Guide for Department Administrators

As a Department Administrator you can input and update information specifically for your department and users. In addition to managing the accounts of your department users, you can also add Alerts, Templates, Redaction Reasons, and Tags.

Each Department Administrator can only edit their own department and users. Department Administrators can however edit Alerts, Templates, Redaction Reasons, and Tags for all departments. Please be considerate of other departments and do not edit their information. Use a prefix in the titles of Templates, Redaction Reasons, and Tags to indicate that they are for your department and do not edit ones with another department's prefix. See the section on Alerts for specific instructions for managing Alerts for your own and other departments.

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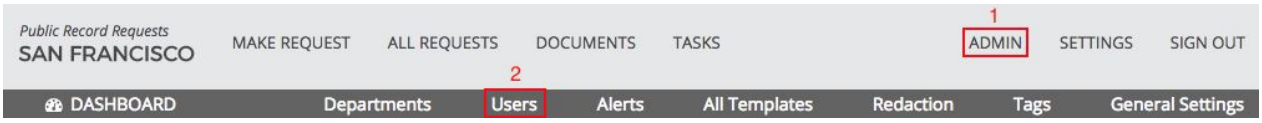
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How to Add and Manage User Accounts



There are two parts to adding a new user to NextRequest: creating the new user account in the system and adding them to your department. For information about how to add a user to your department see the next section "How to Manage Your Department" Once a user has been added to the portal they can be edited or deactivated at any time. Users cannot be fully deleted, however deactivating the user will remove them from all the user lists within the application.

Adding a new user account

1. Click the ADMIN link in the header
2. Click the User link in the sub-header
3. Click the CREATE USER button
4. Enter information for the user, including their name, title, and email
5. Select the user's role
    - Staff: Can upload documents, send internal messages, log hours, and create and fulfill tasks. Staff cannot take any action which is visible to the requester.
    - Publisher: Can do everything Staff can do as well as message the requester, release documents, change due dates, and publish and close requests.
    - Guest: All requesters have guest accounts. Guests can only see publicly accessible requests and information, as well as additional information for requests they submitted.
6. Click the SAVE button

Editing a user account

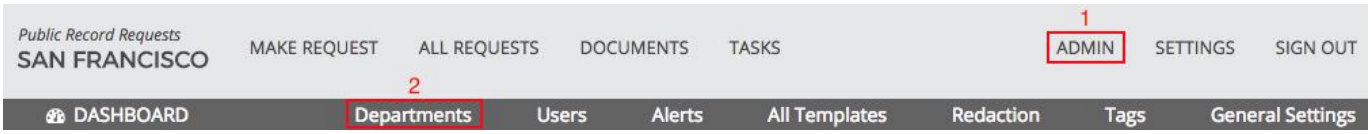
To edit an existing user account, locate that account in the user list, then click the Edit icon ( ) in line on the right. Make any updates that you want to the user information, then click the SAVE button.

Deactivating and reactivating a user account

Deactivating a user account will hide them in all user selection lists within the application. Deactivated users will still be shown as assigned to requests that they were added to before they were deactivated

To deactivate a user account, locate that account in the user list, click the DEACTIVATE button on the far right, then OK to confirm. To reactivate an account locate the account, in the user list (you'll need to click the toggle "Show deactivated users" under the search box), then click the ACTIVATE button.

How to Manage Your Department



After users have been created you can add them to your department as either the Point of Contact or support staff. The Point of Contact has primary responsibility for all new requests that are assigned to your department. There can only be one default Point of Contact for the department however the Point of Contact can be changed for an individual request at any time.

You can set support staff in your department to be automatically assigned to all new requests. Any user who is not set to be auto-assigned will be need to be manually added to individual requests. Be sure to add all of your users to your department. Otherwise they will not be able to access department requests.

Adding a user as support staff to your department

1. Click the ADMIN link in the header
2. Click the Departments link in the sub-header
3. Click the Edit icon ( ) next to your department (only your department will be editable)
4. Click the ADD STAFF button
5. Click the box "Type a staff name or email" and enter the user you want to add and/or select the user from the drop-down list
6. (Optional) Check the box "Assign as Support Staff to all requests assigned to this department": these staff will automatically be assigned as Support Staff to all requests that are assigned to your department. Department members who are not auto-assigned to requests will still be able to view all requests assigned to the department but will not receive notifications about the request.
7. Click the SAVE button

Changing the Point of Contact for your department

1. Click the ADMIN link in the header
2. Click the Departments link in the sub-header
3. Click the Edit icon ( ) next to your department (only your department will be editable)
4. Select a new user from the Point of Contact drop-down
5. Click the SAVE button

Removing a user from your department

To remove a user from your department, open your department for editing and click the Remove button next to the user you want to remove, then click OK to confirm. If the user will no longer be working in the NextRequest portal you should also deactivate their account (see previous section "How to Add and Manage User Accounts."

How to Add and Manage Alerts



You can set up alerts to display instructions based on a particular word or phrase that a requester types. This can help route requesters to the information they're looking for before they make request their request, saving time for everyone. This information might be a page that is already on your website or a department that processes public records requests outside of the NextRequest portal.

Although you will have access in the portal to all department alerts, you should only edit alerts for your own department. The exception to this is if an alert has already been created for the exact keyword(s) that you want to use. An example would be if another department has created an alert for just the word 'budget' with information about how to access their department's budget online. If you would like to display additional information tied to the word "budget", you can your department's information to the existing alert. Do not edit or delete the existing alert text. If your keywords are not an exact match for an existing alert (for example you want to create an alert for "budget | financial" and there's already an alert for just "budget") then you should create a new alert.

