Office of the Secretary of the Commonwealth of Massachusetts

User Guide

Agency Public Records Request Database

What is the Agency Public Records Request Database?

Effective January 1, 2017, all Massachusetts agencies are required to publish summaries of requests for public records. The Agency Public Records Request Database website provides agencies with a toll to create online user accounts and post the required documents.

The public records request information that is recorded by agencies will be reported annually to the legislature by the Public Records Division. In addition, all public records requests will be made available for viewing by the general public from the Secretary of the Commonwealth's website.

Each Agency designates an individual as the primary Records Access Officer (RAO). Once approved, the primary RAO can create multiple accounts for additional users within the agency. Only users with an account can use the online system to enter request details.

This user guide covers the following topics:

Getting started…

What you need to know about the online Agency Public Records Request Database website.

User account types

To access the website, agency RAOs must have an account created through the website. Once you create an account, you gain access to a secure area that provides the specific links you need to manage your account.

User accounts have a unique user name and email address

There are two types of agency user accounts, they are "Primary RAOs" and all other RAOs (also called "Secondary RAOs").

Primary RAO user account

Each agency will designate one RAO to be the "Primary RAO" and be responsible for creating additional agency RAO user accounts. A Primary RAO can

Only one Primary RAO user account per agency

- Request Primary RAO user account approval from the Public Records Division
- Create as many agency RAO user accounts ("Secondary RAO" user accounts) as needed once approved by the Public Records Division
- Secondary RAO user accounts do not require approval by the Public Records Division
- RAO can activate or inactivate Secondary RAO user accounts

When creating a Primary RAO account, contact the Public Records Division if you don't receive your sign-in credentials within 5 days

All RAO user accounts

Each agency RAO can sign into the Agency Public Records Request Database website and use the Main Menu to:

- Create and update public record request summaries
- Search for public record request summaries
- Edit your user account (email and phone number only)
- Change your password

Email communication

The email address information entered for each user account is preserved in the website and used to communicate messages including user account sign-in credentials, user creation acknowledgements, and forgotten user names and passwords.

Be sure your email is accurate!

If you have any questions about email addresses, or you think you are not receiving email notifications, contact the Public Records Division at 617-727-2832 for assistance.

User names and passwords

Your account is secure and can only be accessed by your user name and password.

User name

- Use a combination of 6 to 20 letters **and** numbers
- **Start** with a letter
- Do **not** use your email address as your user name

Password

- Use a minimum of 8 characters
- Use a letters, numbers, and special characters
- Use at least 1 number, 1 lower case letter, and 1 capital case letter

User names **are not** case sensitive

Passwords **are** case sensitive

More on passwords

- A system-generated password will be sent to your email address. When you receive your system-generated password, change it by selecting the change password link (found at the top of most screens).
- Your user name and password are saved by the system. If you cannot locate your user name or password, select the links on the sign-in screen to obtain your recent credentials.

Signing into the website

On the sign-in screen, enter your **user name** and **password** and select **Sign in**. The Main Menu will display along with your user name.

- If you cannot access the Main Menu, a password conflict may be the cause
- Use the password links to retrieve your user name or password
- If this doesn't help and repeated attempts to sign in fail, contact the Public Records Division at 617-727-2832
- Alternatively, email the Public Records Division at RAOManagerAdmin@sec.state.ma.us

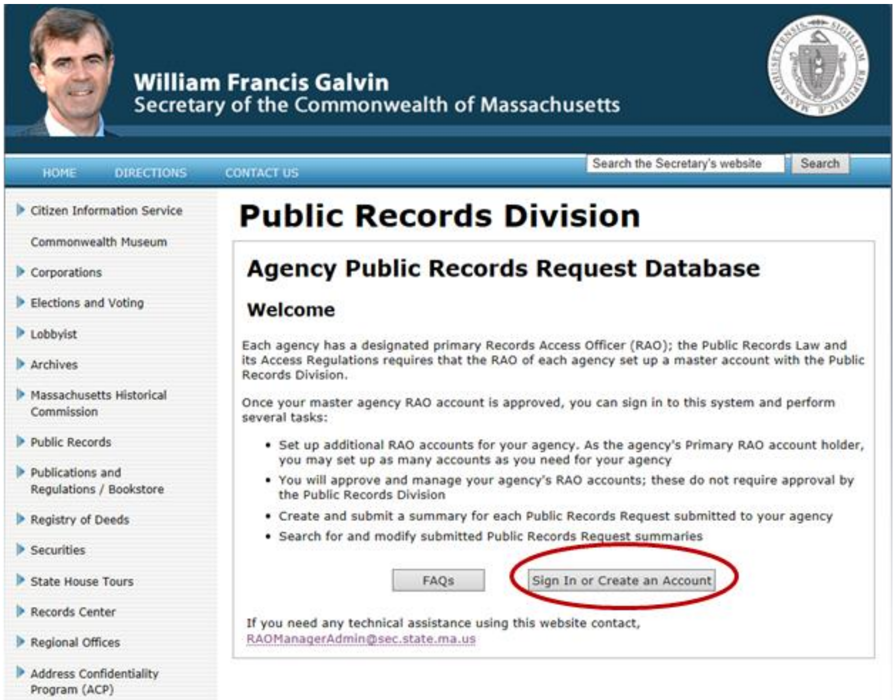
If you experience difficulty signing into your account, **do not create another account.**

Contact the Public Records Division for assistance.

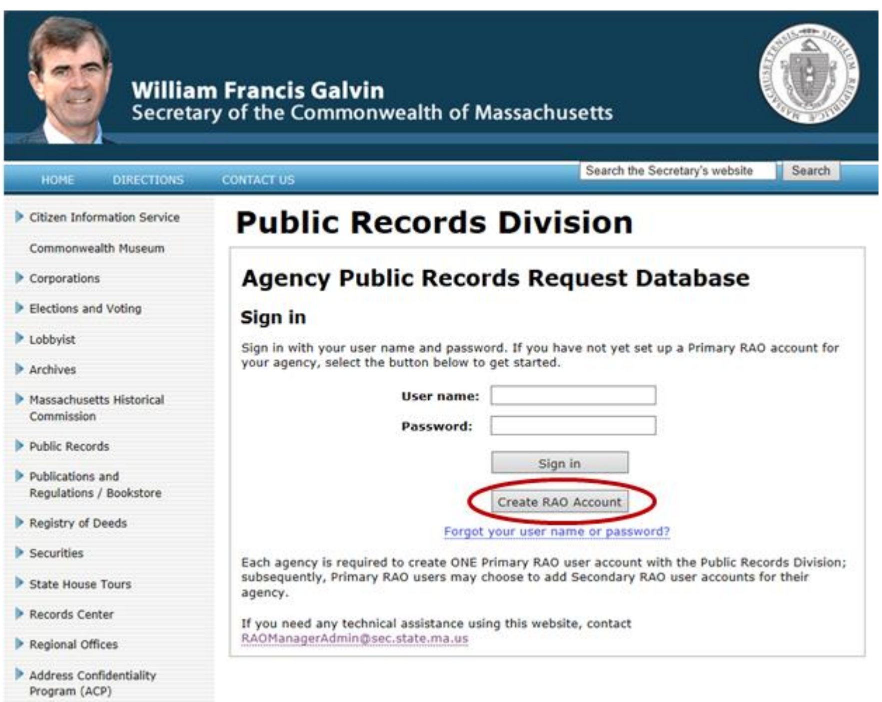
Agency Public Records Request Database Website URL:
https://www.sec.state.ma.us/AgencyRAOWeb/RAOAccounts/Welcome.aspx

