Agenda

1. AI Insights in EHS
2. Smart & Secure: how we use AI in ecoPortal
3. Our AI features explained
4. Maximising AI Success
5. Real Use Cases and Demo
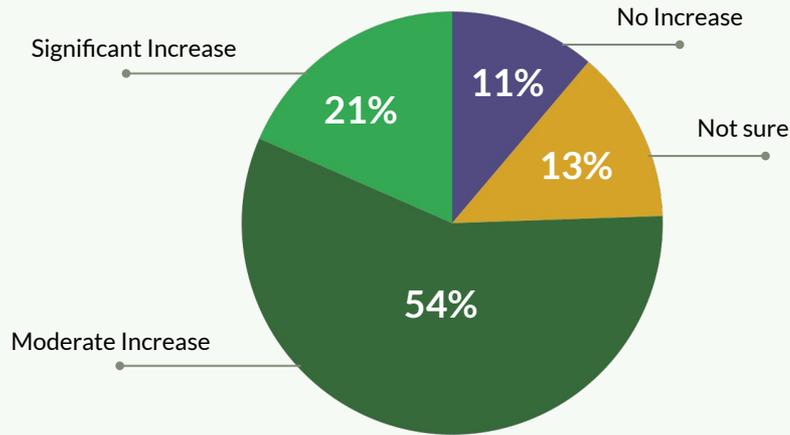6. Prompting 101
7. Prompt Examples
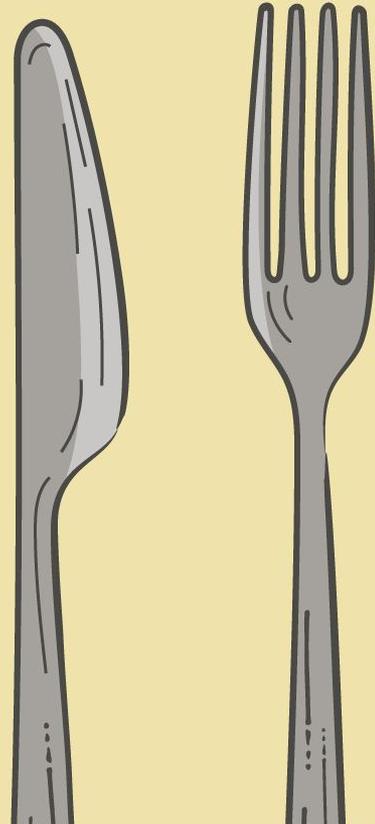
What's slowing down AI adoption in your organisation?

AI Insights in EHS

While most organisations are taking initial, cautious steps into AI, adoption will likely increase rapidly in the near future. **75% of H&S managers expect an increase over the next 12 months**.

Pie chart:
- Significant Increase — 21%
- Moderate Increase — 54%
- No Increase — 11%
- Not sure — 13%

✅ **Top benefits:**

- Reduction in admin time
- Improved reporting quality & speed
- Early risk identification

