

WHAT'S NEW IN ECOPORTAL

See Your Safety Data More Clearly: with New Dashboard Improvements and More



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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:

Dashboard Improvements

01

Quick Fire Updates

03

02

Page Enhancements



01

Dashboard Improvements

Register Dashboards

Reporting Dashboards

Chart Improvements

Discover improvements across Register Dashboards designed to make filtering and exploring your data more intuitive.

Register Dashboards



Requires Configuration

Financial Year Filters

What it does

Filter your dashboard data to align with your organisation's exact financial year rather than just the calendar year

Why it matters

Streamlines board reporting and eliminates the need to manually select start and end dates

Use Cases

Quick board report

[Release Note - Financial Year Filters](#)



Everyone Gets It by Default

Filter Chips (Coming soon)

What it does

Active filters now appear as "chips" at the top of your dashboard.

Why it matters

You can see all filters applied to a register dashboard clearly and remove them with a single click.

Use Cases

Trusting the data

[Release Note - Filter Chips](#)



Everyone Gets It by Default

Advanced Filtering

What it does

Advanced Filtering lets you combine filters using both AND and OR logic,

Why it matters

It makes it easier to work with complex datasets by helping you find exactly what you need, faster..

Use Cases

Complex data filtering scenarios

[Knowledge Base Article](#)

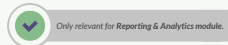
01

Dashboard Improvements

Register Dashboards

Reporting Dashboards

Chart Improvements



Bring your data together in a single, unified view of performance across all your different registers

Reporting Dashboards

Release Date: 30 January

What it does:

Lets you to build dashboards by combining charts, tables, or text boxes from different registers, including the *To Do* area, into one unified view.

Why it matters:

It solves the "silo" problem. Now you can see multi-register insights at a glance and get the full picture of your organisation's safety pulse.

[Release Note - Reporting Dashboards](#)



Only relevant for Reporting & Analytics module.

The screenshot displays the 'Health and Safety Dashboard' interface. On the left is a navigation sidebar with icons for Home, Shortcuts, To Do, Calendar, Modules, Reporting, Tools, and Settings. The main area features a line chart titled 'Incidents over Time' showing the number of incidents from September 2024 to June 2025. The chart shows a peak in March 2025. Below the chart is a legend for 'Number of Incidents'. To the right, an 'Edit Chart' panel is open, showing the chart's title 'Incidents over Time', chart type 'Area', and data source 'Registers'. The 'Registers' list includes 'Incident Reporting', 'Spot It, Fix It', 'Custom Development', 'React module', 'Template Library', 'Solutions Architect', 'Incident & Emergency Management', 'Emergency Management', 'Psychosocial Risk', 'Customer Conflict & Aggression', and 'Injury & Claims Management'. The 'Incident Reporting' register is highlighted with a red box and an arrow. At the bottom of the panel are 'Cancel' and 'Save' buttons.

Reporting Dashboards

Release Date: 30 January

Use Cases:

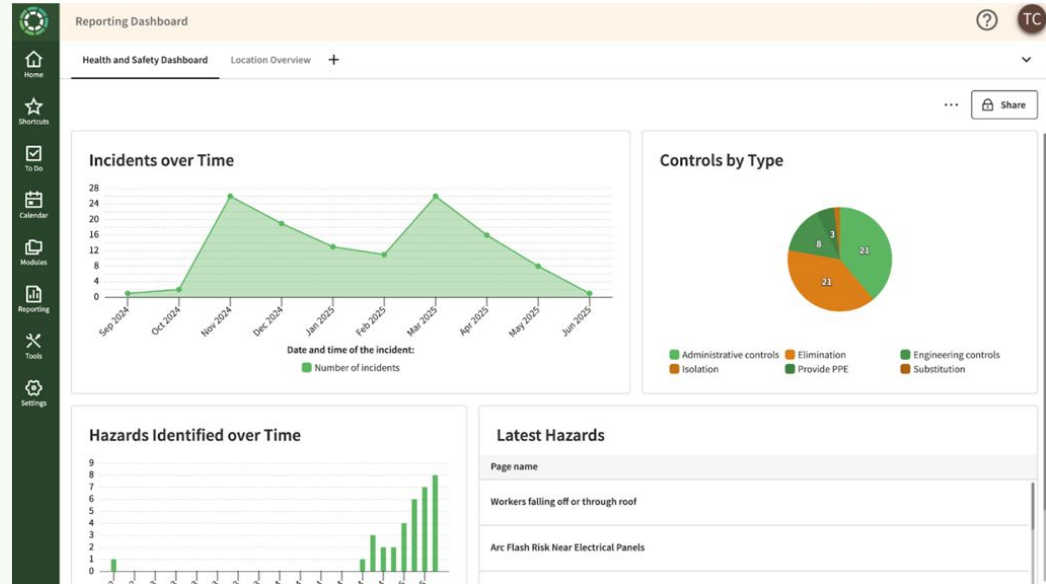
- Location-specific “Key Metrics Overview” dashboard for site managers
- Identifying hidden trends more easily (e.g. Injury Management vs Training vs Actions data may help uncover hidden root causes)

Note: Each individual chart or table can only fetch and display data from one register.