Create a Primary RAO user account

Step 1: Select **Sign in or Create an Account** from the main sign-in screen

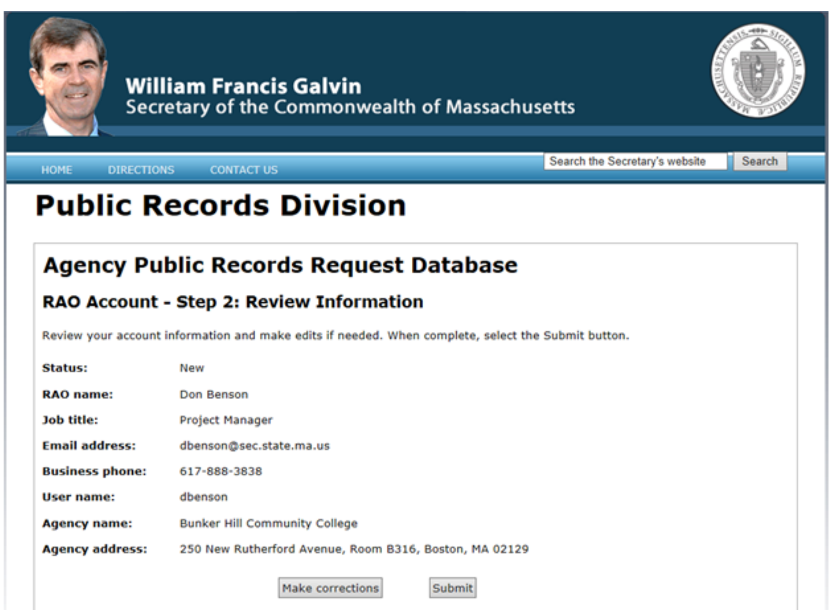


Step 2: Select **Create RAO Account**

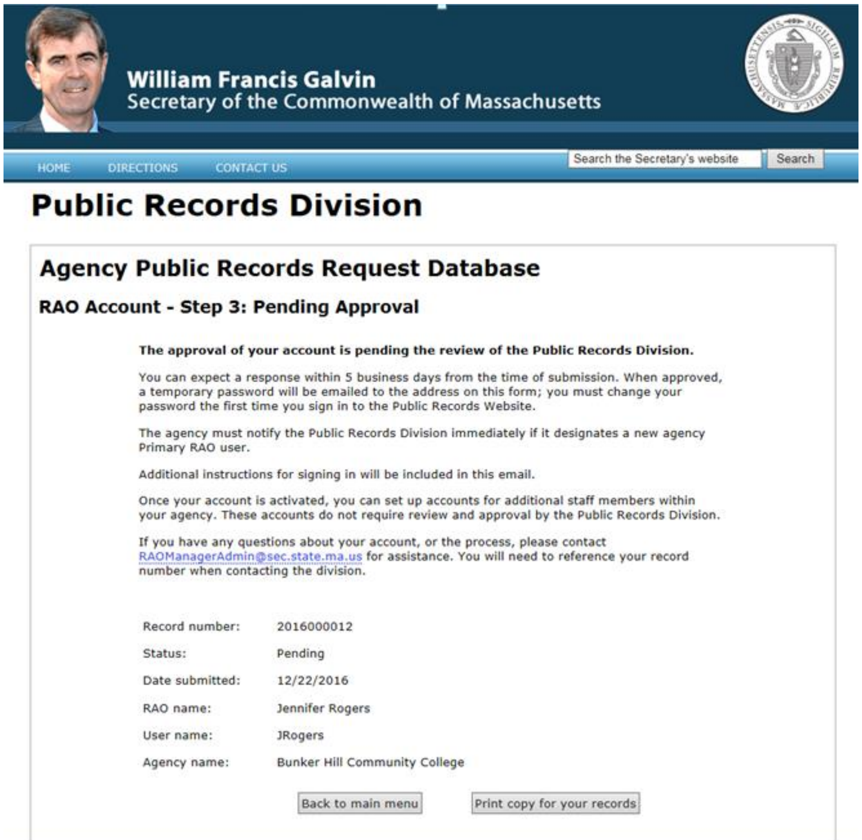


Step 3: Enter your user account information and select **Review information**

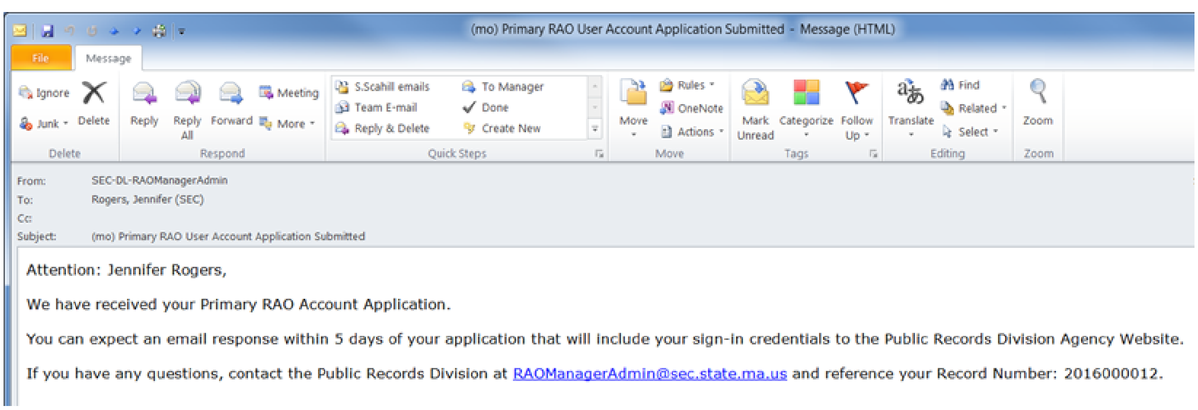
Step 4: Review your user account information and select **Submit**



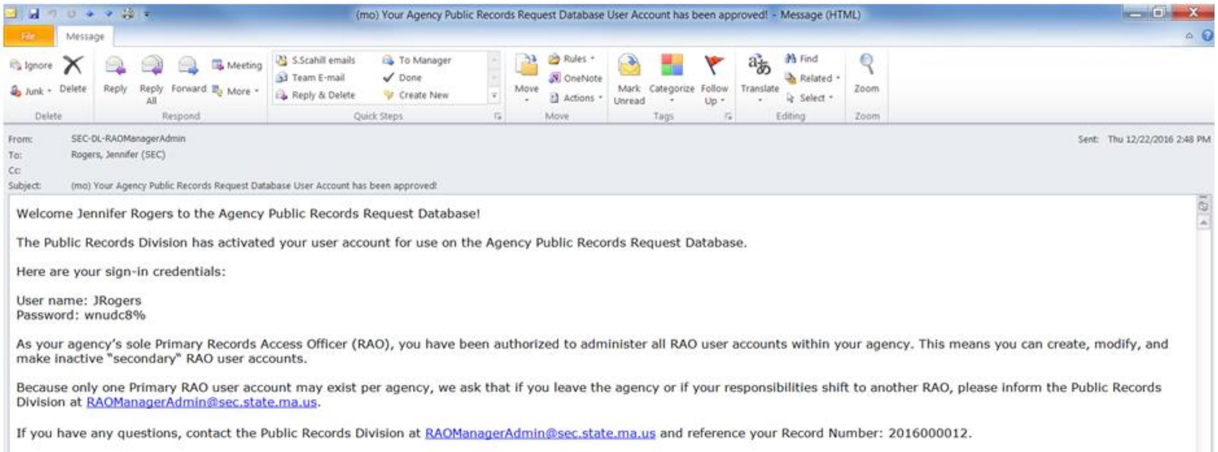
Step 5: The approval of your account is pending review by the Public Records Division. (Note: This may take up to five business days.) Select **Back to the main menu**.



Step 6: You'll receive a **confirmation of receipt** at your email address



Step 7: After the Public Records Division approves your account, you'll receive an approval confirmation with your sign-in credentials. (Note: This is a temporary password. Use it to sign-in for the first time. Use the **Change password** link at the top of the page to make the change.)



(mo) Your Agency Public Records Request Database User Account has been approved! - Message (HTML)

From: SEC-DL-RAOManagerAdmin
To: Rogers, Jennifer (SEC)
Cc:
Subject: (mo) Your Agency Public Records Request Database User Account has been approved!
Sent: Thu 12/22/2016 2:48 PM

Welcome Jennifer Rogers to the Agency Public Records Request Database!

The Public Records Division has activated your user account for use on the Agency Public Records Request Database.

Here are your sign-in credentials:

User name: JRogers
Password: wnudc8%

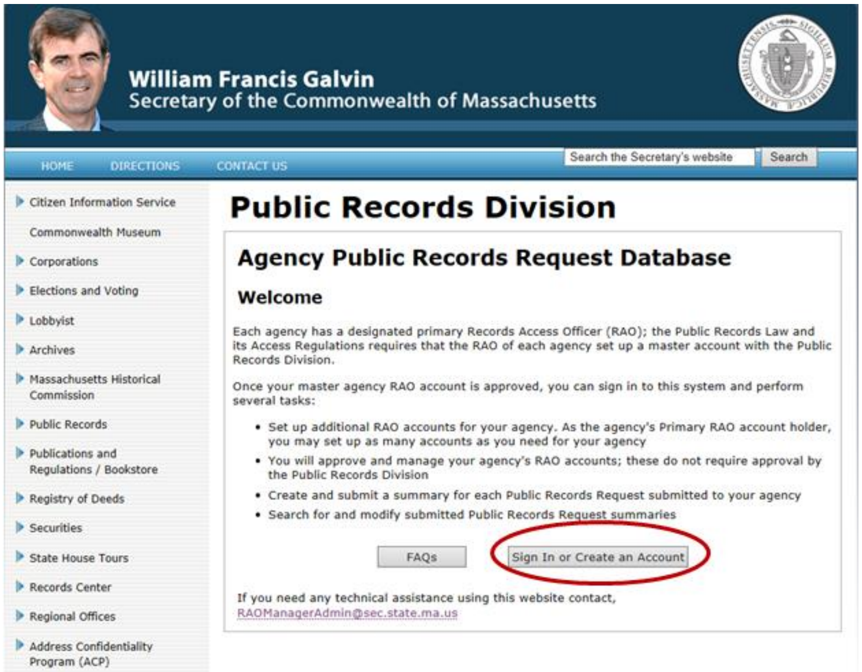
As your agency's sole Primary Records Access Officer (RAO), you have been authorized to administer all RAO user accounts within your agency. This means you can create, modify, and make inactive "secondary" RAO user accounts.

Because only one Primary RAO user account may exist per agency, we ask that if you leave the agency or if your responsibilities shift to another RAO, please inform the Public Records Division at RAOManagerAdmin@sec.state.ma.us.

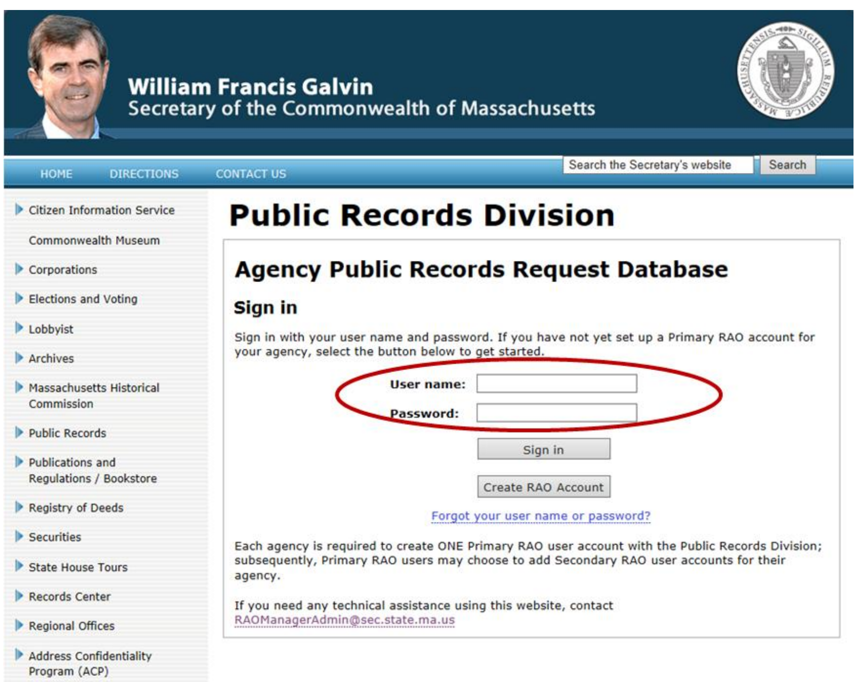
If you have any questions, contact the Public Records Division at RAOManagerAdmin@sec.state.ma.us and reference your Record Number: 2016000012.

Create a Secondary RAO user account

Step 1: Select **Sign in or Create an Account** from the main sign-in screen

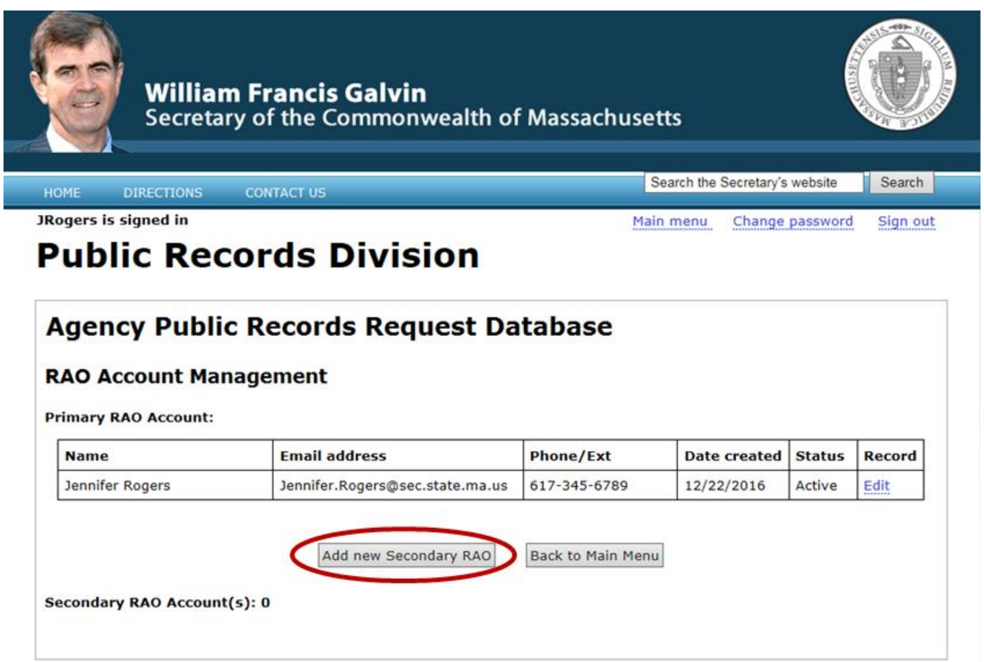


Step 2: Enter your user name and password



Step 3: Select **Add or update agency RAO accounts**

Step 4: Select **Add new Secondary RAO.** (Note: Secondary RAOs do not require approval by the Public Records Division. The Primary RAO can set up as many Secondary RAO accounts as needed. The Primary RAO can also activate or inactivate Secondary RAO accounts.)



