



NextRequest Staff Reference Sheet

Welcome to NextRequest! The State of Iowa is using NextRequest to manage the public records request process. As a Staff user, you will be assisting with requests by locating responsive documents and uploading them to the system. This document covers all the actions that you will be taking in NextRequest:

- How to sign into your account
- How to know if you've been assigned to a request
- How to post a message to a request
- How to upload a document
- How to log hours spent on a request

How to Sign Into Your Account

You can access your account at any time by going to iowaopenrecords.nextrequest.com and clicking the Sign In link in the upper right. If you've signed in before, you can enter your email address and password now to access your account. If it's the first time you are logging in, you will need to activate your account. To do this follow these steps:

1. After clicking the Sign In link, click the link "Lost password / Can't sign in?"
2. Enter your email address and click the SUBMIT button
3. When prompted enter your password and confirm it
4. Find the confirmation email in your inbox (check your spam folder if you don't see it) and click the confirmation link

How to Know if You've Been Assigned to a Request

Depending on how your organization is using NextRequest, you may be either manually assigned to requests, or automatically assigned when the request is created or routed. In either case, you will receive an email notification when you are assigned to the request. To access a request from a notification, just click the orange button "View Request #XX-XXXX" and you will be taken directly to the request

You can also view a list of all requests assigned to you in NextRequest. To do this follow these steps:

1. Sign in to NextRequest
2. Click All Requests at the top of the screen
3. In the left-hand column under "My Requests", check the boxes next to "Point of Contact" and "Helper"



How to Post a Message to a Request

As part of helping fulfill a request you may need to post a message for other employees, for example to clarify what you are being asked to do or to give an update on the status of your work. As a Staff user all your messages are only viewable internally - none of your messages are visible to requesters. You can post a message in two different ways:

Post a message directly on a request. To do this follow these steps:

1. Sign in to NextRequest and go to the request you want to post a message about
2. Type your message in the box in the upper right and click the ADD MESSAGE button

Reply to an email notification about that request. If you reply to an email notification about a request, the contents of your email will be posted as an internal message on that request. Be sure that you are replying to a notification that is specific to that request, and not one of the daily digests covering multiple request.

How to Add a Document to a Request

The most common thing you will be asked to do is upload a document to a request. To do this follow these steps:

1. Sign in to NextRequest and go to the request you want to upload the document(s) to
2. Click the Add Document icon ()
3. Click the UPLOAD FILES button
4. Select the file(s) you would like to upload
5. (Optional) Enter a folder name to place the document(s) in
6. (Optional) Click the Edit icon () to add a Description and Document Date
7. Click the SAVE button

How to Redact a Document

Depending on the documents you are providing, you may need to redact them before they are released to the requester. You can redact PDF and other documents directly in NextRequest. To do so follow these steps:

1. Locate the document you want to redact in the 'Documents' section on the left.
2. Click the Wrench icon ()
3. Click the Redact button in the top left of the viewer
4. Redact the document using the following options:
 -  : select text to redact
 -  : select page(s) to redact



-  : select rectangle to redact
 - Click the 'Search' button to search and redact all instances of a word or phrase
 - Click the triangle (▼) in the search field to search and redact categories of information (Date, USA Postal Code, Email, Phone, and SSN)
5. Click Save in the top right
 6. Click Save to Request. A new, redacted copy of the document will be saved on the request. The unredacted version will not be affected.

How to Mark a Task as Complete in NextRequest

Depending on how your department is organizing work to be done, you may be assigned specific tasks to do. You will receive a notification email when you have been assigned to the task. The email will include a link that you can click to go directly to the corresponding request. You can view the tasks assigned to you in two places:

- To view all tasks on a particular request, open the request and look in the Tasks section in the lower left
- To view all tasks that have been assigned to you across all requests click the TASKS link in the portal header

When you have completed a task you can mark it as done by locating it on the request screen and clicking the box to the left (☐).

How to Log Hours Spent on a Request

Depending on your organization's policy, you may be asked to log the time you spend on a request. To do this follow these steps:

1. Sign in to NextRequest and go to the request that you want to log hours for
2. Click the Log Hours icon ()
3. Enter the time spent and a description of what you were doing
4. Click the ENTER HOURS button