

## WHAT'S NEW IN ECOPORTAL

# Refreshed Dashboards, Mobile Kiosk Mode & AI in Action - Explore the Latest!



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# What's “*What's New*” All About?

## BEYOND A FEATURES REEL, THIS SERIES IS ABOUT:

- Keeping you up-to-date with the latest features and improvements;
- Demonstrating how you can apply new functionality to your day-to-day work;
- Ensuring you, and your teams, are getting the most out of ecoPortal.



# Today's Agenda

Here's a quick look at **what we'll cover today:**

Registers and Dashboards

01

02

Mobile Kiosk Mode

AI Updates

03

04

Smart Fill for Fields

To Do

05

06

Quick Fire Updates



01

## Register Table & Dashboards Refresh

Experience new ways to control how your data is  
organised, visualised, and shared.



# Important Information for Beta users

- **IFR Charts:** not available in Beta yet, but will be fully supported in time for organisation-wide rollouts.
- **Changes made in the new interface won't affect non-Beta Users.** Ensure the toggle is switched off for permanent updates.
- **Email reports:** switch back to the legacy design to create new reports.
- **A new default colour palette** is available, but **custom colours will remain unchanged.**
- **Expect some bumps:** if you spot issues or bugs, please submit a support ticket.

# Register Table & Dashboards

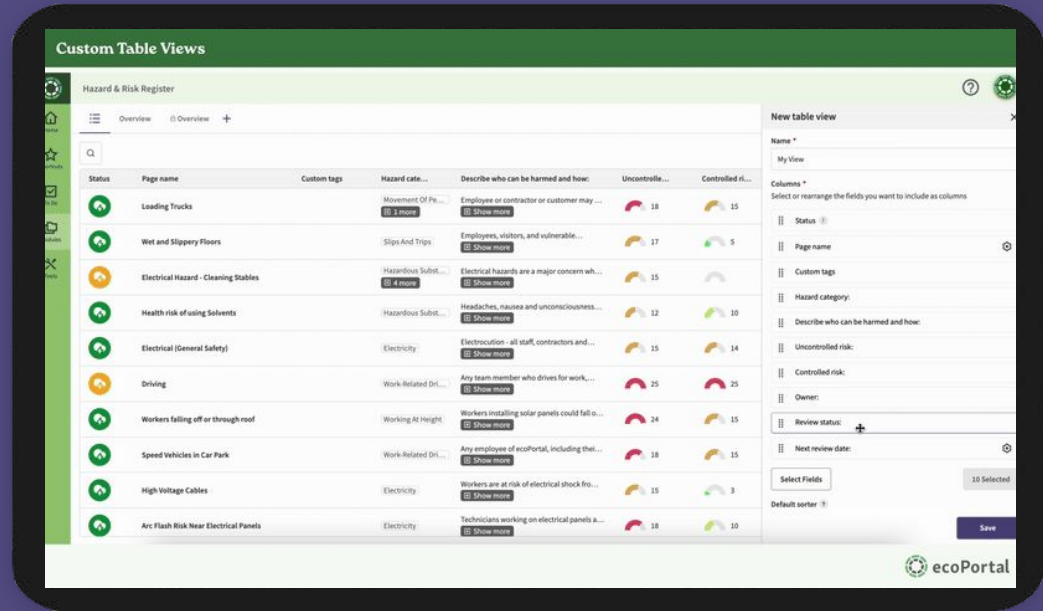
**Staggered Released:** Began 01 April\*

**What it does:** brings a more intuitive interface and adds new, exciting features.

**Why it matters:** keeps teams engaged and productive, while letting them manage data more easily and effectively.

**Main enhancements:**

- Improved navigation
- More customisation options
- Enhanced filtering
- Improved exporting and printing
- Better data access control



\*This is a major release and is being rolled out gradually. It may not have reached your organisation yet.