🤔 **Top concern:**

- Cybersecurity and data privacy

Source: ecoPortal's AI in Health & Safety: 2025 Leadership Pulse Survey
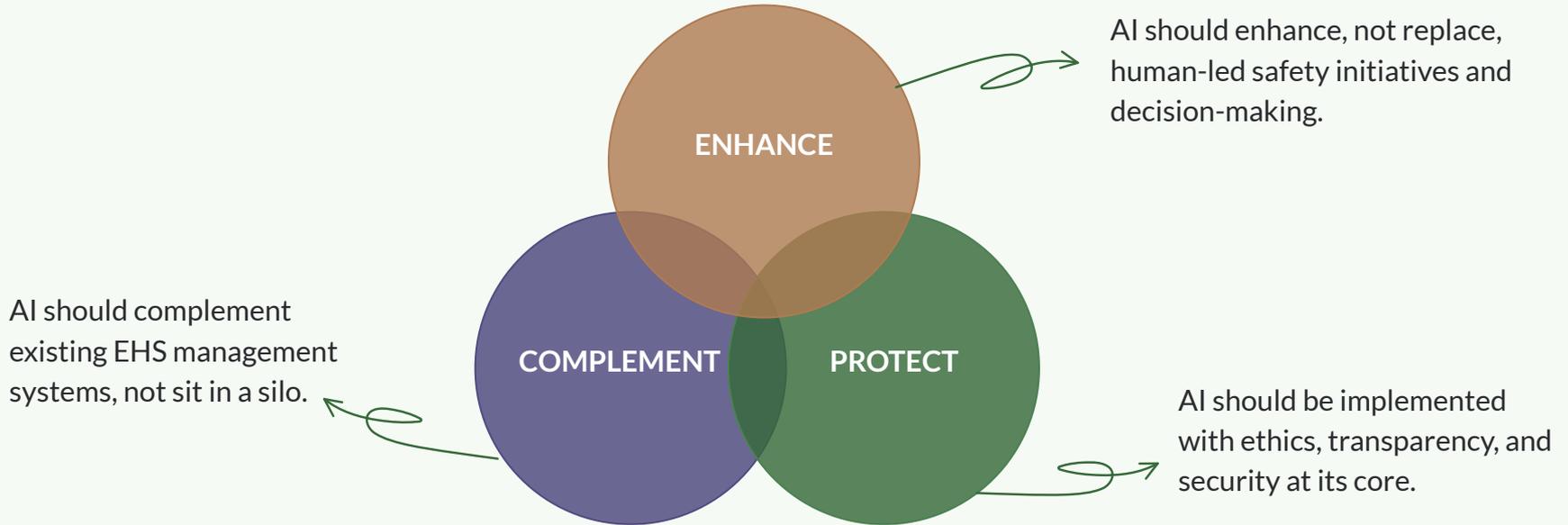
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Smart & Secure

An overview of how we're thoughtfully weaving AI technology into our platform. With a focus on practical tools, our goal is to help you drive efficiency and make it easier for everyone to engage–embedding EHS into your everyday operations.

Responsible AI principles

No training on your data

Secure communication with AI services

Secure processing environments

Provider commitments

Compliance with relevant privacy laws

Human oversight

📖 Learn more in the article Smart & Secure: How We're Using AI in ecoPortal and in our Security Policy Page.

Our Approach to AI

AI in EHS should be practical, secure, and people-centric.
These principles guide our AI development:

ENHANCE

AI should enhance, not replace, human-led safety initiatives and decision-making.

COMPLEMENT

AI should complement existing EHS management systems, not sit in a silo.

PROTECT

AI should be implemented with ethics, transparency, and security at its core.

Our AI Features Explained

Find: get what you need, faster

Smart Form Finder

Based on a natural description, it suggests the right form for the job, so your team is left without a doubt.

Use Case: someone notices a stack of boxes that could fall and hurt someone. They want to report it, but don't know which form to use. They describe the situation and the system suggests the correct report form.

Semantic Search

COMING SOON

Finds exactly what you're looking for based on the meaning of your search, not just exact keywords.

Use Case: a manager searching for PPE violations can now find records that mention missing hard hats, safety glasses, or gloves even when formal terminology or acronyms were not used.

Smart Query

COMING SOON

When searching data in register tables and dashboards, describe what you need in plain English, and it will apply the right filters for you

Use Case: a Site Manager preparing for a monthly review can type a full sentence describing what is needed and instantly see the right filters applied.

Our AI Features Explained

Summarise: the *TLDR* of safety

Smart Summary for Stages

Automatically generates a concise summary of a page stage, so you can understand a case without having to scroll through every field.

Use Case: a supervisor needs to evaluate an incident report. They can use the summary to get a concise overview of key points in the *Report* stage, like what happened, where, and any immediate actions taken.

Smart Summary in Email Notifications

Provides instant context in email notifications, distilling tasks, actions, comments, and updates into clear highlights.

Use Case: an H&S Advisor receives an email about a *Fill-in* task. The message in the email now includes a smart summary of the initial report, giving them a clear overview before they even open ecoPortal.