Step 5: Enter Secondary RAO user account information and select **Save and Continue**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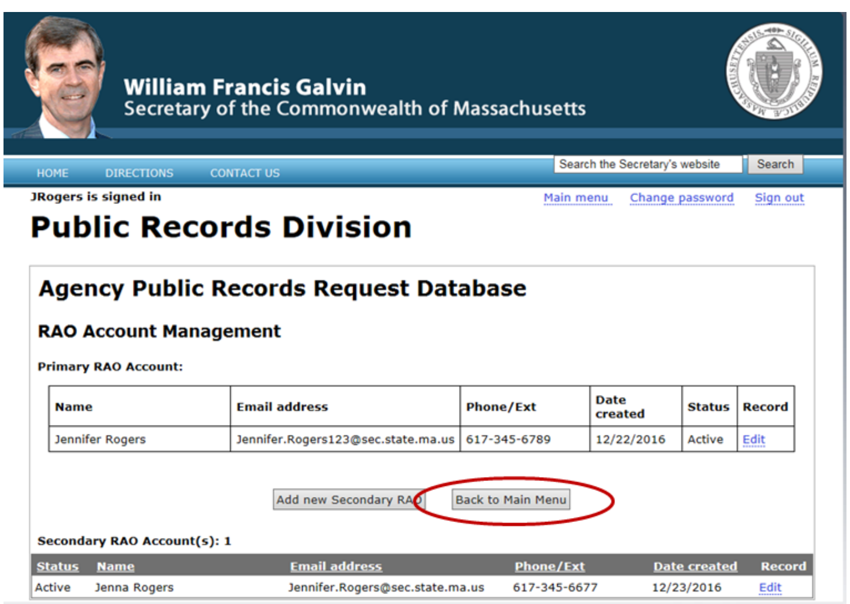
RAO Account Management - New

Status:	Active Inactive
First name:	
Middle name: (optional)	
Last name:	
Title: (optional)	
Create a user name:	
Email address:	
Phone:	
Extension: (optional)	
Agency name:	Bunker Hill Community College
Agency street address 1:	250 New Rutherford Avenue, Room B316
Agency street address 2: (optional)	
Agency city or town:	Boston
Agency state:	Massachusetts
Agency zip code:	02129

Save and Continue Cancel Clear

Step 6: New Secondary RAO account is displayed, select **Back to Main Menu**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RAO Account Management

Primary RAO Account:

Name	Email address	Phone/Ext	Date created	Status	Record
Jennifer Rogers	Jennifer.Rogers123@sec.state.ma.us	617-345-6789	12/22/2016	Active	Edit

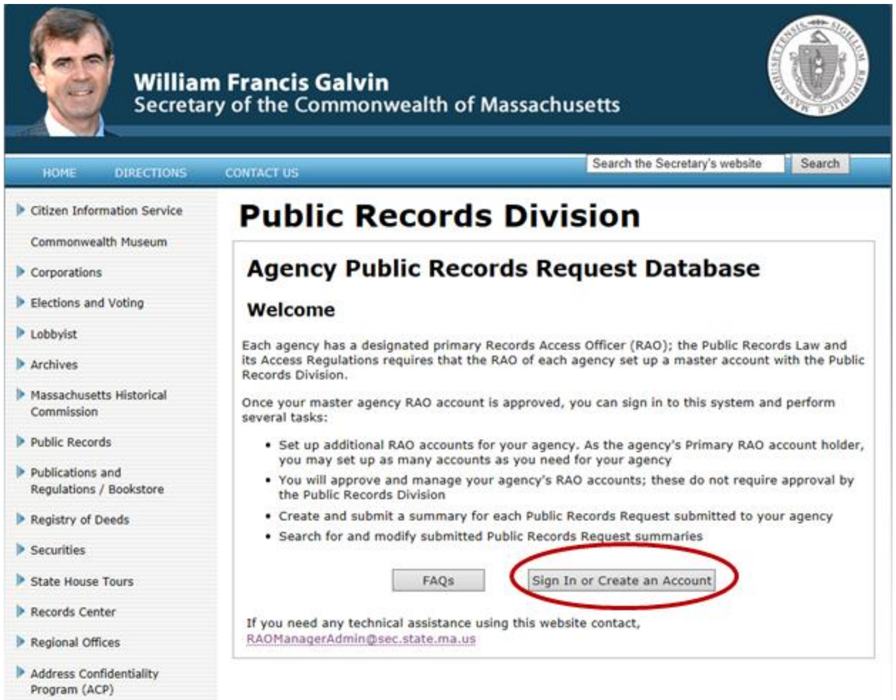
Add new Secondary RAO Back to Main Menu

Secondary RAO Account(s): 1

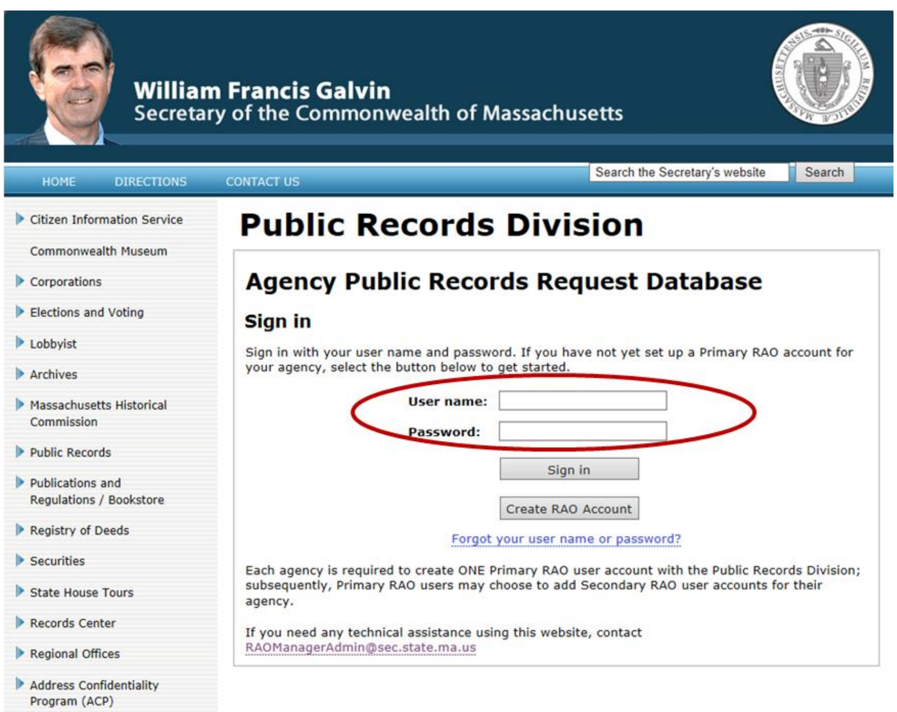
Status	Name	Email address	Phone/Ext	Date created	Record
Active	Jenna Rogers	Jennifer.Rogers@sec.state.ma.us	617-345-6677	12/23/2016	Edit

Update your user account (signed in as a Secondary RAO)

Step 1: Select **Sign in or Create an Account** from the main sign-in screen



Step 2: Enter your user name and password

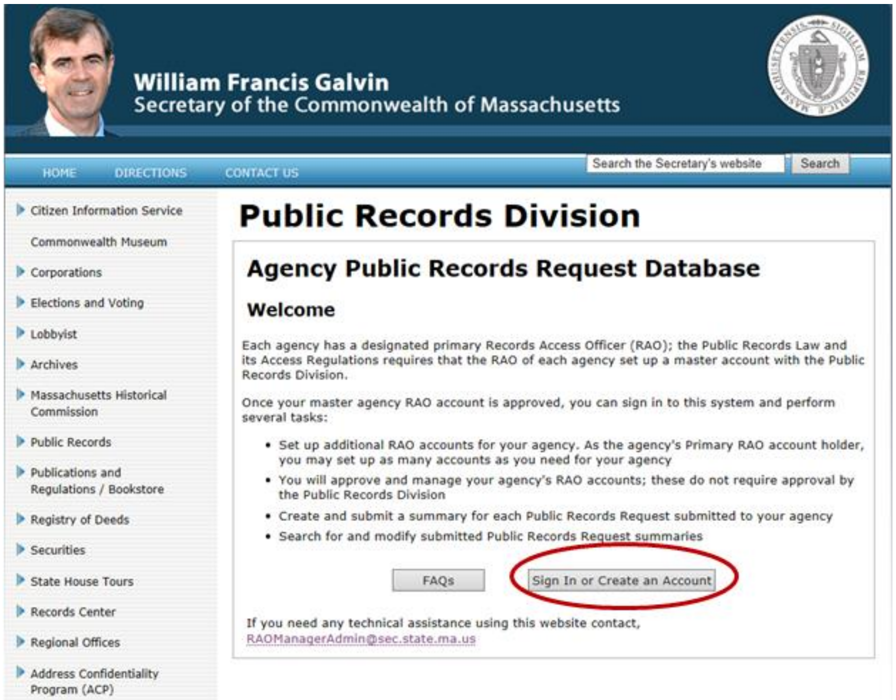


Step 3: Select **Update my account information**

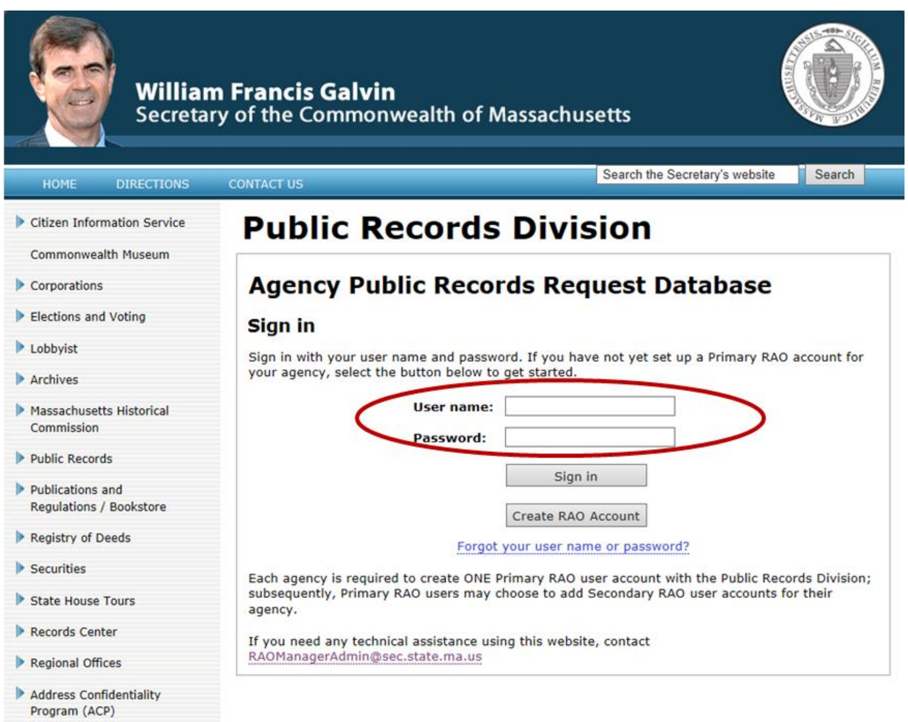
Step 4: Update user account information and select **Save and Continue**