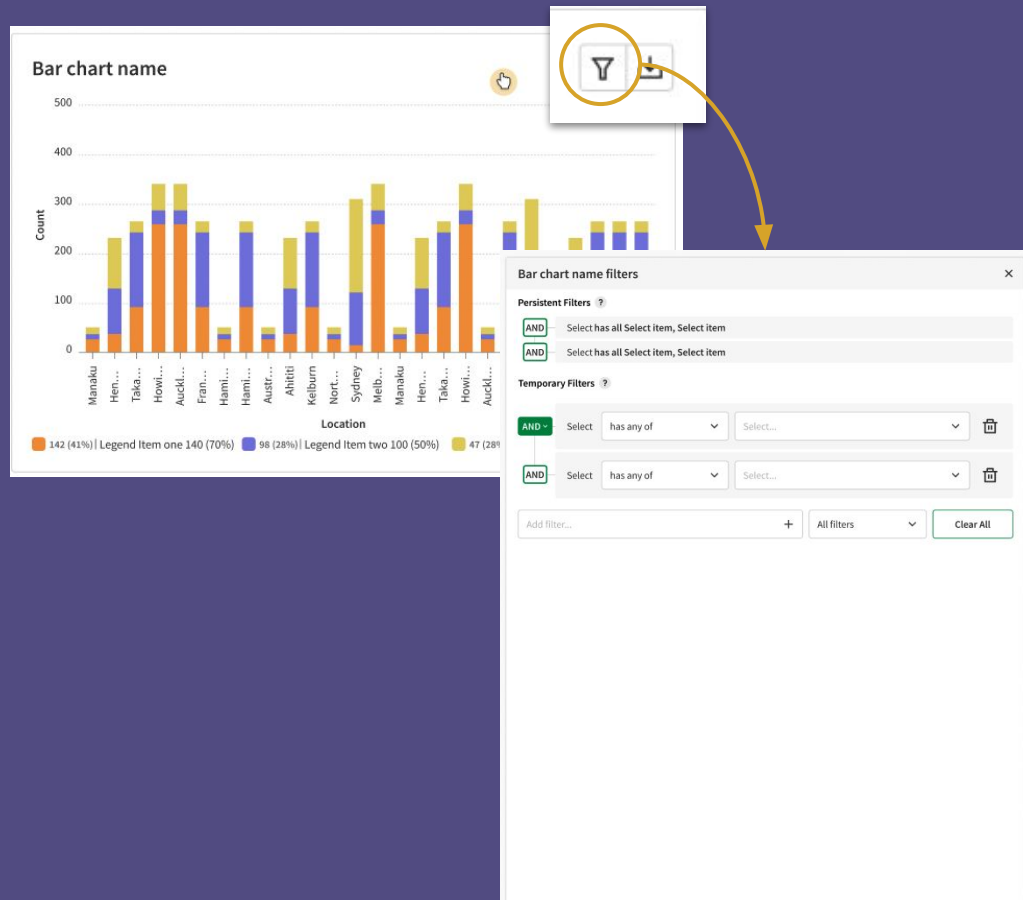
# Coming Soon to Dashboards

● Chart Filters

● Reporting Structure Classification Chart

● Filter Widget

● Chart previews



\*These are design screens. Final result in the system might be slightly different.

# Coming Soon to Dashboards

- Chart Filters
- Reporting Structure Classification Chart
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Use tags or classifications ?

☐ Tags ☒ Classifications

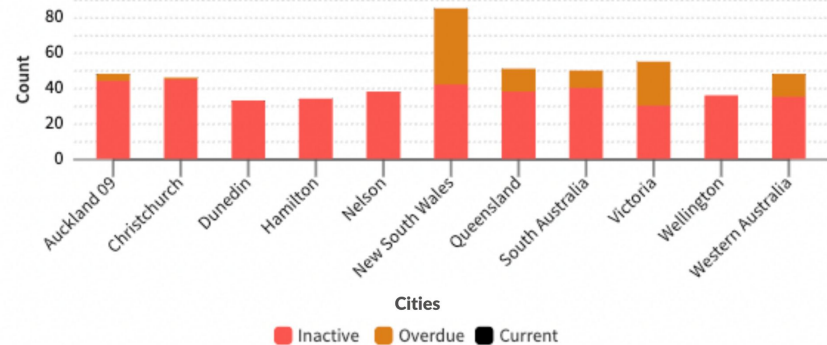
Reporting structure \*

Locations

Classification \*

City

Review Status by City Classification



\*These are design screens. Final result in the system might be slightly different.



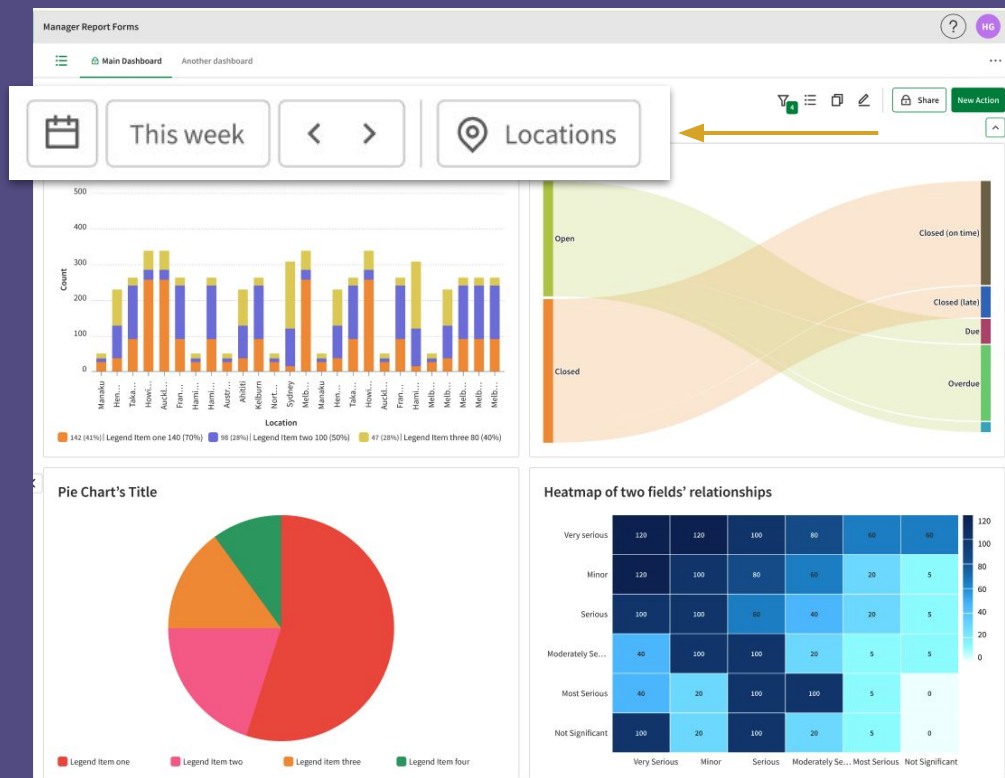
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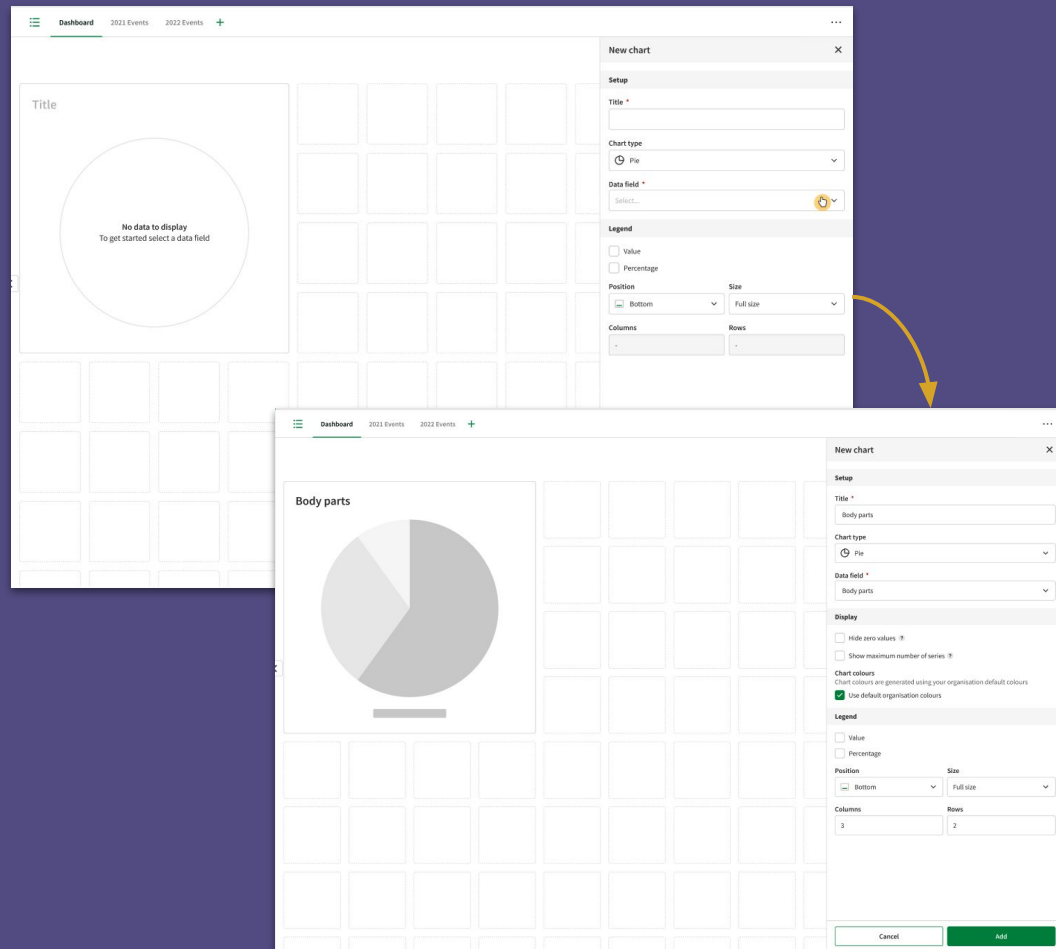
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# Coming Soon to Dashboards

