Step Inside your Home Renovation

User Guide for Home

Introduction

We've transformed Home into a personalised hub where you can stay informed, and get up-to-date on your tasks, actions and activities, fast!

In this guide, we take a tour of the different components that make up Home and share how Home is different to the legacy My Dashboard - giving you the confidence to find your way around!

Table of Contents

1. An Overview: Putting the Heart into Home

Home provides you with an overview of, and quick access to, what matters most to you–putting the heart back into Home.

What you see on Home is unique to you, and has been designed to let you:

- Efficiently access your most-used forms, outstanding tasks & actions, comments, active pages, and what's coming soon all from one central hub;
- Enjoy greater control over the to-dos and coming soon items you see on screen with filters that let you modify views to suit your needs;
- Stay informed like never before with visibility into the progress of pages you've created as they move through each stage (while sticking to all permissions);
- Quickly process the information on screen with a modern layout and visual cues that direct your focus to your most pressing to-dos.
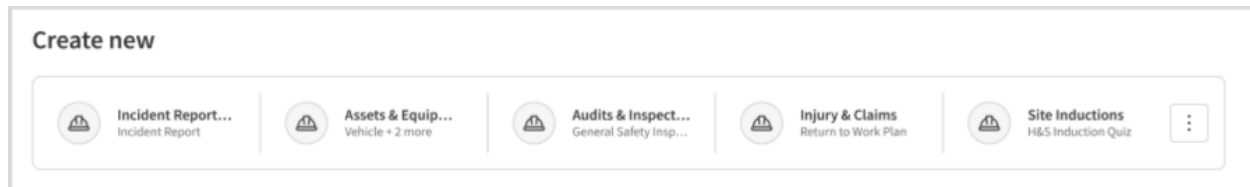
2. Home Components

Let's dive into each of Home's components and outline what you can expect.

2.1. Create New

It all starts with the smart 'Create New' component, giving you quick access to the forms you've used the most. You can also access all your available forms via the vertical ellipsis (three dots).

Design mock-up: Create new component

You'll see the form name, as well as the Module/Register(s) it belongs to.
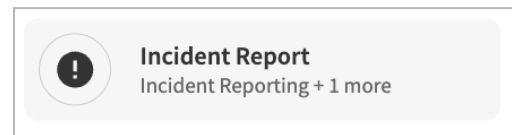
The order of forms in the Create New component is organised by what you, as an individual, have used in the past. If you haven't yet created any pages in ecoPortal before, you will instead see the forms used most by your organisation as a whole.

Note: If you are a brand new ecoPortal customer, the Create New component will not show until you, or others in your organisation, start creating pages.

2.2. To-do list > Tasks

The Tasks component is found in your To do list. It outlines your outstanding in-system tasks and gives you quick access to your Task Manager (by clicking on the Tasks heading).
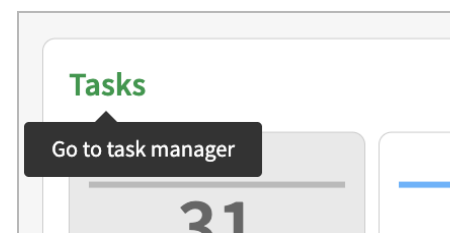
2.2.1. Modifying the task view

Filters provide flexibility so you can enjoy greater control over the tasks you see on screen. For example, use the filter in the top right corner to narrow down your tasks from All time to those created in the last 7, 14, or 30 days.