Create a Public Records request detail record

Step 1: Select **Sign in or Create an Account** from the main sign-in screen

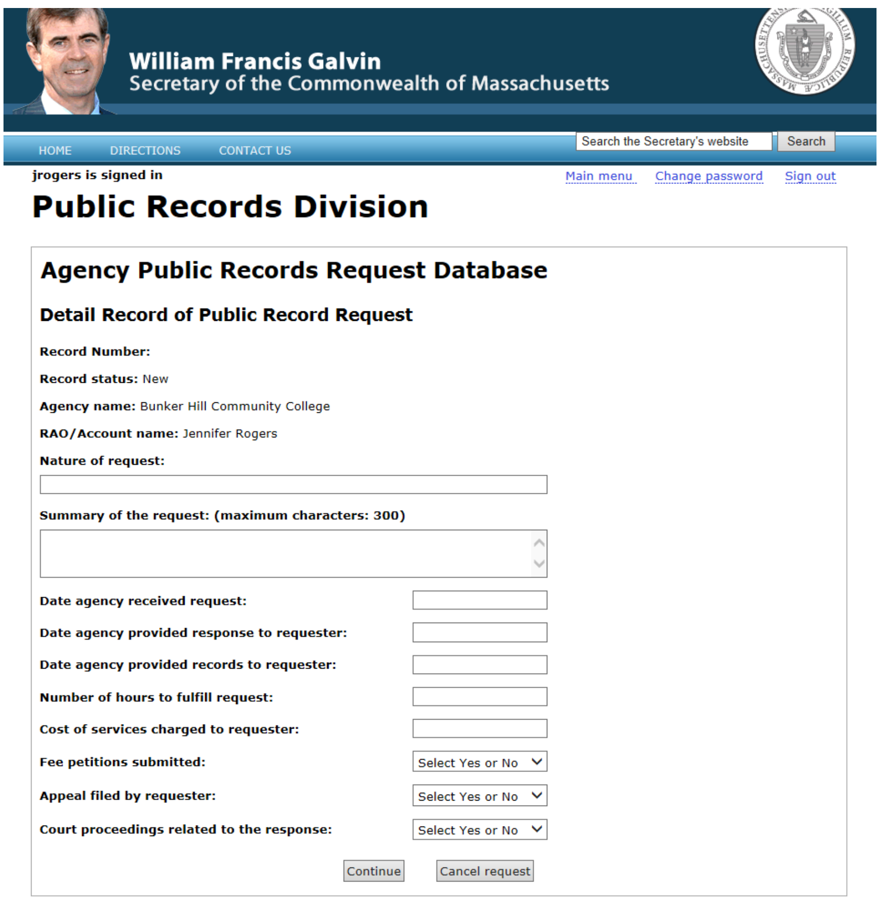


Step 2: Enter user name and password



Step 3: Select **Add new Public Records request detail record**

Step 4: Enter request detail information and select **Continue**



Step 5: Review request detail information and select **Submit**

Step 6: Review request detail record and select **Yes, submit detail record**

Step 7: Review submittal confirmation and select **Back to Search**

Search, view, and edit Public Records request detail record

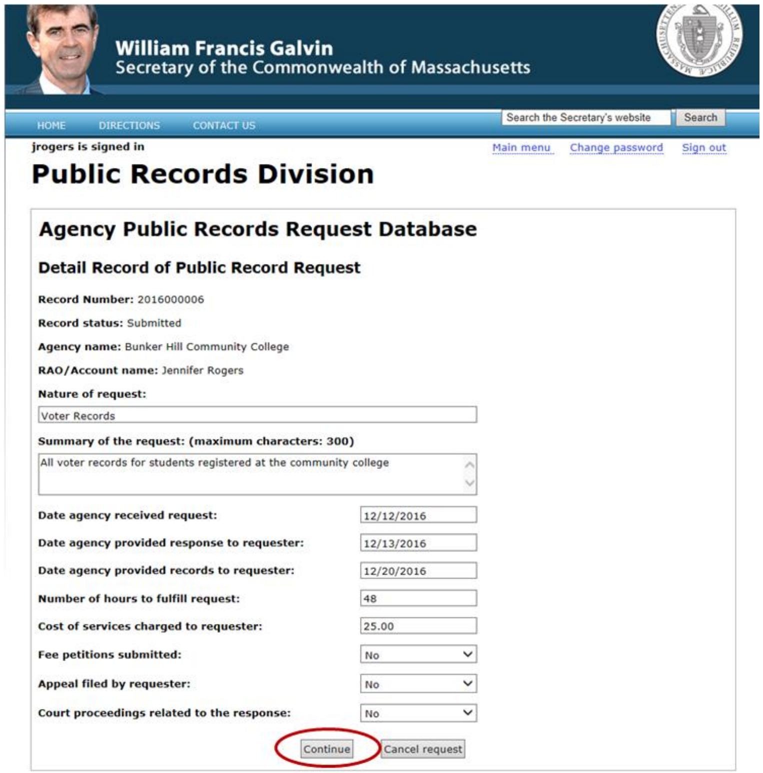
Step 1: Select **Search for Public Records request detail record** from the main menu

Step 2: Select one or more filters and select **Search**

Step 3: Search results are returned, select **Record No** to view request record details

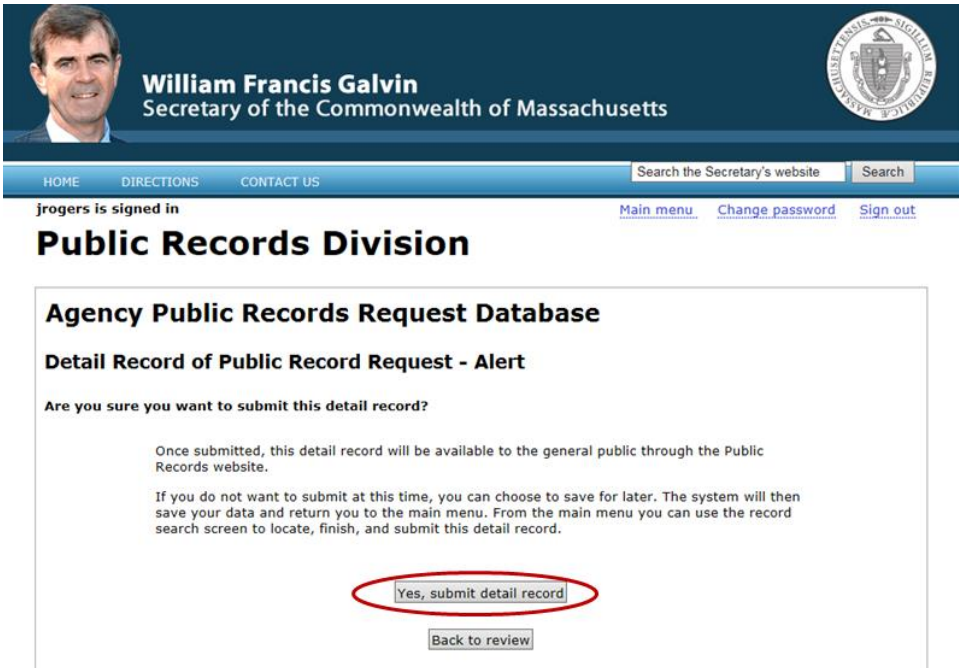
Step 4: View the request detail record and select **Back to search results,** alternatively, select **Edit Record** to make a change

Step 5: Edit the request detail records and select **Continue.** (Note: Edit request detail record as needed.)