- Chart Filters
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02

## « Kiosk Mode »

Improved privacy & faster submissions on any shared device.

# Mobile Kiosk Mode

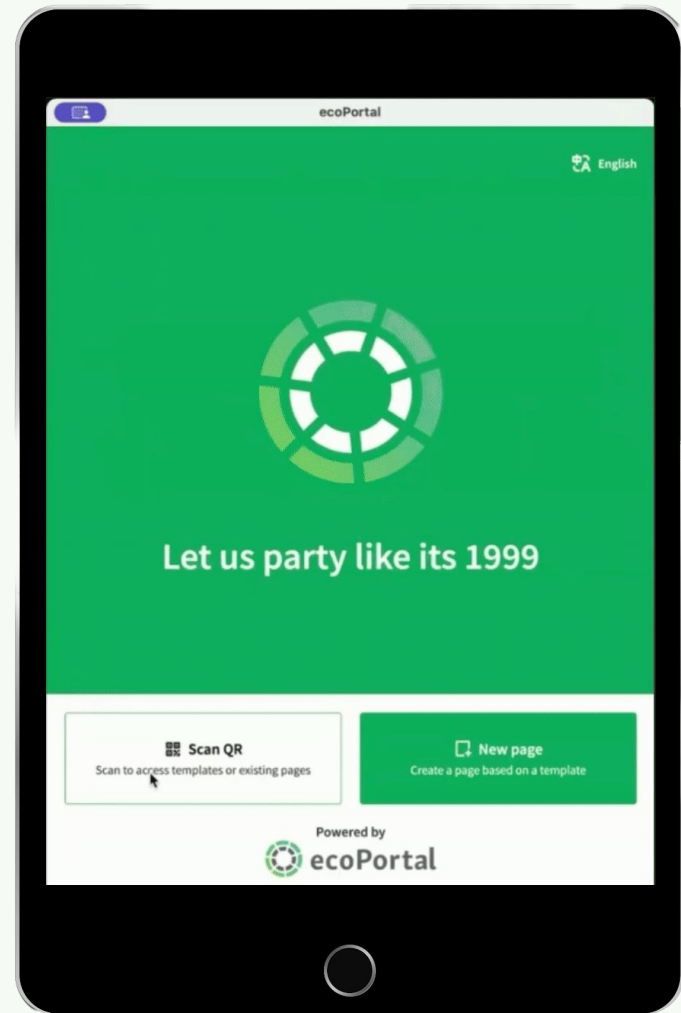
**Released:** 5 June

**What it does:** Turns any shared mobile device into a dedicated form submission tool. There's no need to log in – just pick a form and go.

**Why it matters:** Makes it easier for anyone – including contractors, visitors, and frontline teams – to report, log, or complete forms quickly and securely on a shared device.