ecoPortal will remember the last setting you chose the next time you visit.
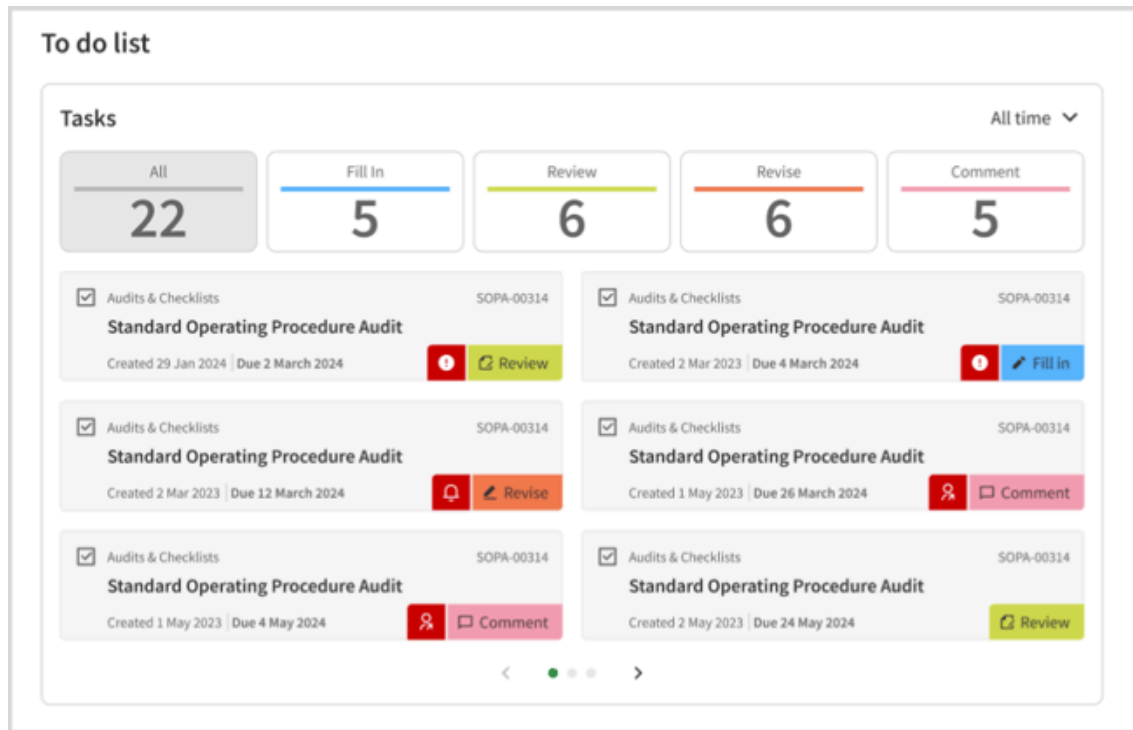
Design mock-up: Tasks component

You can also click on the task type indicators to drill down to tasks of a specific type, so you can have only your Fill in, Review, Revise or Comment tasks displayed.

2.2.2. Overdue and escalation icons

Individual tasks that are overdue, escalated, or both will display red icons that draw your attention to your most pressing tasks. Simply hover over the icon for more information, or click on the task (or Go to page → on the hover pop-up) to go directly to the task itself.

Icon	Meaning
❗	Overdue
👤	Escalated
🔔	Overdue & Escalated
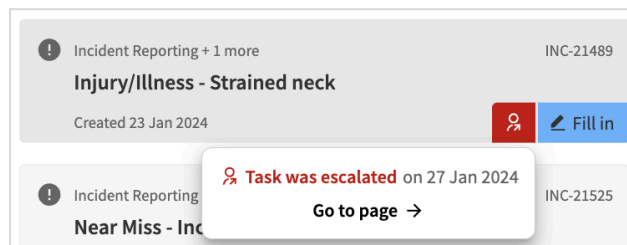
Example of hover pop-up for an escalated task

2.3. To-do list > Actions

The Actions component is found in your To do list as well*, providing you with an overview of your open actions that are not system-related (like Tasks are) and their status. Here you also get quick access to the Actions Manager (by clicking on the Actions heading).

2.3.1. Modifying the Actions view

Filters let you decide what actions you see on screen. For example, you can use the filter in the top right corner to narrow down your actions from All time to those due in the next 7, 14, or 30 days.

You can also switch between a chart or list view of actions. You can also click on a chart segment to jump to a filtered list view, which is especially helpful for keeping on top of actions that are overdue or finding actions where no due date has been assigned.