Step 6: Review request detail information and select **Submit**

Step 7: Review request detail record and select **Yes, submit detail record**

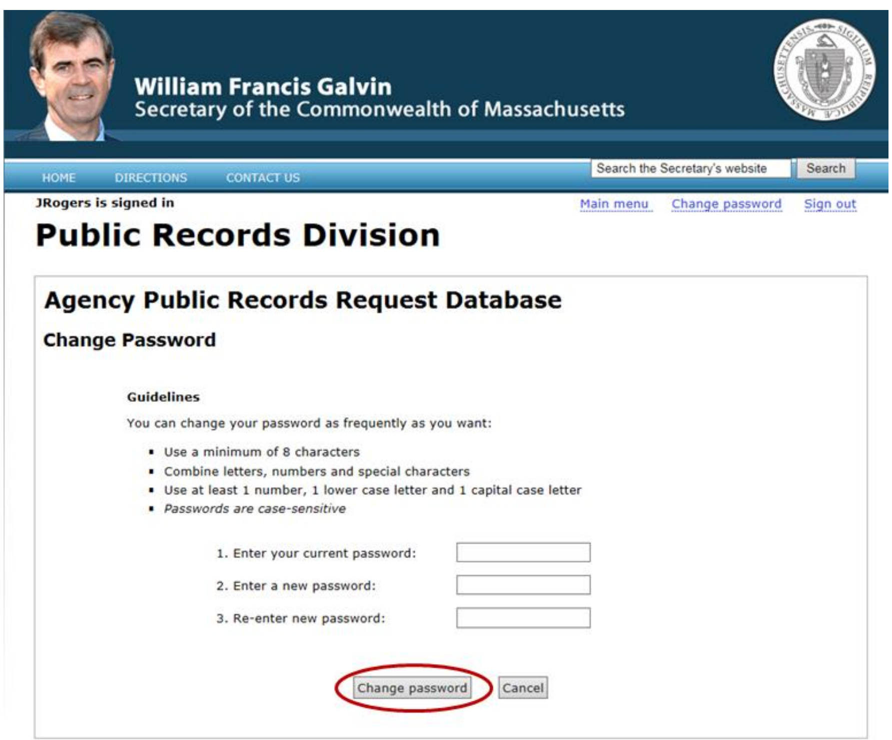


Step 8: Review submittal confirmation and select **Back to Search**

Change password

Step 1: Select **Change password** from the sub-menu

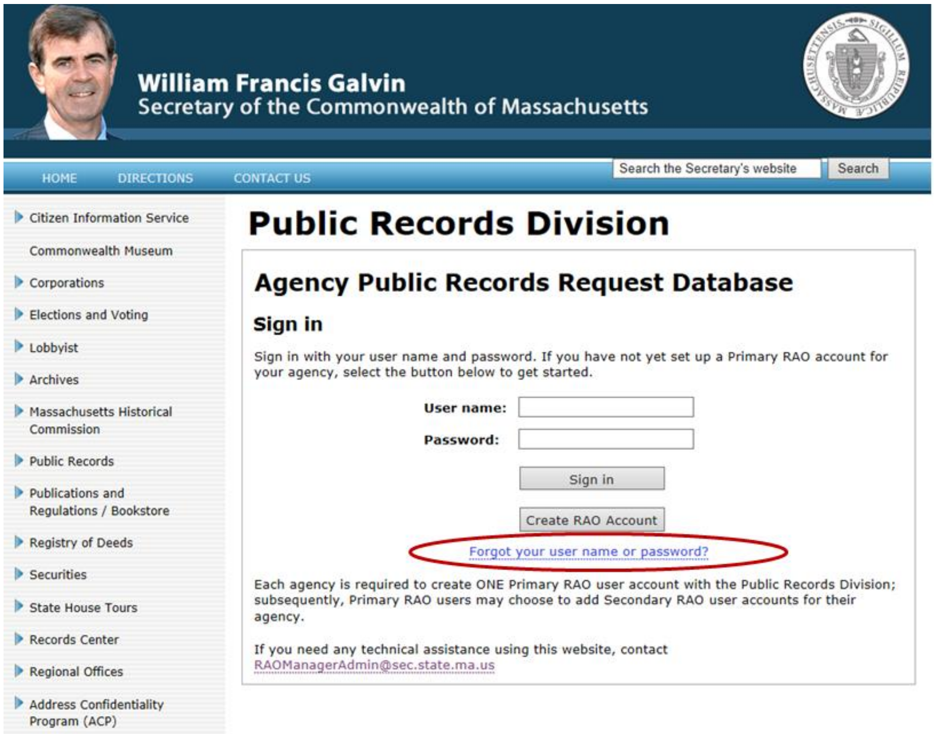
Step 2: Enter old and new password and select **Change password**



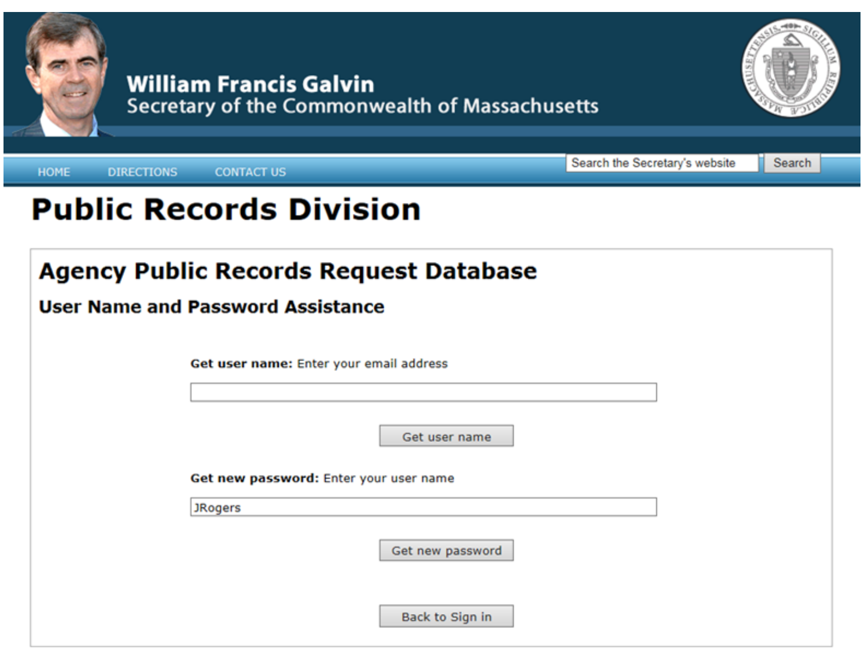
Step 3: Select **Return to main menu**

Forget user name or password

Step 1: Select **Forget your user name or password?** link

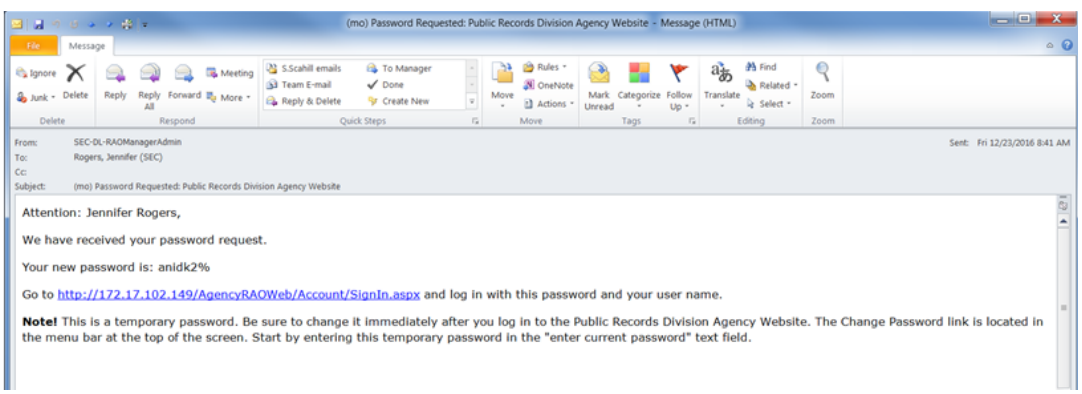


Step 2: Enter password (or user name as the case may be) and select the appropriate "Get" button



Step 3: Select **Back to Sign in**

Step 4: You'll receive your password (or user name) at your primary email address



Upload request detail tracked outside of the system (bulk upload)

Overview

Three steps are involved when uploading bulk requests from an Excel spreadsheet.

Step 1: Upload request data from an Excel file into the "preview" grid

The "preview" grid acts as a staging area where you can resolve Excel file errors, duplicates found within the Excel file, and duplicates found between the Excel file and the Request Database.

Step 2: Resolve errors and duplicates (as needed)

From the preview grid, each request can be brought into an editor where fields in error can be changed or deleted.

Step 3: Submit requests to the Request Database

Move requests from the preview grid to the Request Database.

Only after all errors and duplicates have been resolved can requests be submitted to the Request Database.

Step 1: Upload request data from Excel into the “preview” grid

Task A: Navigate to the Upload a Request File page

From the Main Menu, select **Upload request detail tracked outside of the system** link

Upload a Request File is displayed

Task B: Upload an Excel file into the preview grid

Select the **Browse** button to navigate to the Excel spreadsheet

Select the year from the **Select the year the requests were received** drop down

Select the **Upload requests** button to upload the Excel file request into the preview grid

Preview grid displays

Step 2: Resolve errors and duplicates (as needed)

Errors and duplicates rules and general instructions

Only after all errors and duplicates have been resolved can requests be submitted to the Request Database.

Resolve errors

- Errors are listed when the content does not match the expected format
- Errors are flagged to the right of each request in the preview grid under the Error column

Resolve duplicates

- Select the **View duplicates** button
- Duplicates are listed when found a) within the Excel file and b) between the preview grid and the Request Database
- Duplicates are determined by comparing these fields
  - Nature of request
  - The date on which the request was received
  - The date on which a response is provided to the requestor
  - The date on which a public record is provided to the requestor

Edit/delete requests

- Each request in the preview grid is hyperlinked to an editing routine
- In the edit routine, the request fields can be changed or deleted
- Errors are displayed in the edit routine
- Note: Although the Upload routine provides editing and deleting capability, when many changes are required, it's advisable to edit the original Excel file and re-upload the data

Only one date per date field rule

Only one date per date field is valid. This rule applies to all date fields.

The date on which a response is provided to the requestor date field rule

For the "The date on which a response is provided to the requestor" date field, the single date agencies are to report should be the date they began providing responsive records to the requestor.

Excel file naming convention rule

The Excel file name should only include numbers and alphabetic characters. Hyphens and underscores may also be used. The file name should NOT include special characters, punctuation (periods, commas, apostrophes), or spaces. An example of a properly named Excel file is: DeptofHealth2017.xlsx.

Task A: Resolve column names that do not match the Excel template

The Excel Request template must be strictly observed in terms of content and format. Column header names must be as expected and defined in the Excel Request template.

See Agency Records Request Website Upload Template Excel file and user guide.

Task B: Resolve Excel formatting errors

After uploading the Excel file into the preview grid, errors may be displayed.

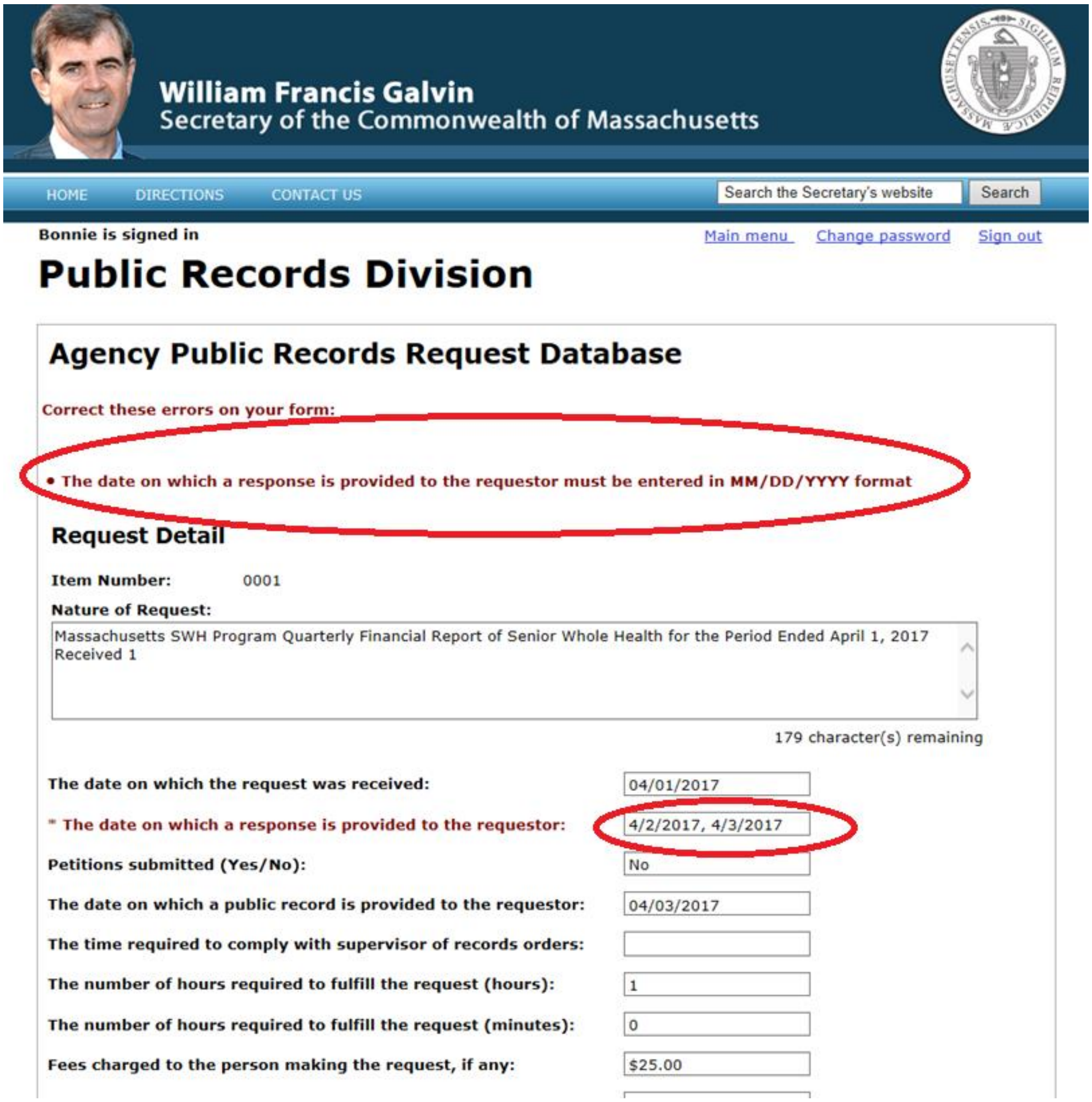
Select the **Item** number to open each request using the detail editor.