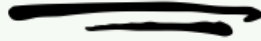
**Example use cases:**

- Retail staff needing quick access to incident or hazard forms
- Council teams or public services using tablets across shifts
- Contractors and temporary staff reporting without needing logins



03

# AI Updates



An overview of our latest and upcoming AI features

# File Content Extraction for Page Smart Tools

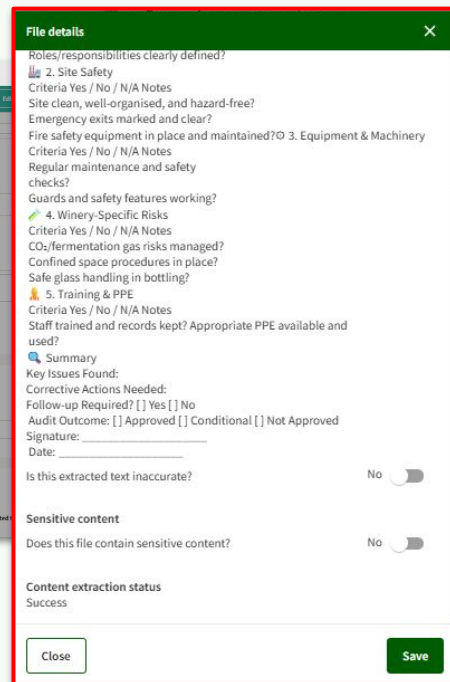
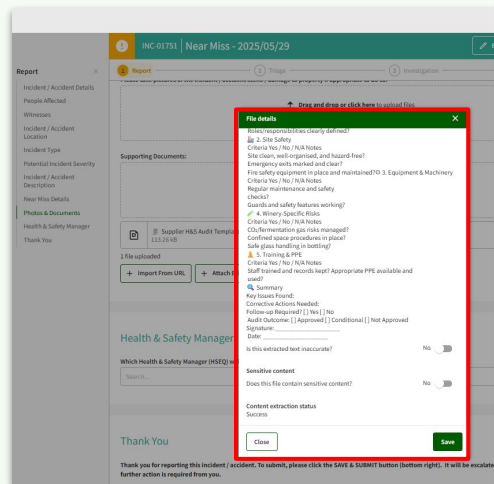
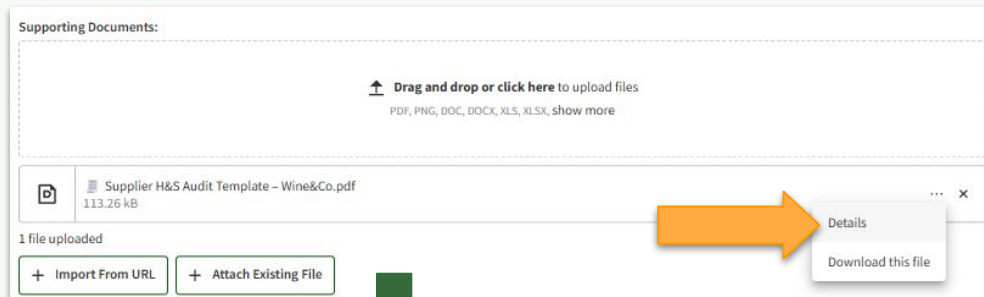
Released: June 10

**What it does:** It pulls content from file attachments on pages, so tools like summaries and the assistant can include that info in their responses.

**Why it matters:** It saves time digging through documents and helps teams get a clearer, faster view of what's inside each file.

**Example use cases:**

1. Extracting key points from reports
2. Getting policy details pulled into a summary
3. Surfacing info from investigation docs



# File Content Extraction for Page Smart Tools

Released: June 10

## What it does:

It pulls content from file attachments on pages, so tools like summaries and the assistant can include that info in their responses.

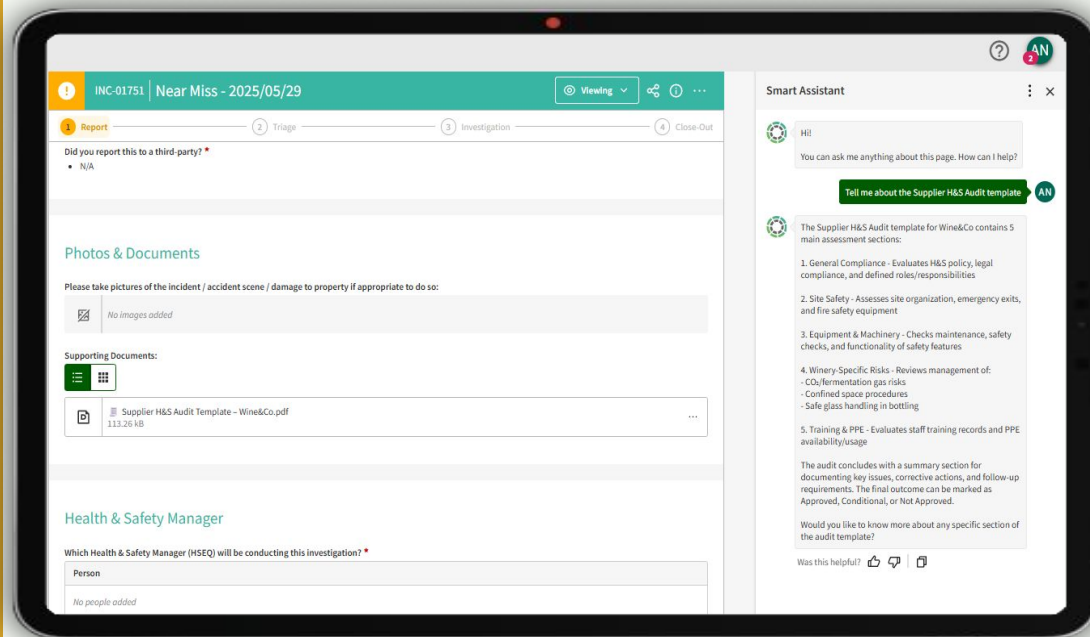
## Why it matters:

It saves time digging through documents and helps teams get a clearer, faster view of what's inside each file.

