



Public Facing Documents

Automating Transparency

Presenter: Amanda Bradford
trainingteam@powerdms.com

Amanda Bradford

**Training Specialist II &
Certified Professional Program Coordinator**



Objectives

- Understand use case opportunities for the Public Facing documents feature.
- How to make your documents public facing.
- Provided display options and how to alternate views.
- How to manage document updates.

A few things to note:

- This session is being recorded.
- The recording will be automatically e-mailed to all registrants of this session as soon as it becomes available.
- **You can and should** download a copy of this presentation from that Handouts section of the GoToWebinar sidebar.
- You can type in your questions at any time within the questions field GoToWebinar interface.

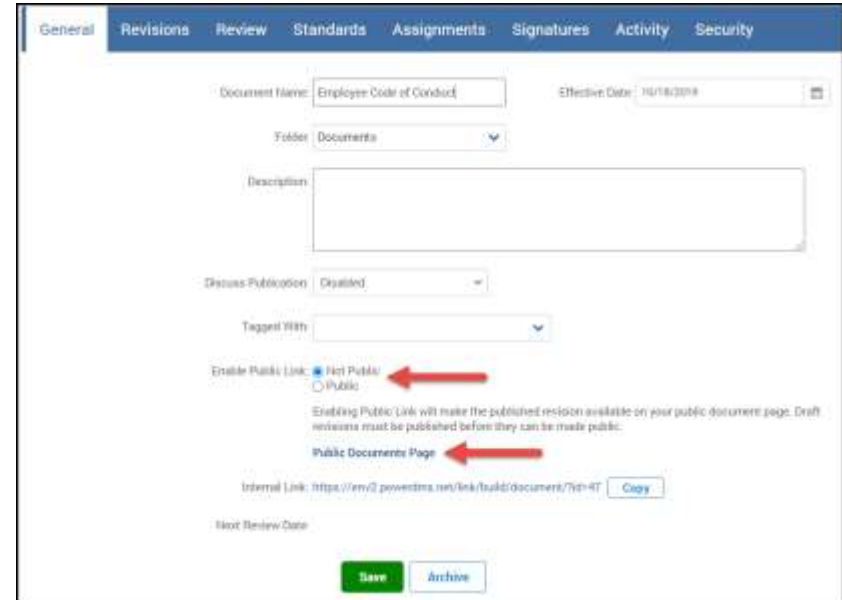
Why Public Facing Documents

- ✓ PowerDMS Public Facing Documents is a fast, simple way to ensure the public has access to the most current versions of your policies and procedures.
- ✓ A master administrator can publish documents and other critical content to their agency's website for the public to view and download.
- ✓ You can also easily share a public link to whomever you choose, regardless of whether they are a PowerDMS user.

Make a document Public...

- Navigate to the management tab of your intended document(s).
- Open the document's General tab and from the Enabled Public Link section, select Public and save.

Note: If you'd like to view a list of all your public facing documents click Public Documents Page.



The screenshot shows the 'General' tab of a document management interface. The document name is 'Employee Code of Conduct' and the effective date is '10/18/2018'. The folder is 'Documents'. The description field is empty. The 'Status Publication' is set to 'Enabled'. The 'Tagged With' field is empty. Under the 'Enable Public Link' section, the 'Not Public' radio button is selected, and the 'Public' radio button is highlighted with a red arrow. Below this, the text states: 'Enabling Public Link will make the published revision available on your public document page. Draft revisions must be published before they can be made public.' The 'Public Documents Page' link is also highlighted with a red arrow. The 'Internal Link' is 'https://em/2/powerdms.net/link/public/document/764-4T' with a 'Copy' button. At the bottom, there are 'Save' and 'Archive' buttons.