[Release Note - Reporting Dashboards](#)



Only relevant for Reporting & Analytics module.



01

Dashboard Improvements



We've introduced a series of updates across charts to help you create, customise, and better understand your data.

Chart Improvements Across All Dashboards

Chart Page Reference Data

Create *Bar*, *Pie*, and *Heatmap* charts using data from page reference fields.

Use Case:
Spotting the heavy hitters in your risk profile: target the hazard pages mentioned in your near-miss reports to quickly see which hazards are most frequently mentioned.

Duplicate Charts

Copy any chart in one click, then tweak it. No more building from scratch every time.

Use Case:
Regional comparisons: instead of building the same chart for each of your branches, you can build the first one, duplicate it, and simply swap the location filter on each copy

Chart by People

Integrate people and user group data directly into your charts.

Use Case:
Recognising top safety contributors: Rewarding individuals or teams with the highest number of safety observations or near-miss reports.

Use Reporting Structure Classifications in Charts

Create charts linked to a Reporting Structure classification (like 'City' or 'Site'), so they automatically stay up to date as your structure changes.

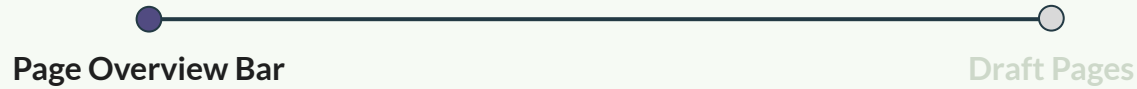
Use Case:
Segmenting near-miss data by location: Segmenting near-misses by "City" or "Country" without having to update the chart every time a new branch is added.



Everyone Gets It by Default

02

Page Enhancements



Discover improvements to the Page Overview Bar designed to make navigating and understanding your pages more intuitive.

Page Overview Bar

Release date: 24 March

What it does

The page overview bar organises key page details into clear, easy-to-navigate tabs. It pulls important information like *People*, *To-dos*, *Page References*, and *Attachments* into one place.

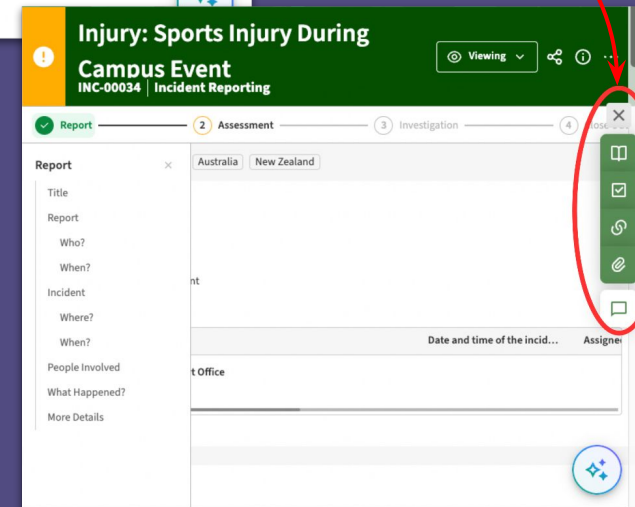
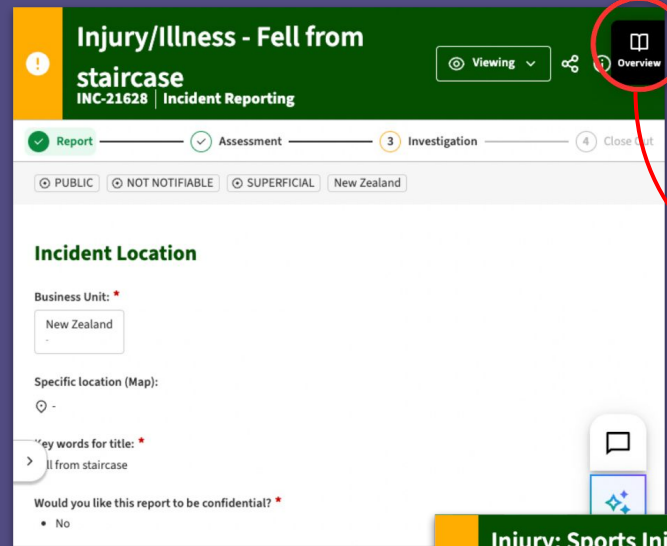
Why it matters

It gives you a clear view of a page without needing to dig through stages. You can find key information faster and stay focused on what matters.