## Example use cases:

1. Extracting key points from reports
2. Getting policy details pulled into a summary
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*Smart Assistant is Able to Access and Answer Questions about File Content*

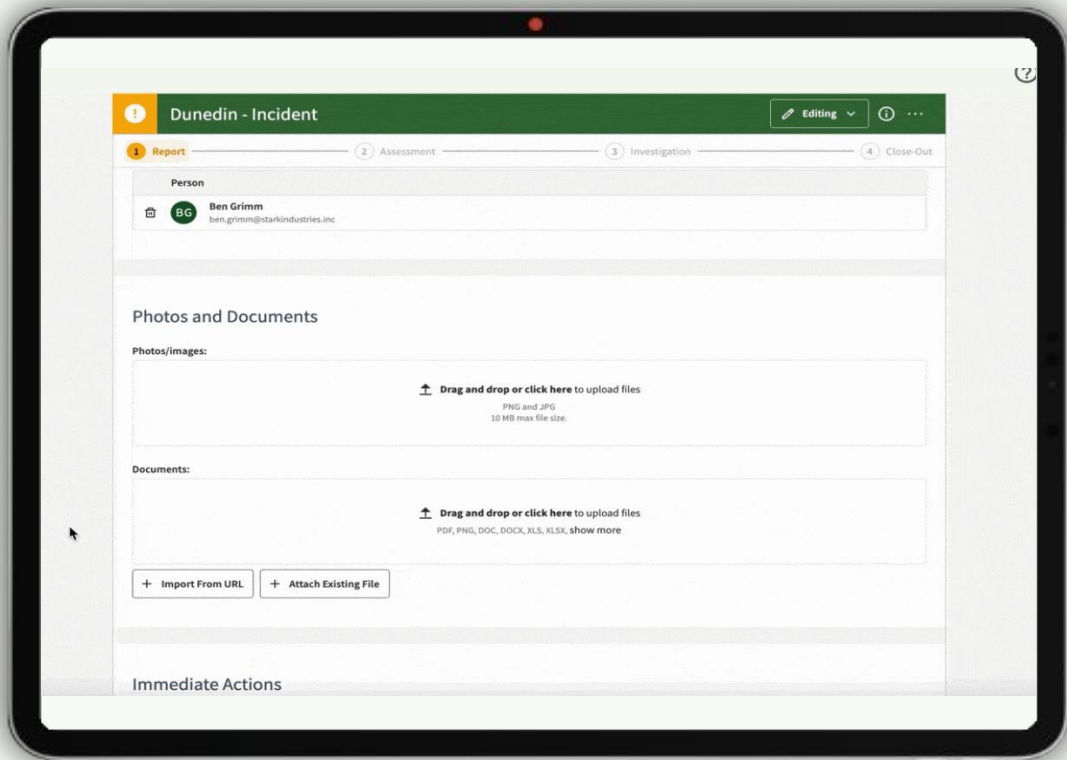


# AI Image Analysis

**Released:** June 10

**What it does:** processes uploaded images automatically — blurring sensitive content, adding captions, and connecting visuals to tools like summaries and the assistant.

**Why it matters:** It saves time and keeps visuals safe. No need for extra steps — AI handles the hard work so teams can focus on what matters.





# AI Image Analysis

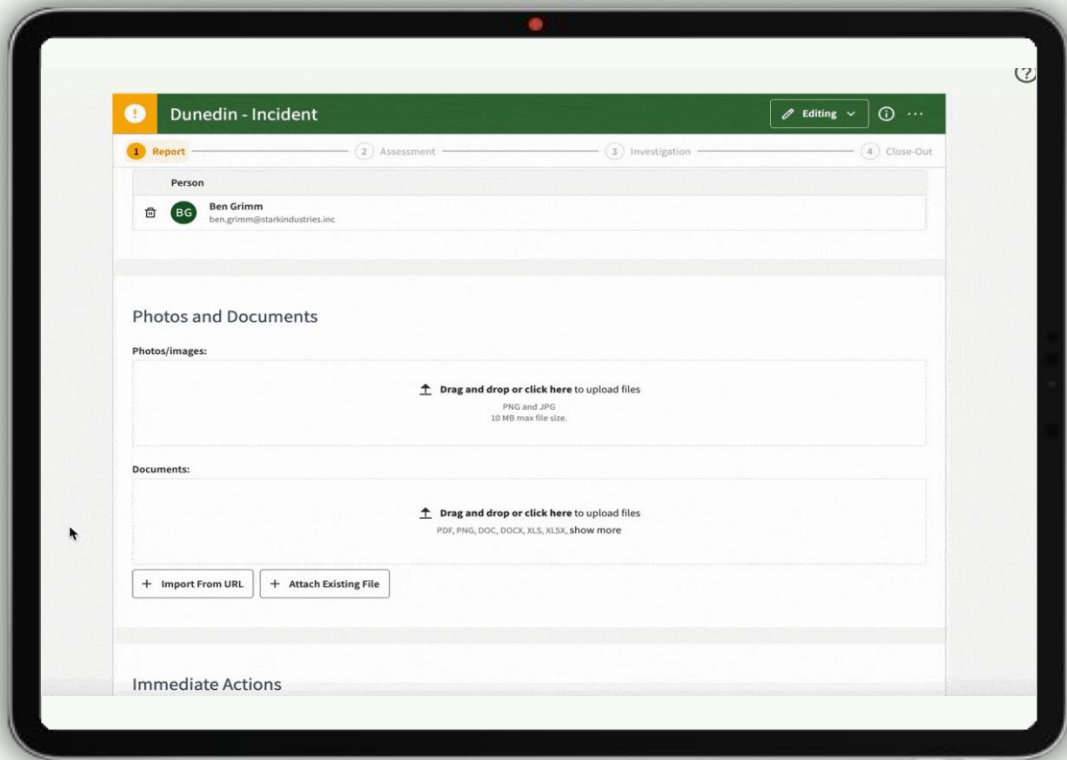
## Example use cases:

### Visual Content Safety

Jessica reviews injury-related images added to a page. By default, sensitive visuals are blurred, helping her focus without being overwhelmed. She can reveal any image manually if required.