Creating an Alert

1. Click the ADMIN link in the header
2. Click the Alerts link in the sub-header
3. Click the Create Alert button
4. Enter the words and/or phrases in the Keywords box that you would like to trigger the alert, separated by a pipe: | (usually found on the same key as \)
    - Example: to trigger an alert for the words "birth," "death," and "certificate", enter 'birth|death|certificate'
5. Enter text of the alert. This text will display below the request description if the associated keyword is detected
6. Click the SAVE button

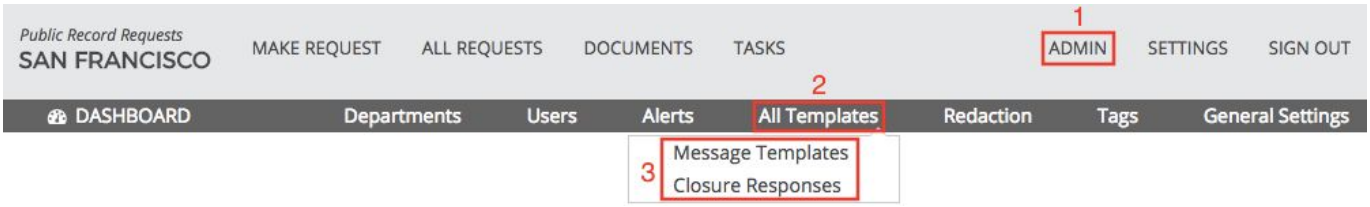
Editing an Alert

To edit an existing Alert, locate it in the Alerts list, then click the Edit icon ( ) inline on the right. Make any edits you want to the Alert keyword(s) or text, then click the SAVE button. If you are adding your own text to an existing Alert be careful not to edit or delete the existing Alert text.

Deleting an Alert

To delete an existing Alert, locate it in the Alerts list, click the Delete icon (✖) inline on the right, then click OK to confirm. Only delete Alerts that are for your department.

How to Add and Manage Templates



You can save time by creating templates of common responses that you use when working on a request. Templates can be edited after they've been added to a request message and multiple templates can be used in a single message. General templates will be added for use by any department. You can also create additional templates which are specific to your department. When naming templates use a prefix that indicates it is for your department (for example 'DPH:' or 'PD:').

Although you will have access in the portal to templates for all departments, you should only edit templates for your own department. In addition, do not select any template as Initial Contact.

There are two types of templates in NextRequest:

- **Message Templates**: these are templates for sending a message either to the requester or internally while the request is being worked on. The content of an external message, including any templates used, will be included in the email notification sent to the requester.
- **Closure Responses**: these are templates for telling the requester why and how their request is being closed. The closure response template includes both the reason the response was closed and the text explaining this to the requester. You can include the closure reason in reports to track what percentage of requests are being closed for each reason. The content of a closure response is not included in the email notification sent to the requester telling them that their request has been closed. Any information that you would like the requester to receive in an email should be included in an external message and (optionally) a message template.

Adding a Template

1. Click the ADMIN link in the header
2. Click All Templates in the sub-header
3. Click Message Templates in the drop-down menu
4. Click the CREATE TEMPLATE button
5. Enter the Name and Template Text for the template
    - When naming templates use a prefix that indicates your department (for example 'DPH:' or 'PD:')
6. Click the SAVE button

Adding a Closure Response

1. Click the ADMIN link in the header
2. Click All Templates in the sub-header
3. Click Closure Responses in the drop-down menu
4. Click the CREATE CLOSURE RESPONSE button
5. Enter the Name and Closure Response Text for the closure response
    - When naming templates use a prefix that indicates your department (for example 'DPH:' or 'PD:')
6. Click the SAVE button

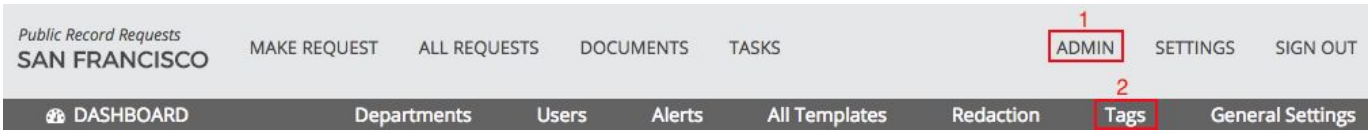
Editing a Message Template or Closure Response

To edit an existing template, locate that template in the Message Template or Closure Response list, then click the Edit icon () inline on the right. Make any updates that you want to the template information, then click the SAVE button. Only edit templates that are for your department.

Deleting a Message Template or Closure Response

To delete a template, locate that template in the Message Template or Closure Response list, then click the Delete icon (✖) inline on the right. Click OK to confirm deletion. Only delete templates that are for your department.

How to Add and Manage Tags



You can use tags to categorize your department's requests by any criteria you prefer. Some tags may be created for use by all participating departments (ex: media, emails, etc). You can create additional tags that are specific to your department's programs and priorities. When naming tags use a prefix that indicates your department (for example DPH:' or PD:'). You can edit a tag after it has been created as well as delete it if the tag has not yet been added to a request. Although you will have access to tags for all departments, you should only edit or delete tags for your own department.

Adding a Tag

1. Click the ADMIN link in the header
2. Click the Tags link in the sub-header
3. Click the CREATE TAG button
4. Enter a tag name and (optional) description
    - When naming tags use a prefix that indicates your department (for example 'DPH:' or 'PD:')
5. Click the SAVE button

Editing a Tag

To edit an existing tag, locate it in the tags list, then click the Edit icon ( ) to the right of the tag name. Make any updates that you want to the tag name and description, then click the SAVE button. Only edit tags that are for your department.

Deleting a Tag

To delete an existing tag, locate it in the tags list, click the Delete icon (✖) to the right of the tag name, then click OK to confirm. Only tags that have not been added to a request can be deleted. Only delete tags that are for your department.