Edit request record – change date

Correct the date on which a response is provided to the requestor

The date must be entered in MM/DD/YYYY format and only one date can be entered into the field (see **Only one date per date field rule**)

Make the change and select the **Save** button



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Correct these errors on your form:

- The date on which a response is provided to the requestor must be entered in MM/DD/YYYY format

Request Detail

Item Number: 0001

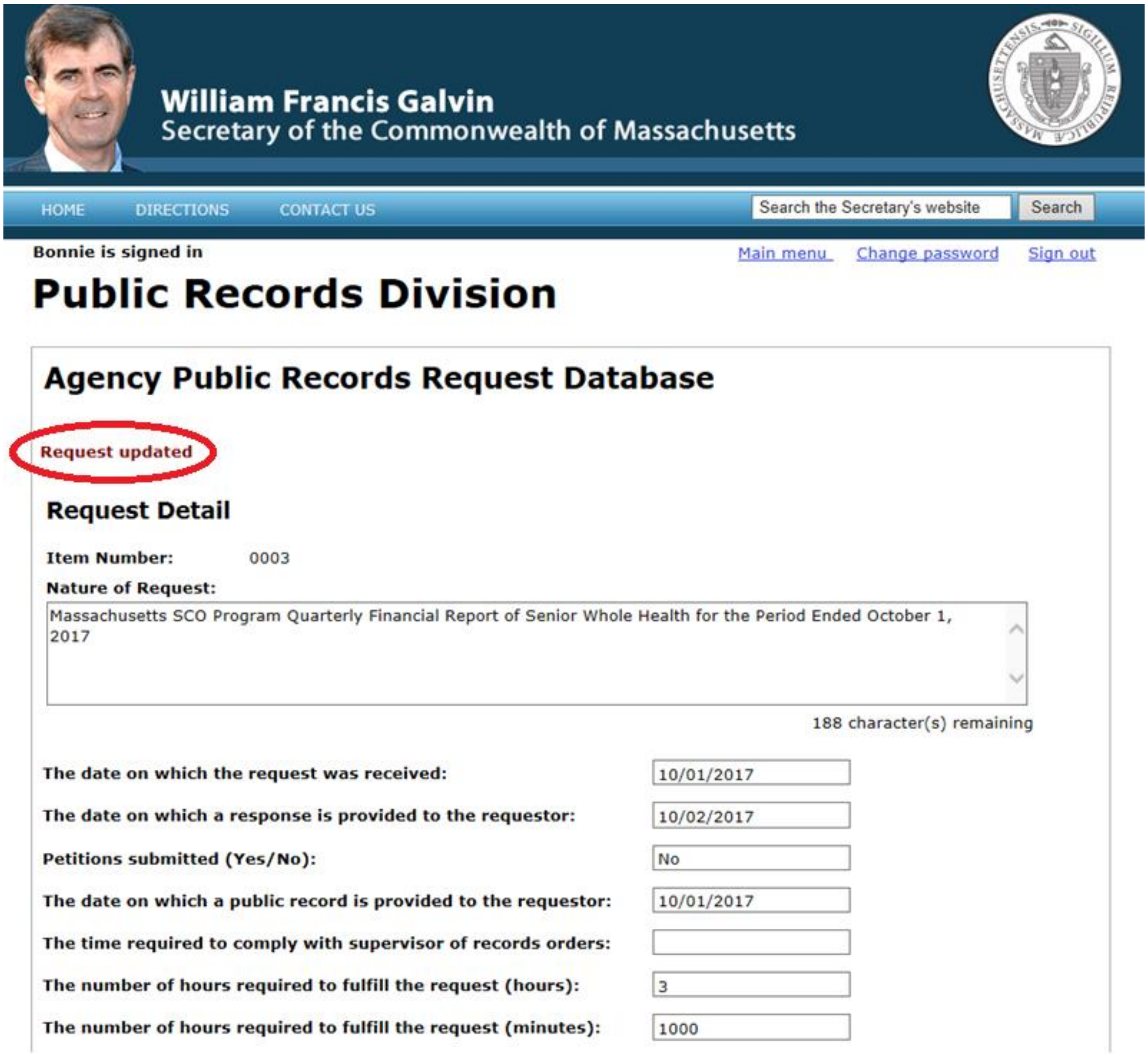
Nature of Request:

Massachusetts SWH Program Quarterly Financial Report of Senior Whole Health for the Period Ended April 1, 2017 Received 1

179 character(s) remaining

The date on which the request was received:	04/01/2017
* The date on which a response is provided to the requestor:	4/2/2017, 4/3/2017
Petitions submitted (Yes/No):	No
The date on which a public record is provided to the requestor:	04/03/2017
The time required to comply with supervisor of records orders:	
The number of hours required to fulfill the request (hours):	1
The number of hours required to fulfill the request (minutes):	0
Fees charged to the person making the request, if any:	$25.00

The message **Request updated** confirms the changes were saved



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Request updated

Request Detail

Item Number: 0003

Nature of Request:

Massachusetts SCO Program Quarterly Financial Report of Senior Whole Health for the Period Ended October 1, 2017

188 character(s) remaining

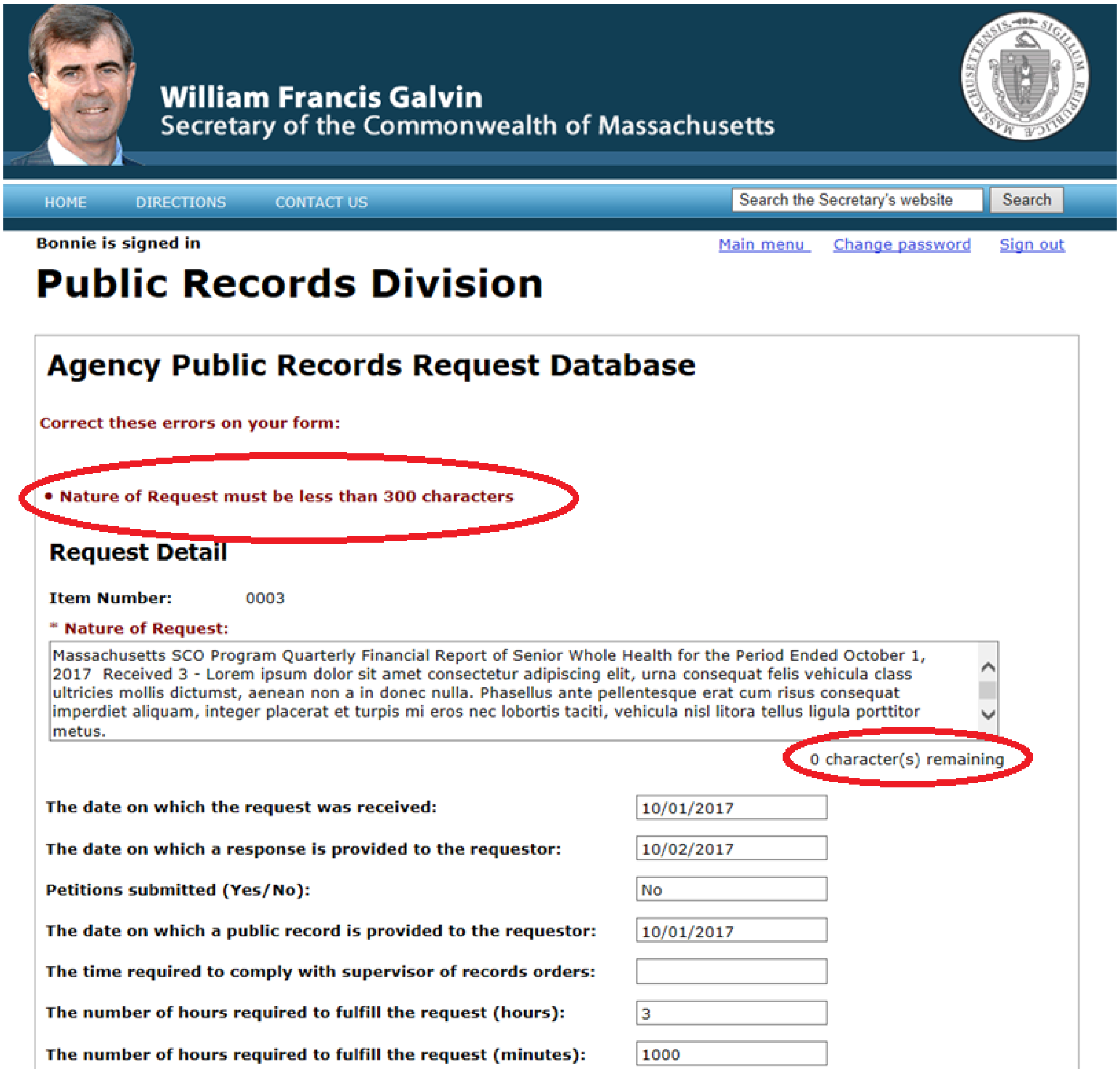
The date on which the request was received:	10/01/2017
The date on which a response is provided to the requestor:	10/02/2017
Petitions submitted (Yes/No):	No
The date on which a public record is provided to the requestor:	10/01/2017
The time required to comply with supervisor of records orders:	
The number of hours required to fulfill the request (hours):	3
The number of hours required to fulfill the request (minutes):	1000

After you correct errors, the number of errors in the message changes from 2 to 1

Edit request record – Reduce characters in Nature of Request

A common error is too many characters in the **Nature of request** field.

Make the change and select the **Save** button.



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Correct these errors on your form:

- **Nature of Request must be less than 300 characters**

Request Detail

Item Number: 0003

*** Nature of Request:**

Massachusetts SCO Program Quarterly Financial Report of Senior Whole Health for the Period Ended October 1, 2017 Received 3 - Lorem ipsum dolor sit amet consectetur adipiscing elit, urna consequat felis vehicula class ultricies mollis dictumst, aenean non a in donec nulla. Phasellus ante pellentesque erat cum risus consequat imperdiet aliquam, integer placerat et turpis mi eros nec lobortis taciti, vehicula nisl litora tellus ligula porttitor metus.