### Image Captions for Reports

Sophie uploads multiple photos to a gallery field for a hazard report. Captions are automatically generated, saving time and ensuring reports are clear and compliant.



04

## Smart Fill for Fields

Auto-fill fields to enter, analyse, and  
act on data faster!

# Smart Fill for Fields

**Release:** Coming Soon

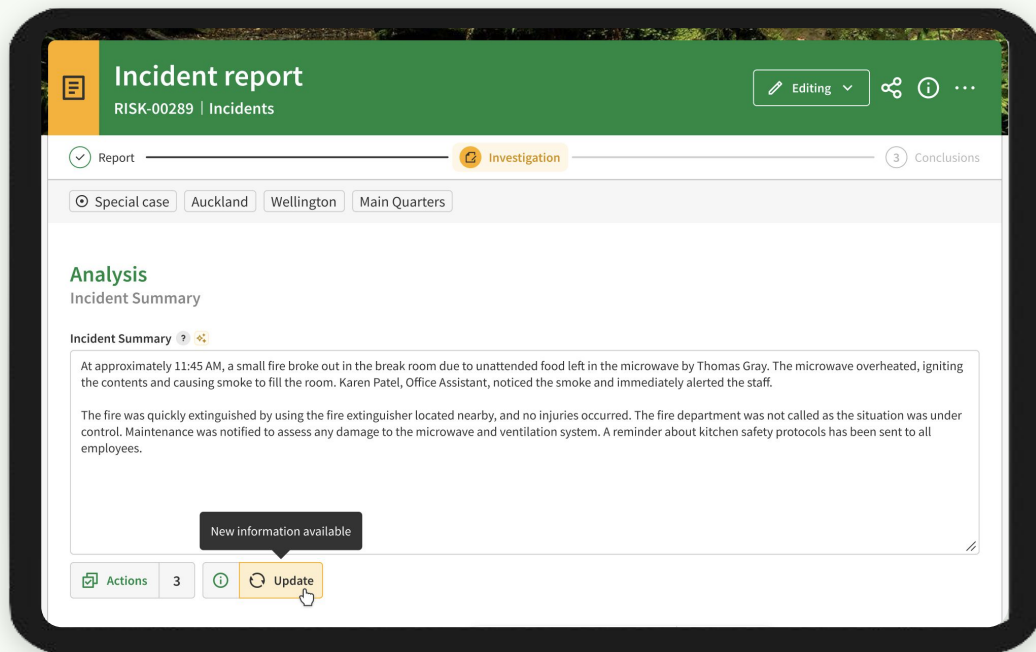
**What it does:** lets you set up fields to auto-fill, making it faster to enter, analyse, and act on data.

**Why it matters:** an evolution of the AI Summary field offering more capabilities and a better user experience.

You're only limited by your imagination!

**Example use cases:**

1. Extract expiry dates from files
2. Pre-fill permits to work with contractor prequalification details
3. Speed up reviews
4. In future, auto-create actions



# Smart Fill on Fields

Advantages over our legacy smart summary fields:

- ***Flexible triggers***

Smart fill can run Live, Manually, or via Snapshot – giving you full control over when content is generated.

- ***Context expanded***

Smart fill on fields can analyse fields from the current page and source fields from other pages as well!

- ***Improved user experience***

If your source data changes, you'll see a clear *Update* button.

- ***Field agnostic***

Can be applied to multiple field types (Text, Date, Select Box, etc.) and more.



05

## To Do Refresh



Tackle to-dos with a clearer view of what's due

# To Do Refresh

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Coming to Beta Users: 14th July

- **What's new:**

- Tasks and actions now live together in one easy-to-use space – so you can see exactly what needs your attention, all in one place.
- Calendar now includes tasks (and actions) helping you stay on top of what's due and is located on the sidebar.
- Save your most-used filter combinations as quick filters, for one-click drill down.

- **Why it matters:**

Simplifies task and action management, saving time, adding clarity, and boosting accountability.



# To Do Refresh

The screenshot displays the 'To Do' section of the Health & Safety Portal. The interface includes a green sidebar with navigation options: Home, Shortcuts, To Do, Calendar, Modules, Tools, and Settings. The main content area shows a table of tasks with columns for Task, Status, Assigned to, Page name, Registers, Tags, Stage, and Due date. A search bar at the top indicates 4 results. The task 'Injury Management : 2022-02-09' is expanded, showing details for 'Injury Management : 2022-02-09 EVN-00021', including its creation and last update timestamps.

Task	Status	Assigned to	Page name	Registers	Tags	Stage	Due date
<a href="#">Fill in</a>	In progress	Alexander S.	Injury Management : 2022-02-09	<a href="#">Injury Management</a> <a href="#">Incident</a> <a href="#">Hazards &amp; Risk Analysis</a>	Wellington Auckland Main Quarters <a href="#">10 more</a>	4 Rehabilitation	24 Nov 2021, 12:10 pm NZT
<a href="#">Comment</a>	In progress	Alexander S.	Injury Management : 2022-02-09	<a href="#">Assets</a>	Wellington Auckland Main Quarters <a href="#">10 more</a>	2 Asset status a...	24 Nov 2021, 12:10 pm NZT
<a href="#">Review</a>	Completed	Alexander S.	Injury Management : 2022-02-09 <a href="#">NAME_0000-200</a>	<a href="#">Incidents</a>	Wellington Auckland Main Quarters <a href="#">10 more</a>	Investigation	24 Nov 2021, 12:10 pm NZT
<a href="#">Fill in</a>	In progress	Alexander S.	Injury Management : 2022-02-09 <a href="#">NAME_0000-200</a>	<a href="#">Injury Management</a> <a href="#">Hazards &amp; Risk Analysis</a>	Wellington Auckland Main Quarters <a href="#">10 more</a>	3 Investigation	24 Nov 2021, 12:10 pm NZT

**Task Details:**

- Task: Injury Management : 2022-02-09 EVN-00021
- Stage: Details
- Created: Tue, 29 Apr 2021, 11:07 am
- Last updated: Tue, 29 Apr 2021, 11:09 am

06

## Quick Fire Updates

A quick round-up of recent improvements  
across ecoPortal.



