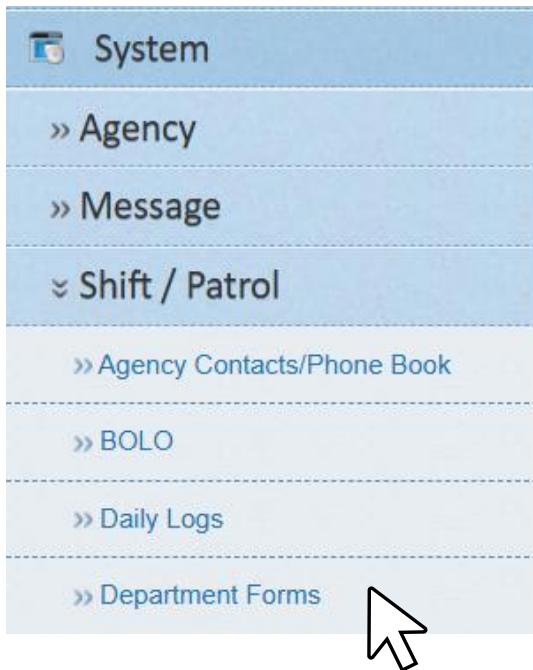
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Employees Viewing Agency Forms

Once an employee has the correct security profile privileges, they can now view agency forms.

Navigate to:

System → Shift / Patrol → Department Forms





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This will open the **Agency User Forms** list. You can either **Download All PDFs** with the button, or view any single attachment by clicking on the attachment type name (**PDF / DOCX / etc.**) to the left of the file you want to view:

7 Attachments					Category:	DOWNLOAD ALL PDFS	EXPORT GRID TO FILE
Attachment	Entry Date	Category	Sub-Category	File Name	Description		
PDF	01/06/2025 14:14			AR Cleburne Miranda.pdf	AR Cleburne Miranda Warning	Download	Edit
PDF	01/05/2020 06:14			OS City Morgan Warrant.pdf	Oliver Springs Warrant - Morgan County	Download	Edit
PDF	01/29/2024 17:16			TBI Crime Lab Request.pdf	TBI Crime Lab Request	Download	Edit
PDF	03/12/2020 16:17			CrimeInsight Vendor Application (1).pdf	Use Of Force fillable pdf	Download	Edit
PDF	01/29/2024 17:20			FF_Veh Inspection Form.pdf	Vehicle Inspection Form	Download	Edit
PDF	01/29/2024 17:13			VICTIM_WITNESS_STATEMENT.pdf	Victim witness statement	Download	Edit
PDF	03/26/2020 07:16			WinSOMS to iSOMS Conversion Notes.pdf	WinSOMS to iSOMS Conversion Notes.pdf	Download	Edit

MONTHLY EQUIPMENT INSPECTION FORM

Date:		Shift:	Inspected By:	ID #:
Officer Name & ID #		VEHICLE ID: (Make/Last 5 of Vin#)		
Current mileage:			Next oil change mileage:	
Oil Level:	Good <input type="checkbox"/>	<input type="checkbox"/> BELOW STANDARDS		
Transmission:	Good <input type="checkbox"/>	<input type="checkbox"/> BELOW STANDARDS	N/A <input type="checkbox"/>	
Tire	Good <input type="checkbox"/>	Ok <input type="checkbox"/>	Worn <input type="checkbox"/>	NEED REPLACING <input type="checkbox"/>



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For More Information

We hope this manual has been helpful to you and your agency.

If you have any questions, don't hesitate to call us at 888-644-5786.

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