2.3.2. Overdue Actions

Similar to tasks, if an action is overdue a red icon status is used to help draw your attention to your most urgent actions.
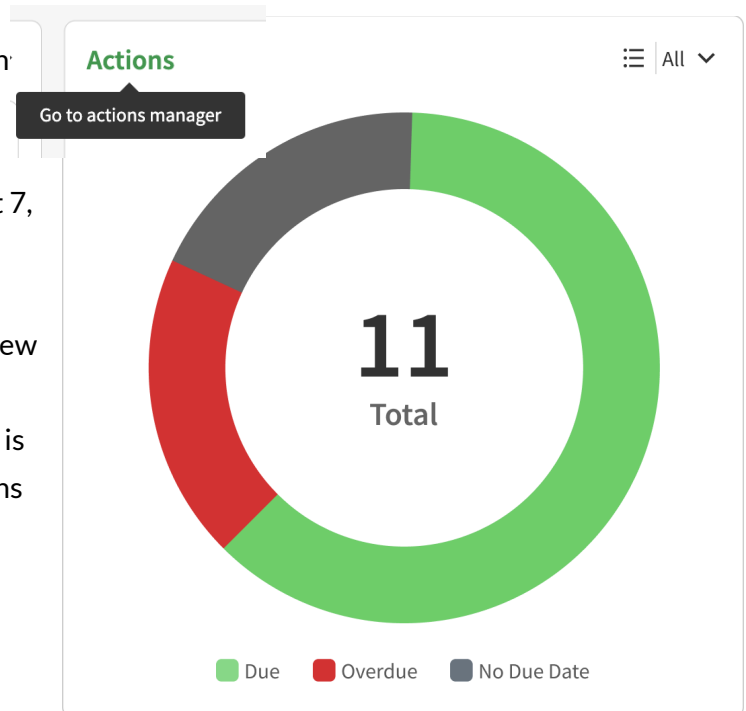
Design mock-up: Actions component (chart view)
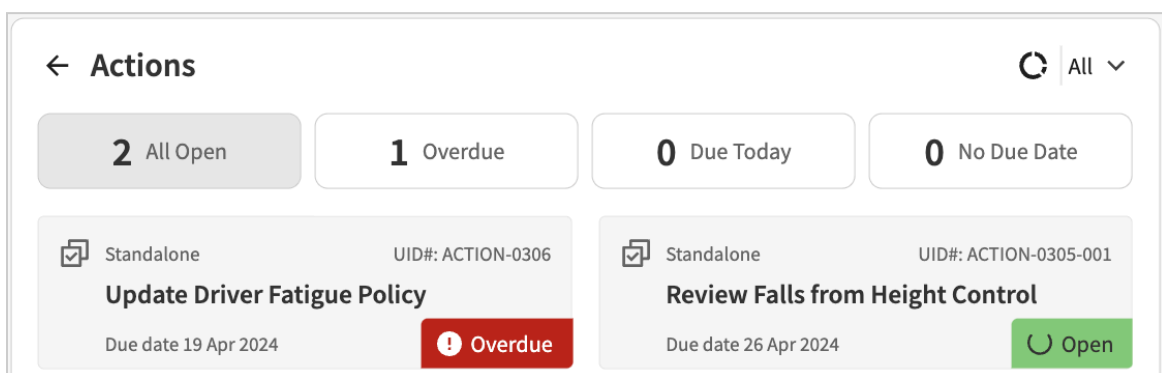
Screenshot: Actions (list view) with overdue status in red

* If your organisation is not using ecoPortal's next-generation Actions Module, you may see a Coming Soon notice where Actions is, or you may not see the Actions component at all.

2.4. Updates > Comments

For the first time, you can see all your open comment tasks and threads you're involved in together, in one place. The Comments component under Updates lets you read the latest comment in a thread, and navigate straight to the page the comment is on with one click–so nothing slips through the cracks.