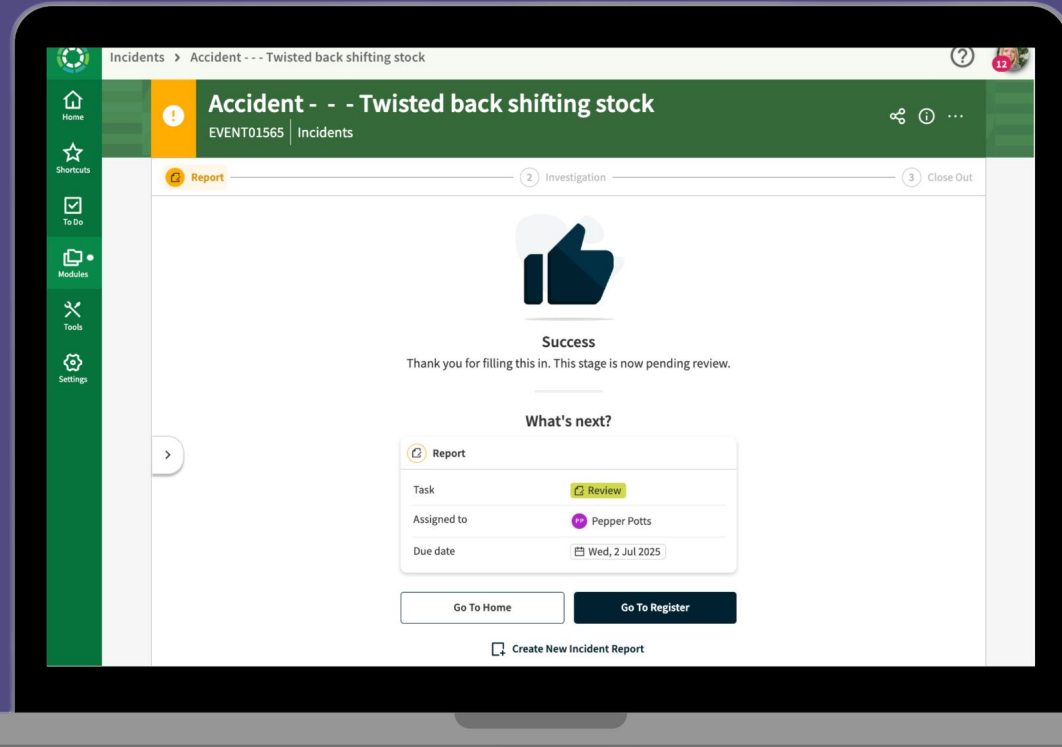
# Quick Fire Updates

- **Success Screens on Pages**  
Released 29 April

- **Visitor Management: New Config Options & Future Check-Ins**

- **Required field improvements on mobile**

- **SMS for Visitor Management**



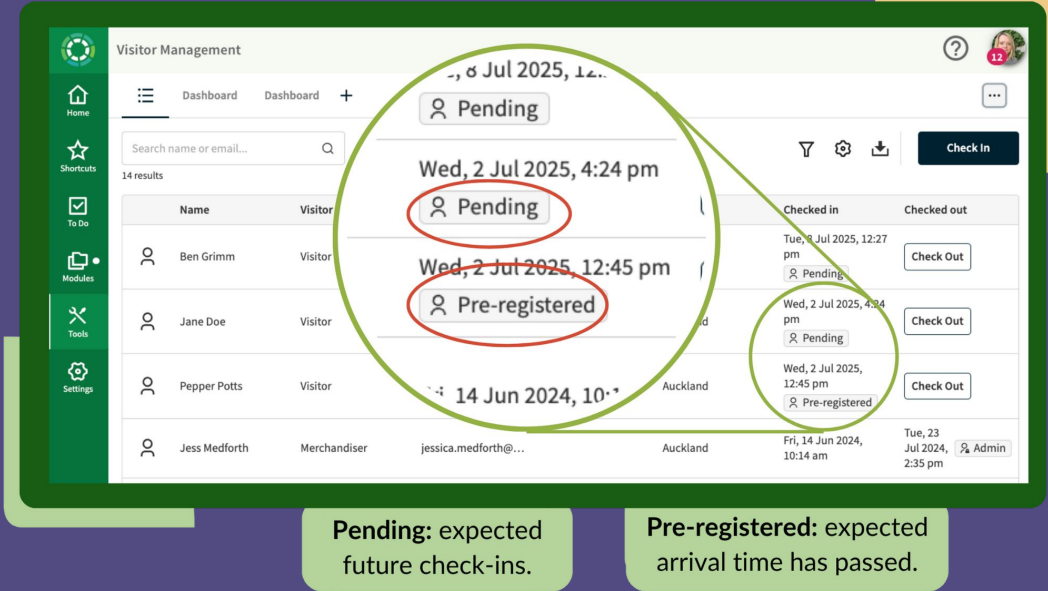
# Quick Fire Updates

Success Screens on Pages

**Visitor Management: New Config Options & Future Check-Ins Released in the last week!**

Required field improvements on mobile

SMS for Visitor Management



The screenshot displays the 'Visitor Management' dashboard. A green sidebar on the left contains navigation icons for Home, Shortcuts, To Do, Modules, Tools, and Settings. The main content area shows a list of 14 results. A green circle highlights the top two entries, which are circled in red. The first entry is 'Ben Grimm' with a 'Pending' status and a check-in time of 'Wed, 2 Jul 2025, 4:24 pm'. The second entry is 'Jane Doe' with a 'Pre-registered' status and a check-in time of 'Wed, 2 Jul 2025, 12:45 pm'. A third entry, 'Pepper Potts', is also circled in red with a 'Pre-registered' status and a check-in time of 'Wed, 2 Jul 2025, 4:34 pm'. The dashboard includes a search bar, filters, and a 'Check In' button. The bottom right corner shows the user's profile and a 'Check Out' button.