Smart Email Report

Summarises relevant content directly into your email reports, based on the data in the report.

Use Case: a daily smart email report, where the AI highlights all near misses with a critical potential severity, flagging high-risk situations

Our AI Features Explained

Analyse & Advise: let AI handle the heavy lifting

Smart Fields

Automatically fills relevant content directly into fields by drawing from selected data on a page or even other registers.

Use Case: on the Triage stage of an incident form, a smart select field analyses context to suggest a severity rating, helping promote consistency across teams and speeding up the process.

Smart Assistant

Your personal safety analyst—ask it questions about your data and get instant, conversational answers.

Use Case: when closing out an incident report, a supervisor asks the Smart Assistant for suggestions in bullet-point format on how to prevent similar incidents in the future, which is instantly delivered.

Smart Editor

COMING SOON

A built-in writing tool to help you rephrase, fix mistakes, or translate text directly within a field.

Use Case: an employee whose first language isn't English, needs to record a fault during an audit. They describe it in their native language first, then uses *Translate* to convert it into English.

Our AI Features Explained

Capture: inclusive, mobile-first reporting

Image analysis (web only)

UPDATED

Automatically describes photos, extracts text, and blurs sensitive details. Also extracts text from images inside PDF files (new).

Use Case: a supervisor uploads a photo of a complex site hazard to an incident report. The AI automatically generates a descriptive caption and blurs out bystander faces to ensure the report is detailed while maintaining privacy.

Voice-to-text (mobile only)

Lets your team dictate reports on the move by simply speaking into their device.

Use Case: an employee identified a risk in a loud, busy area. They dictate their observations into the mobile app, and the AI converts their speech into a report.
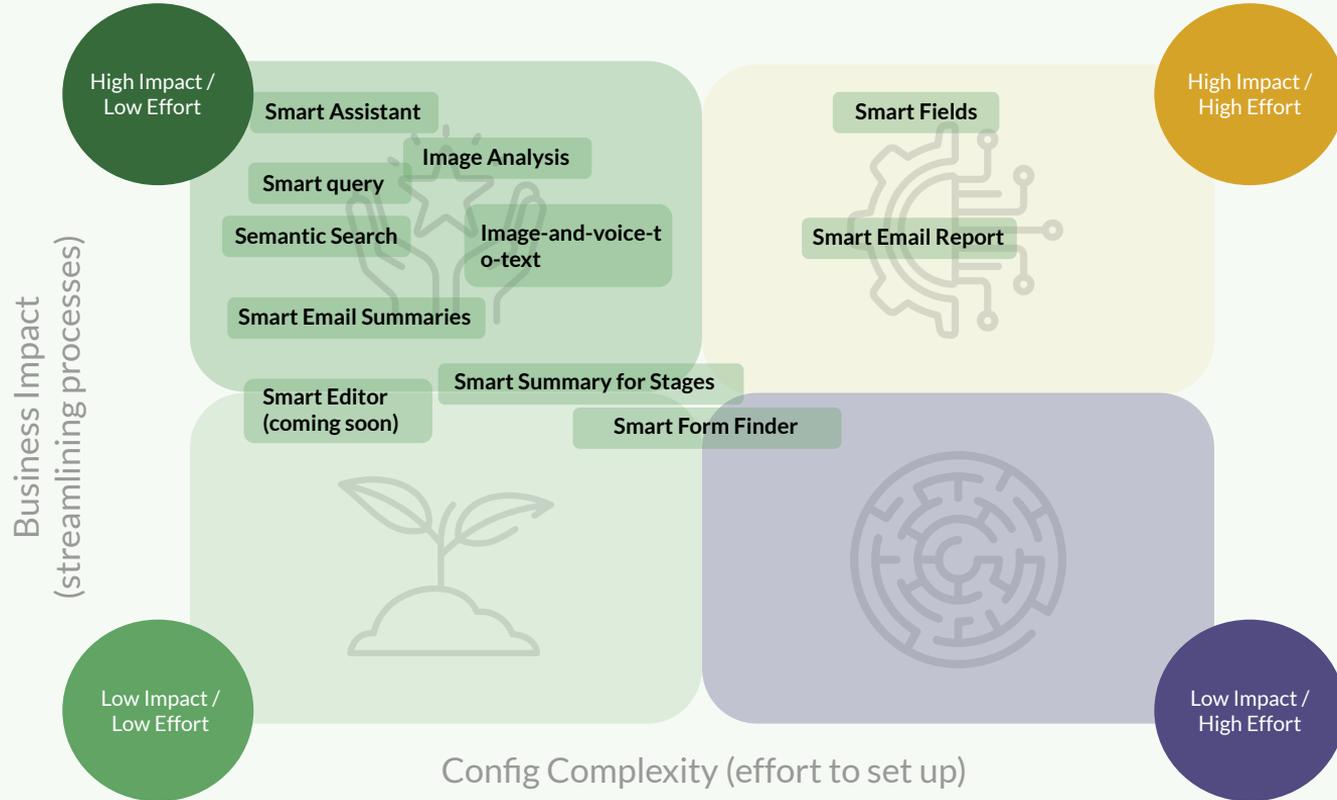
Image-to-text (mobile only)

