

Prime Government Solutions | 4250 Drinkwater Blvd, Suite 300, Scottsdale, AZ 85251 | 801-341 1910 | info@primegov.com

Public Portal Upgrade

Version 20.5.6

PrimeGov are excited to introduce our newest public portal to our clients. We have taken existing feedback and feature requests, reviewed current functionality, and consulted with our design team to come up with a fresh and modern upgrade to our existing portal.

Some of the highlights in the new portal include

- A fresh look and feel
- Separation of Upcoming and Archived Meetings
- Addition of filters for Committee and Date in Upcoming Meetings
- Addition of filter for Committees in Archived Meetings
- Addition of a Committee specific view for 'Current & Upcoming Meetings' and 'Archived Meetings'
- Improvements to meeting document access options
- Improvements to the display of search results

Updating to the new portal is optional and the existing portal will function as it always has.

The document search will continue to work across both portals. There have been no feature changes to the search functionality.

Note: The pages are responsive to the width of the window and the space available, some slight adjustments from the images below may occur due to responsive adjustments.

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How Do I Access the New Portal?

As of version 20.5.6, the new search portal is available at the following

URL – https://cityname.primegov.com/public/portal. For sites where the portal is currently embedded via an iframe – the new portal can be accessed using https://cityname.primegov.com/public/portal?fromiframe=true

If you wish to view the meetings list of just a specific Committee, the URL

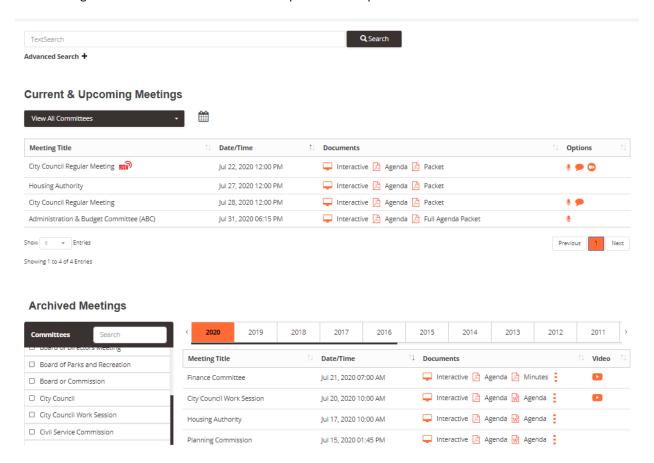
https://cityname.primegov.com//public/portal?committee=3 can be used, where the Committee ID from PrimeGov is added to filter as needed.

Note: Committee filters are not available in this view as it is pre-filtered for the selected Committee. Any search run from this view will run a search where the selected Committee is populated in 'Committees' in advanced search.

Your PrimeGov product and websites can be updated to access this URL, please contact your PrimeGov Support contact to arrange this. The Support Team can provide you with the details to update any embedded pages on your own sites and can also update the internal short-cut within the main product.

Main Portal Page

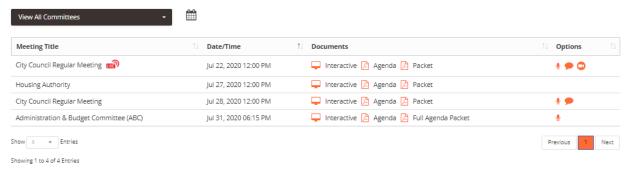
The main portal page is available on the initial load of the page, https://cityname.primegov.com/public/portal. This page contains a list of upcoming meetings and archived meetings, with options to view documents and interact with meeting. It also contains access to the search portion of the portal.



Upcoming Meetings

All meetings set for today and into the future will appear here. Meetings are sorted by date, with the earliest meeting appearing on top.

Current & Upcoming Meetings



- 1. Meeting Title The title entered for the meeting.
 - a. Coming soon Where the meeting has been set to live within Meeting Viewer, the icon will appear beside the meeting title to inform the public member that this meeting is currently in progress.
 - b. Coming soon Where a meeting is currently streaming live, a link to the live stream video will be available.
- 2. Meeting Date and Time
- 3. Documents All available documents for the meeting will be displayed here.
 - a. Where there are more documents available than can be listed within the space available, the icon appears and can be selected to access additional documents.
- 4. Options:
 - a. Request to Speak appears based on meeting settings, select here to view content in Freshdesk
 - b. Add Public Comment appears based on meting settings, select here to view content in Freshdesk
 - c. Link to Zoom meeting a direct link to the Zoom meeting where the meeting is configured with Zoon. Appears based on system settings and meeting settings
 - d. Coming soon Link to video

The list here can be filtered to show only meetings for a selected Committee and/or for a selected date.

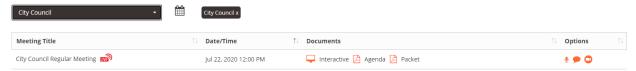
To Filter by Committee

- 1. Select the 'View All Committees' dropdown, located on top of the list of meetings
- 2. Select the required Committee



3. The 'Current & Upcoming Meetings' list will be filtered to show only meetings from the selected Committee. A small 'pill' will appear to the right of the Committee selection list to show the current selected filter.