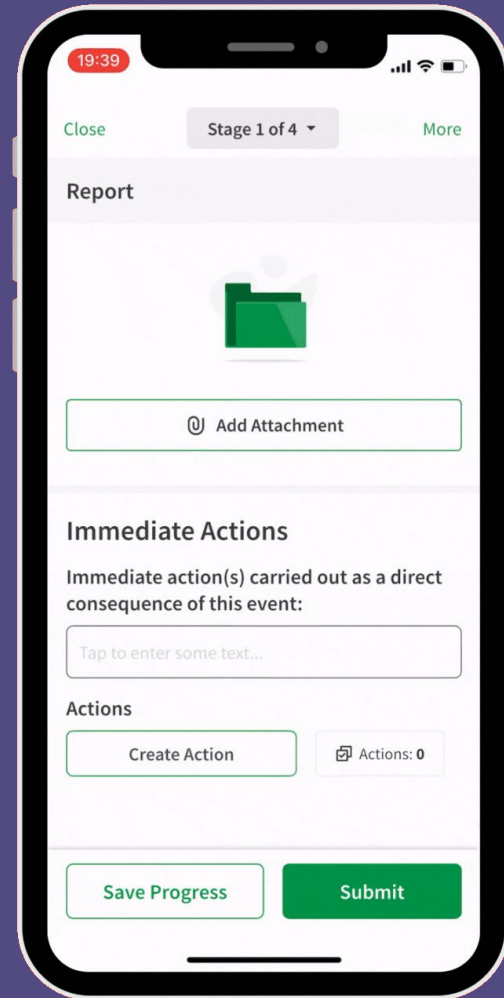
Name	Visitor	Status	Check In	Checked out
Ben Grimm	Visitor	Pending	Wed, 2 Jul 2025, 4:24 pm	Tue, 2 Jul 2025, 12:27 pm
Jane Doe	Visitor	Pre-registered	Wed, 2 Jul 2025, 12:45 pm	Wed, 2 Jul 2025, 4:34 pm
Pepper Potts	Visitor	Pre-registered	Wed, 2 Jul 2025, 4:34 pm	Wed, 2 Jul 2025, 12:45 pm
Jess Medforth	Merchandiser		Fri, 14 Jun 2024, 10:14 am	Tue, 23 Jul 2024, 2:35 pm

**Pending:** expected future check-ins.

**Pre-registered:** expected arrival time has passed.

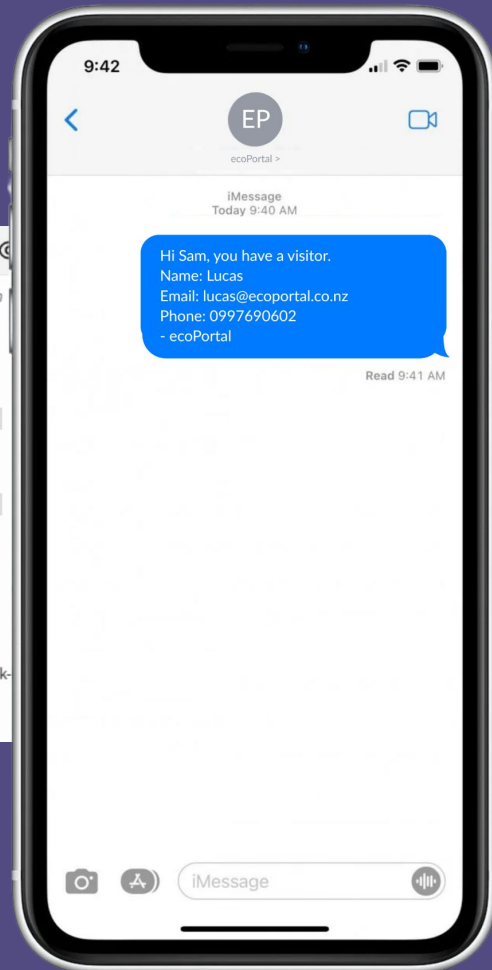
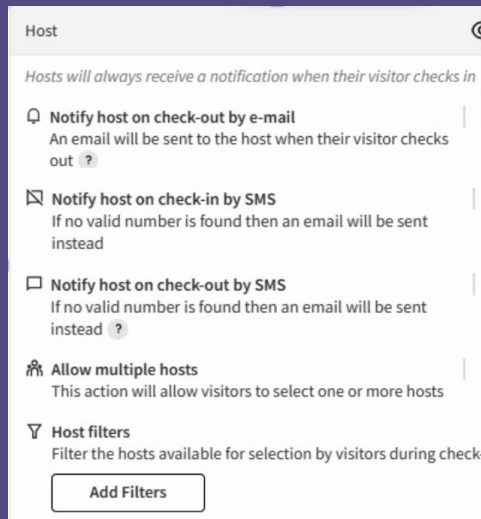
# Quick Fire Updates

- Success Screens on Pages
- Visitor Management: New Config Options & Future Check-Ins
- **Required field improvements on mobile**  
Released 27 June
- SMS for Visitor Management



# Quick Fire Updates

- Success Screens on Pages
- Visitor Management: New Config Options & Future Check-Ins
- Required field improvements on mobile
- SMS for Visitor Management Released 20 May



# Want to learn more?

Reach out to me or contact your Customer Success Manager



George Blackburn



Lucia Fusco



Rob Leyland



George Day



# Questions?

Enter them into the Q&A tab



**Sam Williams**  
Safety Solutions Partner