Design mock-up: Comments Component

The total number of open comments assigned to you is displayed on the Assigned to me tab.
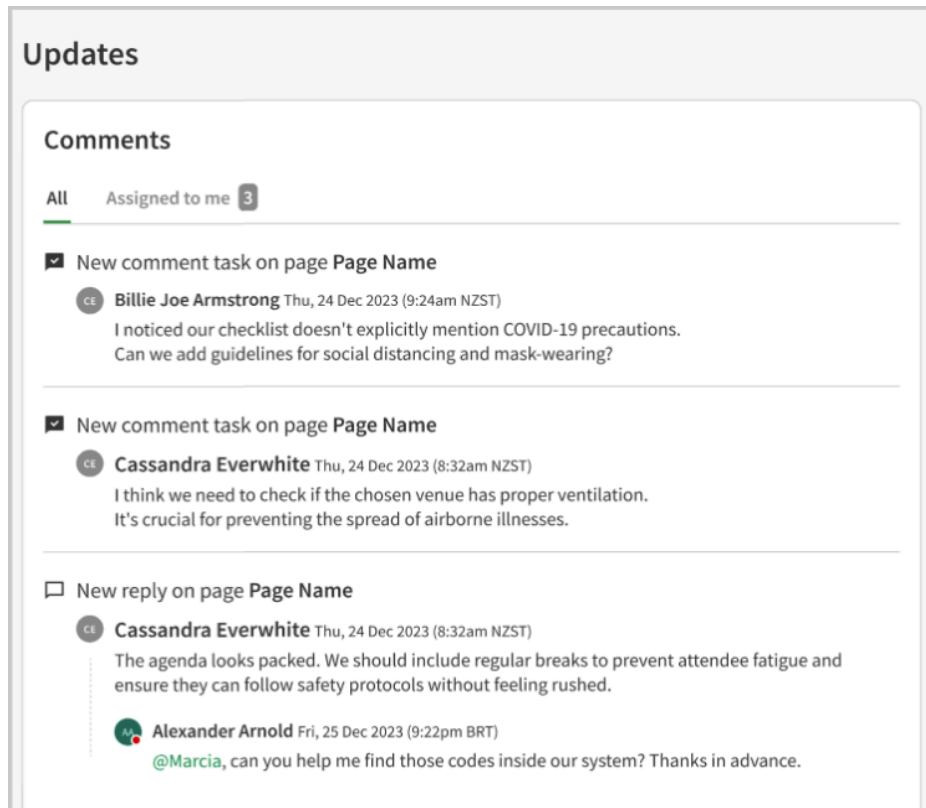
2.5. Updates > Active Pages

The new Active Pages component gives you an overview of pages you're involved in, meaning those you have either created yourself or completed a fill-in or review task on.

2.5.1 Get greater visibility into page progress

Keeping you in the loop on your entries to ecoPortal is one of the best ways for you to see that your efforts make a difference! That's why the Active Pages component lets you see the progress of pages you've created as they move through each stage (while adhering to all permissions and privacy settings). See recently completed pages you've created under the Completed tab– in the order of last updated.

Active Pages

In Progress   Completed

⚠ Incident Reporting + 1 more   INC-21543
Near Miss - aggressive community member
⋯ ✓ ③ ④   Created: 15 Mar 2024 Last updated: 19 Mar 2024

⚠ Incident Reporting + 1 more   INC-21531
Injury/Illness - Occupational violence
⋯ ✓ ③ ④   Created: 07 Mar 2024 Last updated: 07 Mar 2024

⚠ Incident Reporting + 1 more   INC-21526
Near Miss - Manual handling issue
⋯ ✓ ③ ④   Created: 06 Mar 2024 Last updated: 06 Mar 2024

⚠ Incident Reporting + 1 more   INC-21525
Near Miss - Incident in the hotel kitchen
⋯ ✓ ③ ④   Created: 06 Mar 2024 Last updated: 06 Mar 2024

⚠ Incident Reporting + 1 more   INC-21526
Near Miss - Manual handling issue
⋯ ✓ ③ ④   Created: 06 Mar 2024 Last updated: 06 Mar 2024

✓ **Report**
✎ Filled in by   [LA] You

✓ **Assessment**

③ **Investigation**
✎ Fill in   [In Progress]
Assigned to   [LA] You   ⊞ 2 more

④ **Close Out**

INC-21525
l kitchen
ar 2024 Last updated: 06 Mar 2024

Screenshots: Active Pages component and visibility of stage progression of an active page

2.6. Updates > Upcoming Dates

The Upcoming Dates component gives you an overview of upcoming events on pages you have access to.

This is a replica of the Coming Soon component of the legacy My Dashboard, with the exception that you can now also filter items to only show those taking place in the Next 7, 14, or 30 days.

Note: This component was not available during the opt-in period.

Upcoming Dates   Next 30 days ⌄

◎ Contractor Prequalification | Page name
Date of next review   🗓 2 May 2024

◎ Contractor Prequalification | Company XYZ
Insurance Expiry   🗓 12 May 2024

◎ Training | First Aid Course
Next due date   🗓 12 Jun 2024

◎ Hazard | Falling at height
Annual hazard review   🗓 22 Jul 2024

◎ Training | First Aid Course
Next due date   🗓 6 Aug 2024

3. What's Changing?

3.1 How Home differs from the legacy My Dashboard?

With innovation comes change, so here we'll highlight areas that are different to the legacy My Dashboard so you know what to expect.