Instantly turns photos of documents or signs into editable text within your forms.

Use Case: a team needs to reference handwritten minutes from a previous sensitive meeting. They upload a photo of the paper, and the AI instantly transcribes the notes into a clear digital format.

Our AI Features: Impact vs Complexity

High Impact / Low Effort

High Impact / High Effort

Low Impact / Low Effort

Low Impact / High Effort

Business Impact (streamlining processes)

Config Complexity (effort to set up)

- Smart Assistant
- Image Analysis
- Smart query
- Semantic Search
- Image-and-voice-to-text
- Smart Email Summaries
- Smart Fields
- Smart Email Report
- Smart Summary for Stages
- Smart Editor (coming soon)
- Smart Form Finder

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Real Use Cases & Demo

AI in Incident Reporting

USE CASE	FEATURE	BENEFIT	EXAMPLE
1. Automated field selection	Smart Fields	Guided data accuracy	Automate fields such as: cause of harm, agency of harm, incident classification, potential and actual severity, notifiable status, related critical risk, etc.
2. Incident sense check at close out	Smart Fields	Data Assurance	AI flags incorrect dates or categorisation, incomplete fields, etc.
3. Incident-related preventive insights	Smart Fields	Proactive Guidance	Based on an incident, AI suggests the most common controls that should be in place or investigated
4. Incident lifecycle synopsis	Smart Fields	Instant Visibility	A concise incident summary added in the close-out stage is displayed as a column in the register table, allowing for quick side-by-side reviews.

AI in Hazards, Risks, and Controls

USE CASE	FEATURE	BENEFIT	EXAMPLE
1. Control suggestions	Smart Fields	Benchmarking Assistance	Based on the description of the hazard, AI suggests relevant controls, taking into account industry, severity, and additional context.
2. Risk Reflection Tool	Smart Assistant	Review Assistance	A H&S Manager asks the Assistant to audit a risk assessment: *What common industry risks have I missed for this situation?*
3. Severity calibration	Smart Fields	Consistent Rating	AI reviews the hazard description and industry data to suggest a Risk Score, ensuring parity across different departments or locations.
4. Dynamic review summaries	Smart Email Reports	Executive Insight	Automatically generates a high-level summary of all critical risks and their current control status via email for the members of the board.

AI in Emergency Management & Training

USE CASE	FEATURE	BENEFIT	EXAMPLE
1. Simulated scenario creation	Smart Fields	Dynamic Preparedness	AI creates unique emergency drill scripts to keep response teams on their toes.
2. Simulated training tool	Smart Fields	Dynamic Preparedness	AI generates a custom training scenario where workers submit a written response. The system then automatically evaluates their performance against your uploaded SOPs.