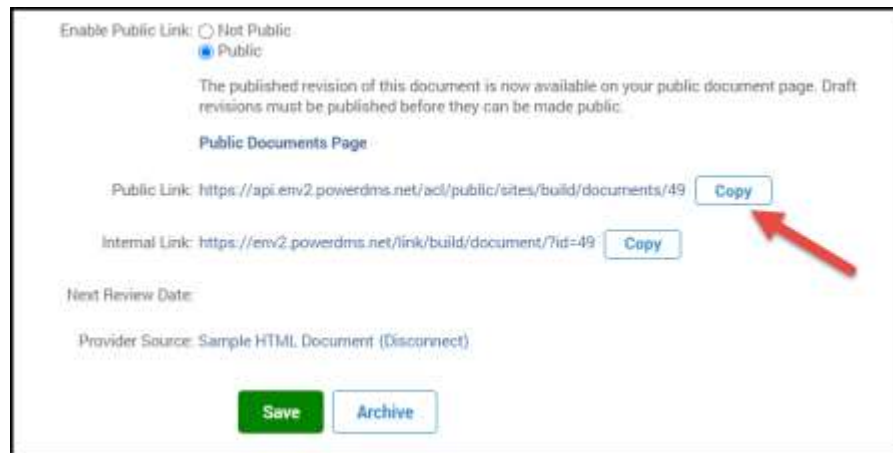
Using the public link on your website

PowerDMS also automatically generates a custom link for each document marked Public.

You can view that link in the Public Link field.

When your document is Not Public, only an Internal Link will show.

Be sure to copy the appropriate link and then use that to connect the document to your web page.



The screenshot displays the 'Enable Public Link' section of the PowerDMS interface. At the top, there are two radio buttons: 'Not Public' (unselected) and 'Public' (selected). Below this, a message states: 'The published revision of this document is now available on your public document page. Draft revisions must be published before they can be made public.' Underneath, the 'Public Documents Page' is listed. Two links are provided: a 'Public Link' and an 'Internal Link'. Each link has a 'Copy' button next to it. A red arrow points to the 'Copy' button for the Public Link. At the bottom, there are 'Save' and 'Archive' buttons. The 'Provider Source' is listed as 'Sample HTML Document (Disconnect)'.

Enable Public Link: ☐ Not Public ☒ Public

The published revision of this document is now available on your public document page. Draft revisions must be published before they can be made public.

Public Documents Page

Public Link: <https://api.env2.powerdms.net/acl/public/sites/build/documents/49> Copy

Internal Link: <https://env2.powerdms.net/link/build/document/?id=49> Copy

Next Review Date:

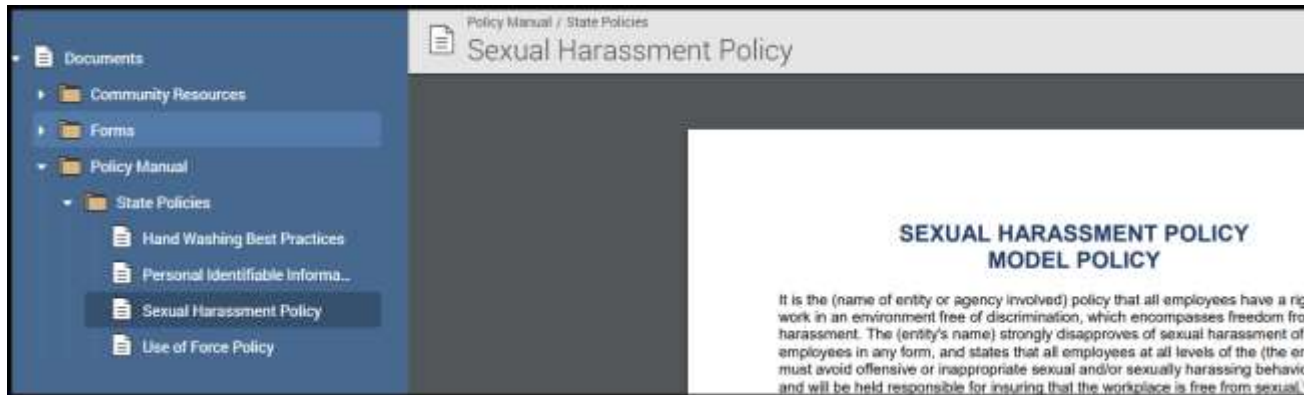
Provider Source: Sample HTML Document (Disconnect)

Save Archive

Folder/Tree View vs. List View

The default view for public facing documents is in folders ("tree view").