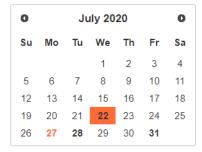
Current & Upcoming Meetings



4. The filter can be removed by selecting 'x' on the pill that appears or be selecting 'View All Committees' in the Committee selection list

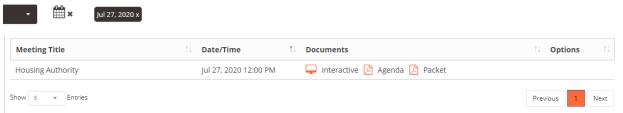
To Filter by Date

- 1. Select the calendar icon, in located under 'Current & Upcoming Meetings'
- 2. A calendar view will dock to the left of the meeting list



In this view

- i. Today's date appears highlighted with an orange background
- ii. The current selected date, where a filter is applied, appears in bold with orange font
- iii. All dates where meetings are scheduled, and which appear in 'Current & Upcoming Meetings', appear in bold
- 3. Select your required date.
- 4. The 'Current & Upcoming Meetings' list will be filtered to show only meetings from the selected date. A small 'pill' will appear to the right of the Committee selection list to show the current selected filter.



- 5. The filter can be removed by selecting 'x' on the pill that appears.
- 6. To hide the calendar, select the calendar icon, [™]*, again.

Archived Meetings

All meetings that occurred in the past, yesterday or before, will appear in this list.

Meetings are sorted by date with the most recent meeting appearing first and are divided into the relevant years to assist in locating a relevant meeting.



To view meetings for a different year, select the relevant year in the tab list. Where the number of years available is greater than the space available, the list of years can be scrolled to access other options.

There are two alternate views available for this area of the portal.

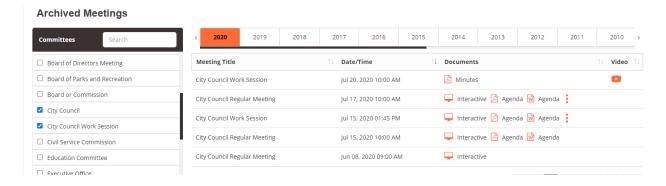
Filter View

This view is recommended where there are a larger number of Committees displayed on the portal. In this view, all Committees appear together in a single list.

Archived Meetings



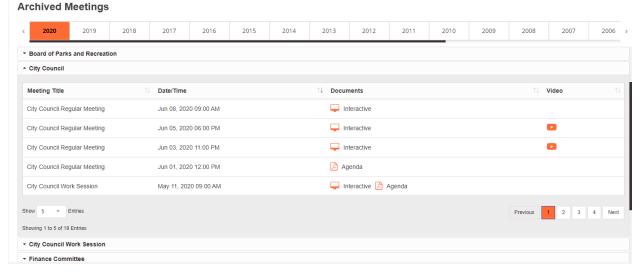
The list can be filtered by selecting one or more Committees from the list on the left. Filters can be removed by selecting the Committee a second time.



Accordion View

This view can be used where there are a smaller number of Committees displayed on the portal.

In this view, each Committee appears in a separate area that can be expanded and collapsed when viewing.



Information displayed in both views is:

- 1. Meeting Title
- 2. Meeting Date and Time
- 3. Documents All available documents for the meeting will be displayed here.
 - a. Where there are more documents available than can be listed within the space available, the icon appears and can be selected to access additional documents.
- 4. Video Where there is a video associated with the meeting, a link to the video will be provided here. This link can be enabled/disabled in the system settings.

Meetings displayed are paginated. The number of meetings displayed per page of results can be adjusted using the display option, show sometings of meetings. Multiple pages can be navigated using the page navigation options, show sometings of meetings. Multiple pages can be navigated using the page navigation options, show sometings of meetings.

Search

Search options, to search the meeting content and documents, are also available on the main page.

Enter any term in the 'Text Search' area to run a search across all available meetings and items. Advanced Search options are also available here.

Advanced Search and Search Results below for more details on search.

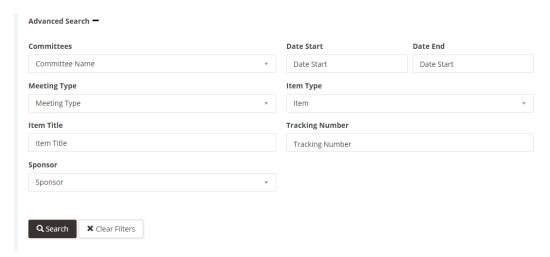
Advanced Search and Search Results

Search is initiated through the "Text Search" entry field where the user can enter any term they wish to search for and then click the search button or press enter.



This will search all indexed content (see What is available in the search index? below) and return results to the user where this term was found.