AI in Audits & Inspections

USE CASE	FEATURE	BENEFIT	EXAMPLE
1. Automated compliance mapping	Smart Fields	Categorisation Accuracy	AI analyses the notes on a broken harness in an audit and automatically populates a *select* field, categorising it as *PPE* and *Non-Compliant*.
2. Trend analysis	Smart Query	Strategic Visibility	AI allows managers to search directly in their register which sites are failing specifically in training or equipment maintenance, with filters and keywords automatically applied.

AI for Meetings, Safety Observations & Compliance

USE CASE	FEATURE	BENEFIT	EXAMPLE
1. Automated categorisation of meeting topics	Smart Fields	Zero-Effort Data	AI reads the meeting form and automatically populates a *select* field, categorising it as *De-escalation* or *Near Miss Reporting,* providing executive-level visibility into focus areas.
2. File extraction into fields	Image-to-text	Zero-Effort Data	When uploading a handwritten document, AI automatically converts the information into digital fields that can be targeted by reporting tools (filters, charts, etc).
3. Legislative alignment	Smart fields	Legal Assurance	AI reviews a completed ICAM investigation against uploaded legislation to verify all legal compliance requirements were met.

Identifying AI Opportunities

Where can AI add the most value?

📝 **High-volume admin:** tasks where teams spend more time entering data than analysing it (e.g., meeting minutes or report synopsis).

🧠 **Technical knowledge assistance:** complex fields that require specialist H&S knowledge checks.

🔤 **Unstructured data:** valuable information locked in photos, scanned PDFs, or handwritten notes that isn't currently searchable.

📊 **Inconsistent Reporting:** areas where different people describe or categorise the same situation in different ways, making it hard to track trends.

Maximising AI Success

Key Considerations for Successful AI Adoption

Human-in-the-loop: AI should be an assistant, not a decision-maker. A human must always review and take ownership of the final output.

Variable outputs: because AI is probabilistic, the same prompt can yield different results. Rich context helps ensure consistency and accuracy.

Prompt precision: high-quality results require high-quality context. The more detail and specific instructions you provide, the more relevant the AI's response will be.

Data processing limits: AI operates within a "context window," meaning it can only process a specific amount of data at once. For example, the Smart Assistant might break if a page with many stages, files, images, and reference pages.

The power of iteration: perfecting an AI workflow often requires a bit of trial and error. Testing different prompt variations is the best way to find what works for your specific team and the situation at hand.

Prompting 101

🔝 **Front-load:** put your primary task in the very first sentence

👷 **Set a persona:** start with something like *"you are a senior [role] specialist"*

🔻 **Use clusters:** use a broad-to-specific approach. Provide a category + examples (e.g., *"PPE: gloves, boots, hats"*).

🛤️ **Bridge vocabulary:** use synonyms—e.g., *near-miss/close call*.

🔍 **Ground the data:** explicitly tell AI to only use provided info and do not invent details.

📌 **Define boundaries:** list exclusions—e.g., *do not include personal names*.

📖 **Keep it simple:** use direct, professional language, and avoid corporate-speak.

💡 **Use meta prompting:** Ask the AI to help you: *I want to [Goal]. What information do you need from me to give the best result?*

Prompt Example for Smart Fields

Don't

Based on this incident report and relevant legislation, let me know if the event is notifiable under NZ law.

Do

You are a Health and Safety regulator in New Zealand, working for WorkSafe. Your role is to determine whether a reported event is notifiable under New Zealand legislation. Follow this method step by step, using only the information provided:
1. Read the attached "Notifiable event guidance" document carefully. This outlines the legal criteria for an event to be considered notifiable.
2. Review the other provided content describing the reported event.
3. Compare the event details directly against the criteria in the guidance.
4. Return one of the following responses only:
- "Yes" — if the event clearly meets the notifiability criteria.
- "No" — if it does not.
Important:
- Do not make assumptions or draw conclusions beyond what is stated in the content.
- Do not invent information, add context, or refer to external sources.
- Base your response only on the provided documents.
- If information is missing or unclear, assume it was not provided and do not speculate.

Book a Follow Up Session

A 30-minute session with you and your team to assess how the Meetings module can optimise your processes to boost worker engagement.

Questions?

Enter them into the Q&A tab

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