0 character(s) remaining

The date on which the request was received:	10/01/2017
The date on which a response is provided to the requestor:	10/02/2017
Petitions submitted (Yes/No):	No
The date on which a public record is provided to the requestor:	10/01/2017
The time required to comply with supervisor of records orders:	
The number of hours required to fulfill the request (hours):	3
The number of hours required to fulfill the request (minutes):	1000

Task C: Resolve duplicates between the uploaded file and the Request Database

After uploading the Excel file into the preview grid, 3 duplicates are reported.

When duplicates exist between the Excel file and the Request Database, you may be attempting to upload requests that have already been submitted to the Request Database.

Select the **View Duplicates** button to identify the requests in error.

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Agency Public Records Request Database

Upload Request Duplicates

Number of duplicate records found between the uploaded file and the Request Database: 3

Nature of Request	Duplicate items numbers
Massachusetts SCO Program Quarterly Financial Report of Senior Whole Health for the Period Ended April 1, 2017 Received 1	0001
Massachusetts SCO Program Quarterly Financial Report of Senior Whole Health for the Period Ended July 1, 2017 Received 2	0002
Massachusetts SCO Program Quarterly Financial Report of Senior Whole Health for the Period Ended September 30, 2016	0025

Back to upload a request file | Print results

Task D: Resolve duplicates within the Excel file and between the uploaded file and the Request Database

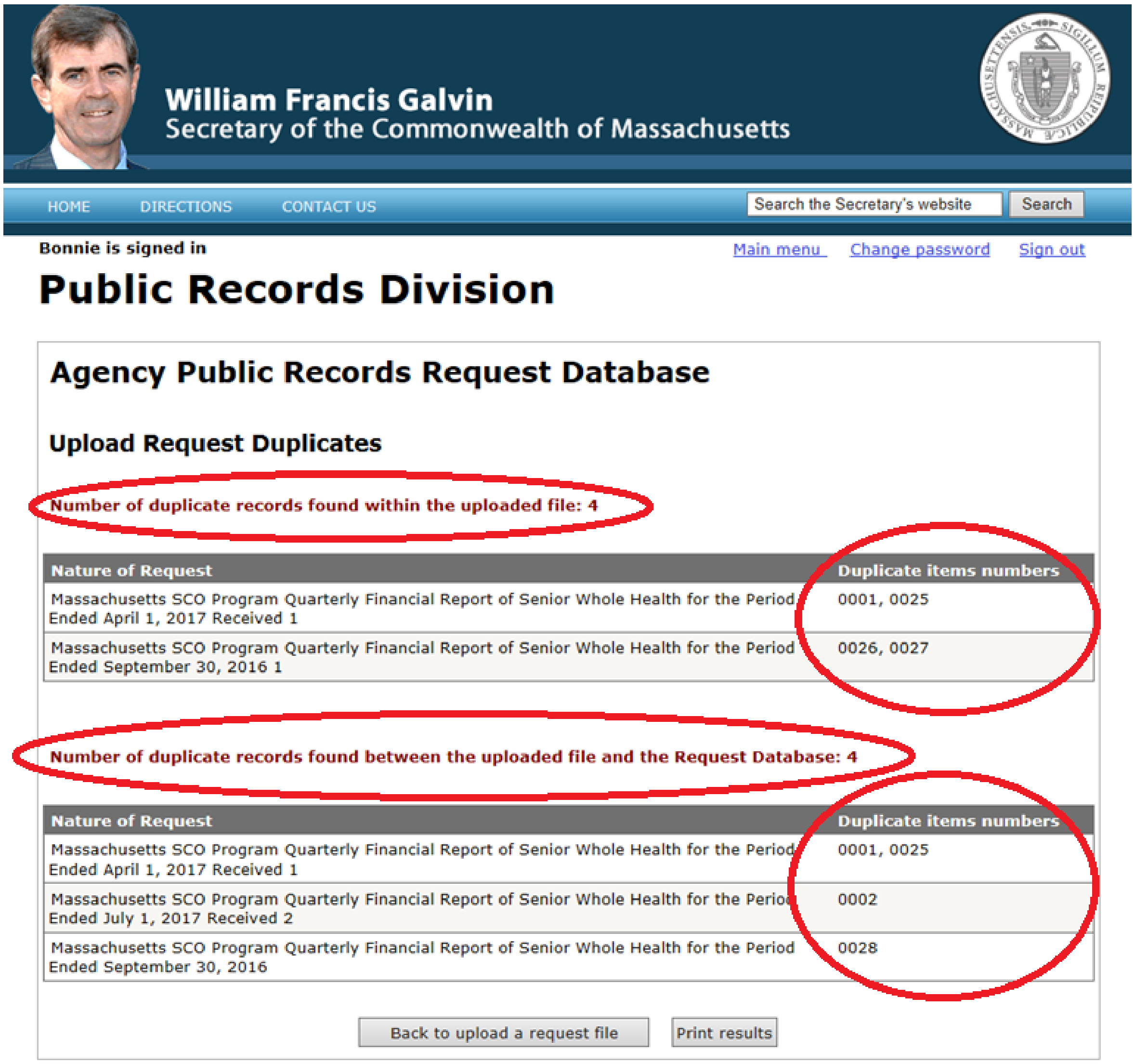
After uploading the Excel file into the preview grid, 4 duplicates exist within the Excel file and 4 duplicates exist between the Excel file and the Request Database.

Select the **View Duplicates** button to identify the item numbers in error.

Upload Request Duplicates displays with two grids

The first grid displays 2 sets of duplicates within the Excel file.

The second grid displays 4 items in the Excel file that already exist in the Request Database.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Upload Request Duplicates

Number of duplicate records found within the uploaded file: 4

Nature of Request	Duplicate items numbers
Massachusetts SCO Program Quarterly Financial Report of Senior Whole Health for the Period Ended April 1, 2017 Received 1	0001, 0025
Massachusetts SCO Program Quarterly Financial Report of Senior Whole Health for the Period Ended September 30, 2016 1	0026, 0027

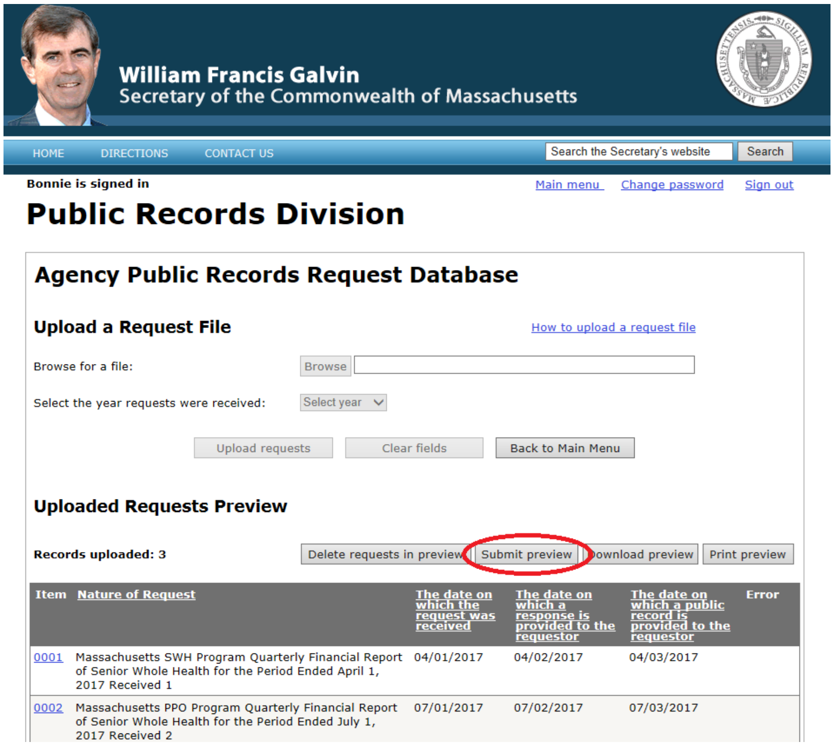
Number of duplicate records found between the uploaded file and the Request Database: 4

Nature of Request	Duplicate items numbers
Massachusetts SCO Program Quarterly Financial Report of Senior Whole Health for the Period Ended April 1, 2017 Received 1	0001, 0025
Massachusetts SCO Program Quarterly Financial Report of Senior Whole Health for the Period Ended July 1, 2017 Received 2	0002
Massachusetts SCO Program Quarterly Financial Report of Senior Whole Health for the Period Ended September 30, 2016	0028

Back to upload a request file | Print results

Step 3: Submit data to Request Database

Task A: Select the **Submit preview** button



Task B: Select the **Submit preview** button to continue

Task C: Successful upload confirmation

The message **All requests submitted successfully** confirms the upload of all requests in the preview grid into the Request Database

How to reset the preview grid to upload a request file

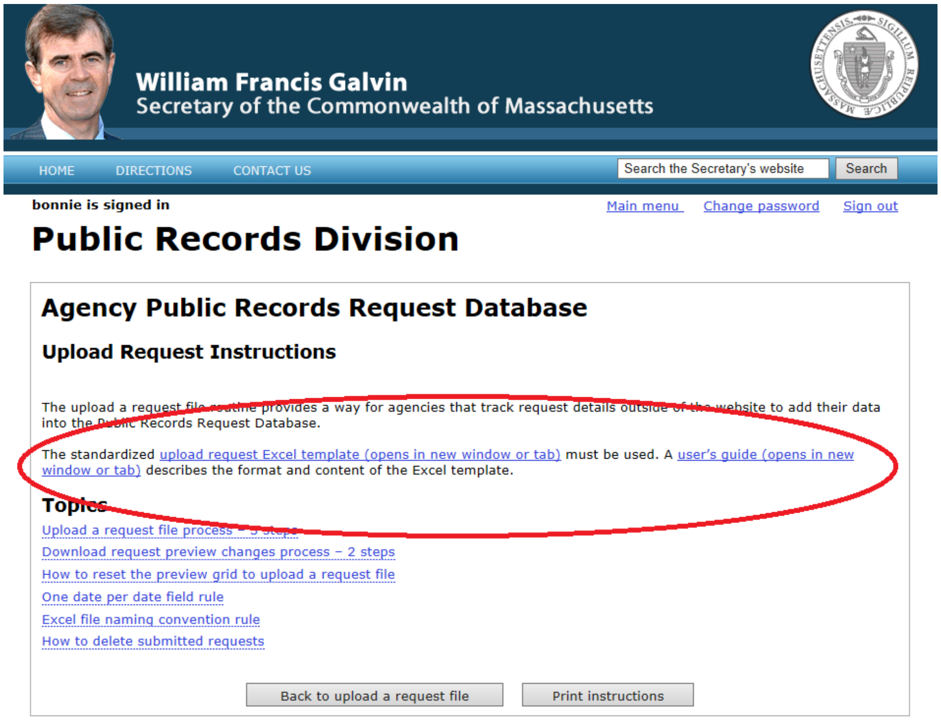
Select **Delete requests in preview** button to remove the requests from the preview grid

The message **All uploaded requests were deleted** confirms the preview grid has been cleared for another upload

Note: Only one file can be uploaded at a time

How to upload a request file online instructions

The online Upload Request Instructions contains links to the Public Request Upload Template Excel file and User Guide.