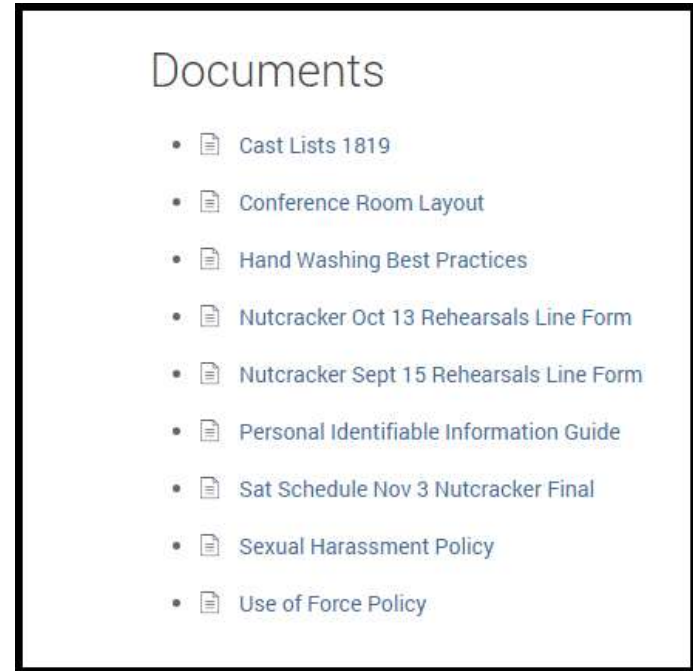
This view will allow users to click through your public documents more quickly in the blue sidebar menu without losing context of where they left off.



Folder/Tree View vs. List View

If you don't want users to be able to view your folders, and just want them to see the documents, you can choose to put your documents in List view.

Users will be able to open each document but will have to go back to the list if they'd like to see and open other public documents.




Changing Views

Administration Menu - Site Configuration - Settings - Documents

Under the **Embedded View** field in the Public Document Settings, you can change the selection in the drop-down menu from **Sidebar View** (tree view) to **List View**.

You can then enter that new embed code into your website in all the areas you would like the view to change for this document.



Site Configuration > Settings > Documents

Document Settings

- ☐ Show Confirmation prompt user to confirm identity when saving a document
- ☒ Show Document Links from History show a link to the document on user's History page
- ☒ Show Print Button show the print button on a document for non-admin users
- ☐ Show Download Button show the download button on a document for non-admin users
- ☐ Show Compare Button show the compare button on a document for non-admin users
- ☒ Show Open in new Window Button show the open in new window button on a document for non-admin users
- ☒ Show New Documents in a Browser Friendly Way render non-browser-friendly documents (such as word, excel, powerpoint) in a browser friendly way (PDF)

Save

Public Document Settings

URL: <https://www.powerdms.com/public/IDS>

Embedded View: **Sidebar View** (tree view) ←


Embed Code: `<iframe src="https://www.powerdms.com/public/IDS/tree" /></iframe>` ←

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Embedded View: **Sidebar View** (tree view) ←

Embed Code: `<iframe src="https://www.powerdms.com/public/IDS/tree" /></iframe>` ←

What about document updates?

- ✓ Document lists and their associated public links are updated in **real time**.
- ✓ This means all revisions to these documents will automatically be reflected in their public URL locations.
- ✓ This applies to folders and documents alike!



You should now know:

- Your use case opportunities for the Public Facing documents feature.
- How to make your documents public facing.
- How to provide display options and how to alternate views.
- How to manage document updates.



If after the session, please reach out to trainingteam@powerdms.com!

Support Resources

Success Community Article:

- [Public Facing Documents](#)
- [Public Facing Documents: Search Setup](#)

PowerDMS Support Team:

- 1-888-959-5158 or support@powerdms.com