3.2 Shortcut to Forms

The new Home does not provide a direct replacement to the Shortcut to Forms component found on the legacy My Dashboard.

Home's Create New component gives you quick access to your most-used forms, while recent improvements to the sidebar allow you to navigate to your Modules/Registers fast. If you haven't already, use the new pinning functionality to put your favourite Modules/Registers at the top of the Modules list in the order you want to see them in!
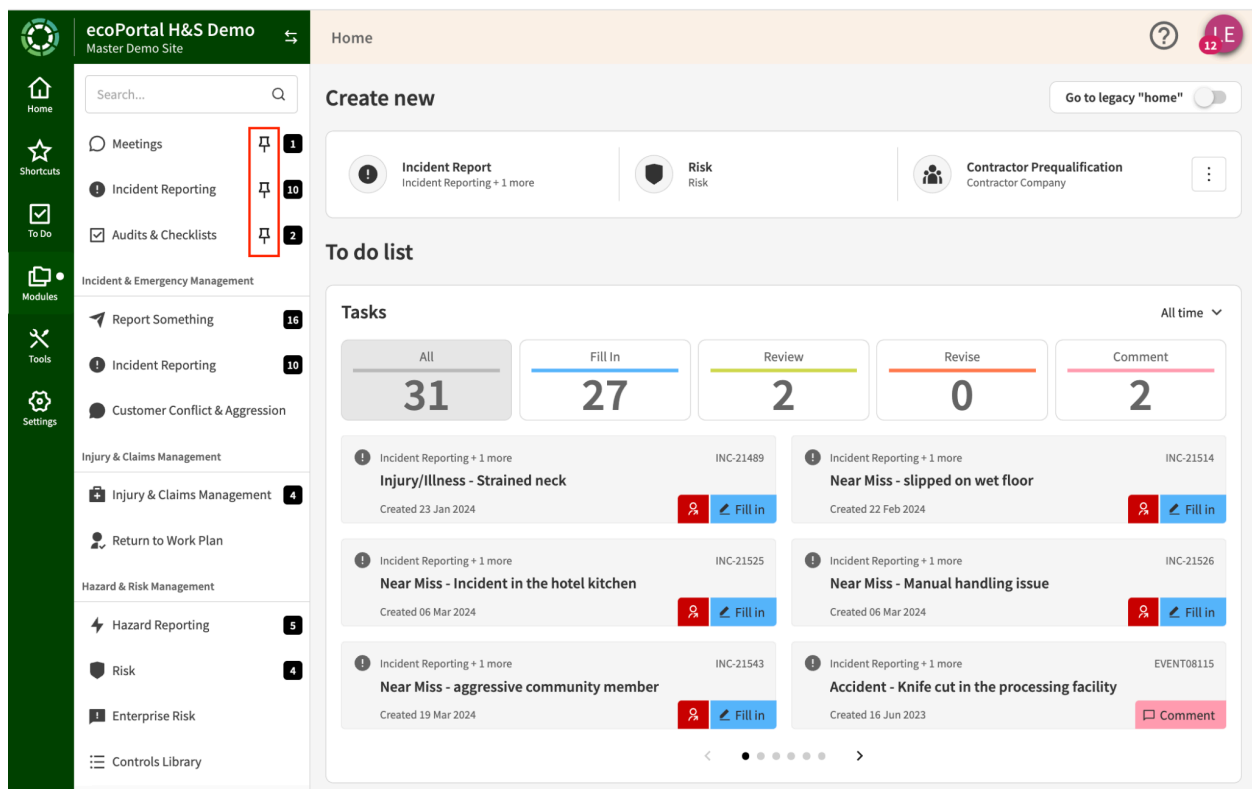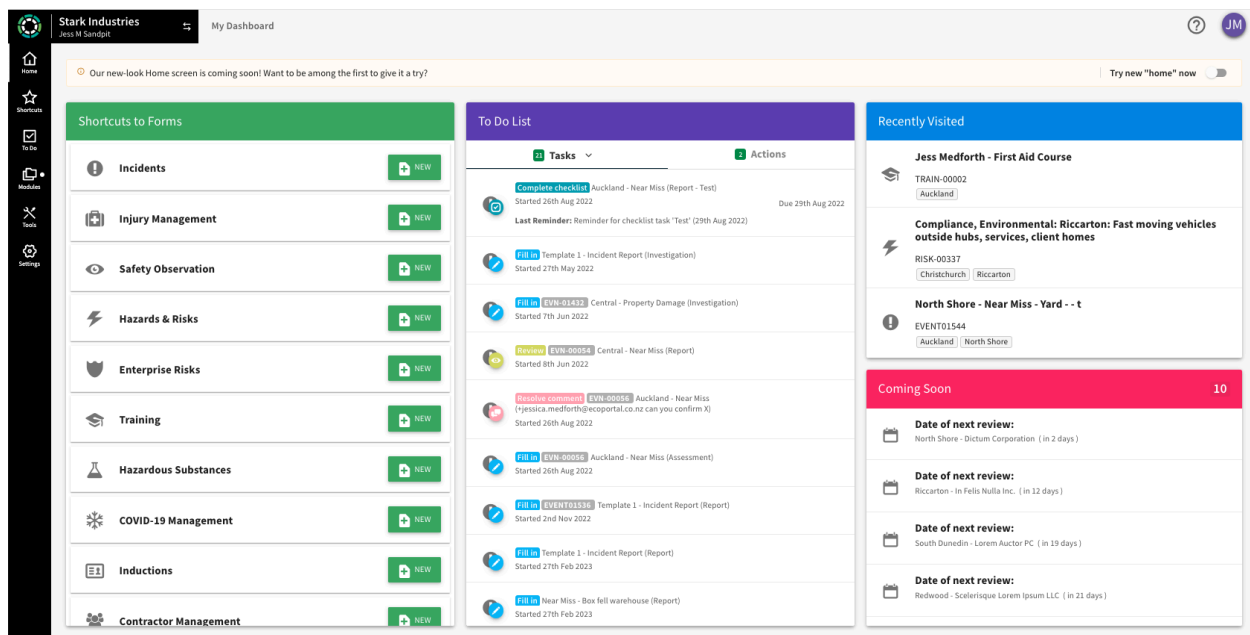