The Topics are “hot linked”, and when selected, the content expands downward.

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Agency Public Records Request Database

Upload Request Instructions

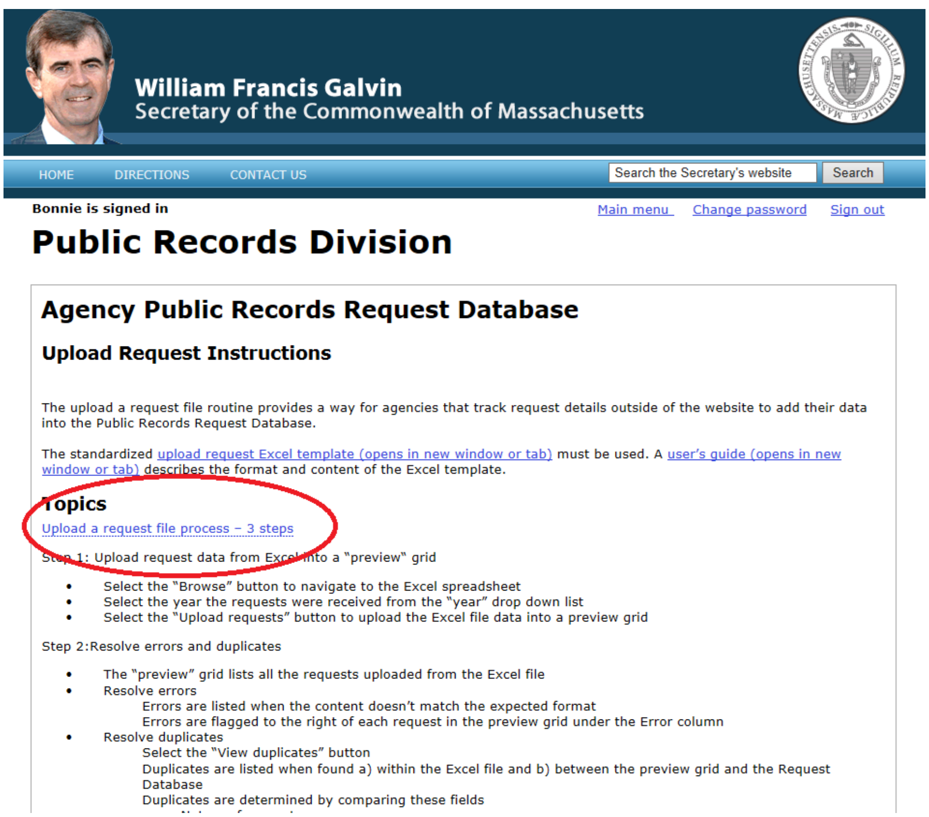
The upload a request file routine provides a way for agencies that track request details outside of the website to add their data into the Public Records Request Database.

The standardized upload request Excel template (opens in new window or tab) must be used. A user’s guide (opens in new window or tab) describes the format and content of the Excel template.

Topics

Upload a request file process – 3 steps
Download request preview changes process – 2 steps
How to reset the preview grid to upload a request file
One date per date field rule
Excel file naming convention rule
How to delete submitted requests

Back to upload a request file | Print instructions



William Francis Galvin
Secretary of the Commonwealth of Massachusetts

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Public Records Division

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Topics

Upload a request file process – 3 steps

Step 1: Upload request data from Excel into a “preview” grid

- Select the “Browse” button to navigate to the Excel spreadsheet
- Select the year the requests were received from the “year” drop down list
- Select the “Upload requests” button to upload the Excel file data into a preview grid

Step 2:Resolve errors and duplicates

- The “preview” grid lists all the requests uploaded from the Excel file
- Resolve errors
  - Errors are listed when the content doesn’t match the expected format
  - Errors are flagged to the right of each request in the preview grid under the Error column
- Resolve duplicates
  - Select the “View duplicates” button
  - Duplicates are listed when found a) within the Excel file and b) between the preview grid and the Request Database
  - Duplicates are determined by comparing these fields

How to download request preview changes into an Excel file

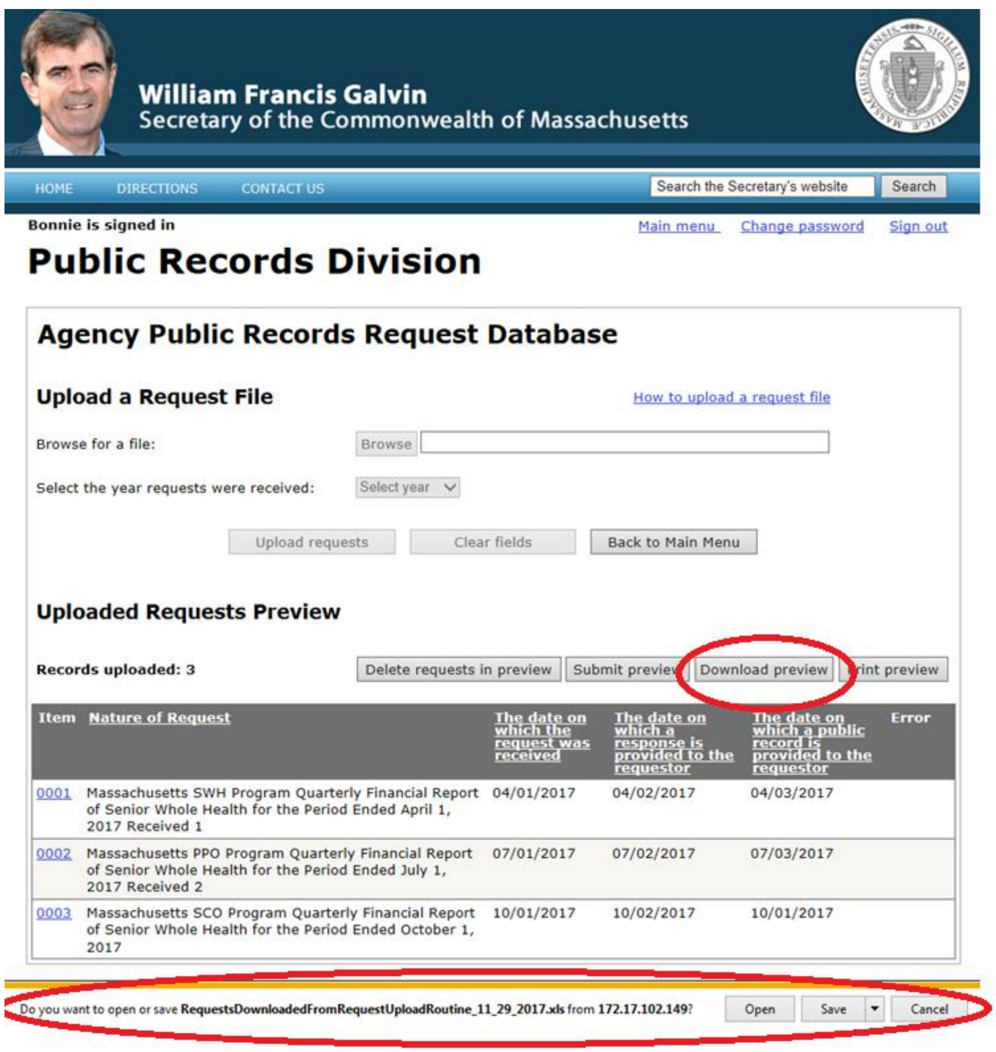
A download feature provides a way to save the changes you make in the preview grid.

Task A: Download requests from the preview grid

- Select the "Download preview" button
- A tabular list of the preview data is displayed

Task B: Save data to file

- Select the "disk" icon to export data
- Select "Excel" menu item
- Follow your browser's instructions to save the file



How to Delete requests from the Request Database

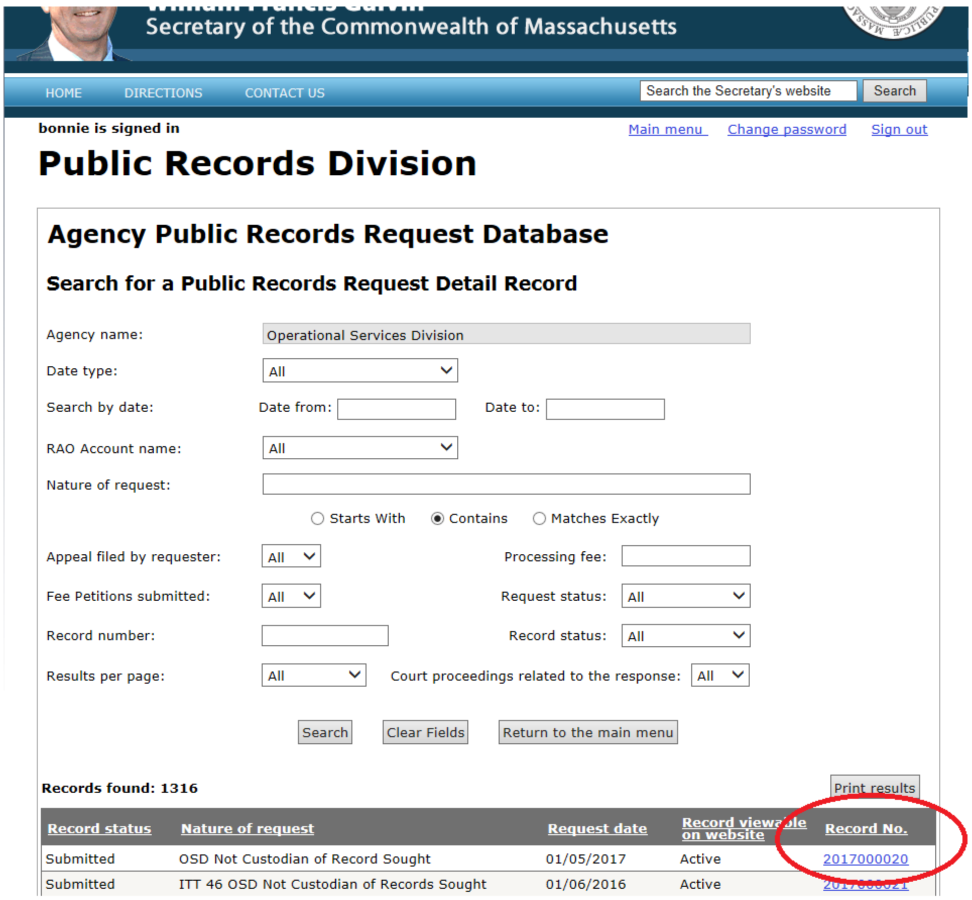
Delete one request at a time

From the main menu, select **Search for Public Records request detail records** link

On the search page, enter values to filter the requests to the one you wish to delete

Select the **Search** button

From the results grid, select the appropriate **Record Number**



From the Public Record Request Detail Record page, select **Inactivate record** button

Delete uploaded requests in bulk

Contact the Public Records Division

Email them at RAOManagerAdmin@sec.state.ma.us or call 617-727-2832 for assistance