Advanced Search is also available, which provides a number of common filters to narrow down results for the user. Advanced Search options can be expanded and collapsed by selecting the '+' or '-' icon.



You can return to the list of meetings by selecting 'Back to Upcoming and Archived Meetings', located above the search results,

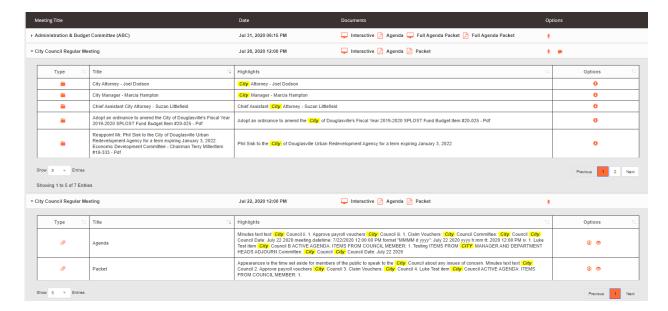
How are results displayed?

Results are returned and grouped by their relevant meetings, with the meeting farthest in the future appearing first. Meeting information displayed here is the same as in 'Current & Upcoming Meetings' – showing meeting title, meeting date and time, meeting documents and any options available for the meeting.

Meetings appear in a list, with only the first meeting expanded. Meetings can be expanded and collapsed by selecting the arrow icon to the left of the meeting title, City Council Regular Meeting.

Expanding the meeting gives the ability to view any relevant items or search hits in detail.

Each item or document that contains the search term is displayed under the meeting header and a small portion of the item/document with the search term highlighted is displayed.



Results under each page are paginated and can be adjusted using the display option, Show strates, located under the list of hits. Multiple pages can be navigated using the page navigation options, Previous Next , also located under the list of hits.

Results returned contain items or attachments:

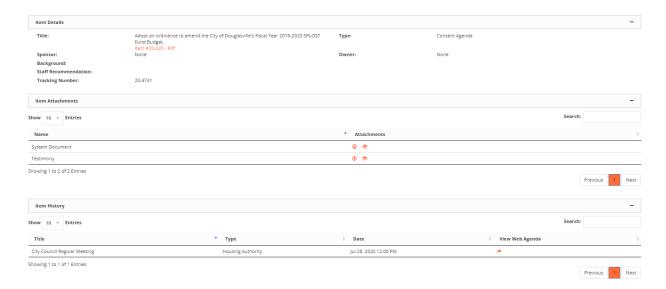
- For item(s), shown with the in on the left-hand side, information for the item can be accessed by selecting the on the right-hand side.
- For attachments, shown with the ∅ icon on the left-hand side, the document can be downloaded by selecting ⑤ on the right-hand side or can be viewed in the browser by selecting ⑤. The related item information can be accessed by selecting ⑥.

Item Details Page

Access from the search results – information related to a selected Item can be viewed.

Information is divided into three mains areas that can be expanded and collapsed as needed:

- 1. Item Details shows select information on the item.
- 2. Item Attachments shows all available attachments for the item. The document can be downloaded by selecting ① on the right-hand side or can be viewed in the browser by selecting ③ .
- 3. Item History displays all meetings that this item has been included in. Where available the interactive agenda for the meting can be viewed by selecting vinder 'View Web Agenda' on this page



What is available in the search index?

Items – The 'Item Title' and 'Item Background' fields from the item information of non-confidential items are indexed for the search. Confidential items are not included in the search. Items are shown in the results with the icon on the left-hand side.

Item Attachments – All non-confidential attachments associated with the item are indexed for the search. Confidential attachments are not included in the search. Attachments are shown in the results with the [∅] icon on the left-hand side.

Section Attachments – All non-confidential attachments are indexed for the search. Confidential attachments are not included in the search. Attachments are shown in the results with the one icon on the left-hand side.

Compiled Documents – All documents compiled and published within PrimeGov are indexed, but do not return in search results by default. This includes documents that have been uploaded and published through our meeting media page. In meetings where items have been entered in to PrimeGov and search results contain hits from these items or their attachments, the compiled documents will not be searched. This is to reduce duplication in returned results. If no items or attachments contain the required term, the compiled documents will be searched and will be returned if hits are found within them.

Note: In all documents that are indexed, we are using optical character recognition (OCR) technology to determine text to include in the index. Some images, text, and other types of content may not process successfully by the OCR service and may not be returned in the search results. If you believe there is content missing from an attachment in the search results, please contact our support team and they will obtain the relevant file to investigate further.

How is content made available to search?

When a meeting document is compiled, the meeting information is collected. This includes the items and attachments that are relevant for search purposes.

When a compiled document is published, the collected meeting information is sent to the index.

Meetings that are published internally are available to logged in users, based on their permissions.

Meetings that are published publicly are available to everyone.

Updates made to the meeting are not available to the search until the meeting has been compiled and published again.

Searchable content can take some time, typically a few minutes but varies depending on the size of the meeting, to become available to search on after a meeting has been published.