Screenshot of new Home with Sidebar open on Modules, with pinned Modules showing

3.3 Recently Viewed

The new Home does not provide a direct replacement to the Recently Viewed component found on the legacy My Dashboard. Instead, we've focused on surfacing your open tasks, actions, comments and active pages to help you quickly navigate to what's most relevant to you.

Screenshot of the legacy My Dashboard

4. What's Next?

4.1 Upcoming Functionality

Our team is currently working on a Home variation specifically for Supervisors/Team Leaders–providing those with direct reports greater visibility into the activity, tasks, and actions of their team members!

The way the new Home design is built using components allows us to add more components based on your feedback–paving the road for even greater individualisation options on Home ahead.

Keep your eye out for our in-app surveys regarding the new Home design and be sure to share your thoughts, ideas and feedback!

5. Notes for Administrators

Read on for important points ecoPortal administrators should be aware of.

- The new Home design is static, meaning at this stage, it will not be possible to determine which components are displayed to your users as you have done in the past via People Manager > My Dashboard Setup. We intend to build options like this into Home in the future.
- With this in mind, the below My Dashboard Setup, currently found in the People Manager will no longer be there for accounts other than kiosk accounts.

⚒ **My Dashboard Setup**

☑ Sidebar open on wide screens by default   ☑ Link to Registers   ☑ Coming Soon list

☑ Recently Visited Forms list   ☑ Tasks list   ☑ Task count bubbles

---

- The new Home design will not be supported on kiosks. Kiosks will retain the legacy 'My Dashboard' design for now.
- If you have configured a landing page (instead of the default 'My Dashboard') to be the first screen you, and those in your organisation, see after logging into ecoPortal - this will remain unchanged. You will still have quick access to Home via the sidebar.

6. Have Feedback?

We rely on your feedback to continuously improve ecoPortal and your user experience. If you have an idea, suggestion for improvement, or other feedback, let us know about it here!