Use cases

Quick page reviews

[Release Note - Page Overview Refresh](#)



Page Overview ✕

Overview 🔍 People 📅 Dates 📊 Smart summ ⌵

Fill in • Investigation

Required fields 13 of 20 filled | Time opened 3d 2h | Due date Tomorrow

Assigned to +22 **Cassandra Everwhite, John Doe, and 22 others**

20 Actions 3 overdue | **8** Comments 2 tasks | **12** People 2 people fields

Files attached 2 file fields | Pages referenced here 1 reference field 20

Activity ⌵

Page created: Mon, 27 Aug
Luc Sengers

Latest activity, 2 hours ago

Cassandra Everwhite updated **Fill in task** in **1** **Report**

- Assigned **2** people
- Unassigned **1** person
- Updated **main assignee**
- Updated **location**

[View history log](#) →

Latest comments Go to section

Stage 1. Report
Upload documentation regarding accident 🔗

John Stones
@Alexander, please update the type of injury to include one of our codes. Thanks!
Thu 17 Sep (10:25 am NZST)

Stage 3. Conclusions
Witnesses

John Stones
You can use the code SCP-1020 for this injury, and for further codes, you can check our health and safety wiki!
Fri 18 Sep (2:45 pm BRT)

To Do ✕

Actions ✓ **Tasks**

Report ⌵

Investigation ⌵

3 **Conclusions** ⌵

Filled in by Completed

John Doe

📄 Review In progress 👤 Assign to ✍️

Due date
Tue, 9 Aug 2022

Luc Sengers ✕

Cassandra Everwhite ✕
Cass, please help by filling out the legal implications section.

Cristiano Ronaldo ✕

4 **Signature** ⌵

📄 Fill in Not started

Will be assigned to staff members

📄 Review Not started

Will be assigned to staff members

Cancel Save

Page references ✕

Related pages 🔗 Referenced here 📄 Referenced on

Condition set

Other reports by the same creator ⌵

Register Injury management 🔗

AND AND 3 more

Search... 🔍 ⌵

State	Page name	Last update
	Hazard: Environmental: Oil Leak... <small>HAZ-09598 Special Cases Taranaki</small>	24 Nov 2024
	Hazard: Environmental: Oil Leak... <small>HAZ-09598 New Zealand Taranaki</small>	24 Nov 2024
	Damage: Illness: Stock <small>HAZ-09598 New Zealand Taranaki</small>	24 Nov 2024
	Damage: Illness: Stock <small>HAZ-09598 Special Cases New Zealand</small>	24 Nov 2024
	Hazard: Environmental: Oil Leak... <small>HAZ-09598 New Zealand Taranaki</small>	24 Nov 2024
	Damage: Illness: Stock <small>HAZ-09598 New Zealand Taranaki</small>	24 Nov 2024
	Hazard: Environmental: Oil Leak... <small>HAZ-09598 New Zealand Taranaki</small>	24 Nov 2024
	Damage: Illness: Stock <small>HAZ-09598 New Zealand Taranaki</small>	24 Nov 2024
	Damage: Illness: Stock <small>HAZ-09598 Special Cases New Zealand Taranaki</small>	24 Nov 2024
	Hazard: Environmental: Oil Leak... <small>HAZ-09598 New Zealand Taranaki</small>	24 Nov 2024
	Damage: Illness: Stock <small>HAZ-09598 New Zealand Taranaki</small>	24 Nov 2024
	Damage: Illness: Stock <small>HAZ-09598 Special Cases New Zealand Taranaki</small>	24 Nov 2024

Attachments ✕

Files 🖼️ Gallery ✉️ Email in

📧 The following emails have been sent to this page ✉️ Send email

Stage 1. Investigation
Mailbox

Sender	Subject
OH Omar Hassan <small>o.hassan@physioAKL.com</small>	Incident report: System out
FL Freya Lawson <small>f.lawson@physioAKL.com</small>	Incident report: Network br
JS John Smith <small>j.smith@physioAKL.com</small>	Incident report: Data leak
MK Maya Khan <small>m.khan@physioAKL.com</small>	Incident report: Hardware f

Emails sent to 615a...6dbf@mailbox.ecoportal.com will appear here

Stage 1. Investigation
Mailbox

Sender	Subject
OH Omar Hassan <small>o.hassan@physioAKL.com</small>	Incident report: System out
FL Freya Lawson <small>f.lawson@physioAKL.com</small>	Incident report: Network br
JS James Smith <small>j.smith@physioAKL.com</small>	Incident report: Data loss
KT Kara Tan <small>k.tan@physioAKL.com</small>	Incident report: Security vu

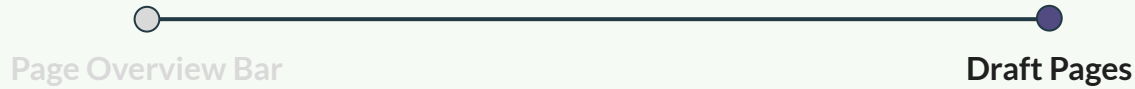
Emails sent to 615a...6dbf@mailbox.ecoportal.com will appear here



Everyone Gets It by Default

02

Page Enhancements



You can now explore improvements to Draft Pages, making it easier to capture, review, and finalise information at your own pace.

Draft Pages

Release date: 20 March

What it does

Draft pages let you save progress while creating a page without publishing it. You can update, delete, or publish when you're ready, keeping everything private until then.

Why it matters

Ensure progress is saved, then finalise the content and details in a private workspace. No notifications are sent or tasks assigned until you explicitly decide to publish the page. Plus, less incomplete or inaccurate data appears in registers and dashboards.

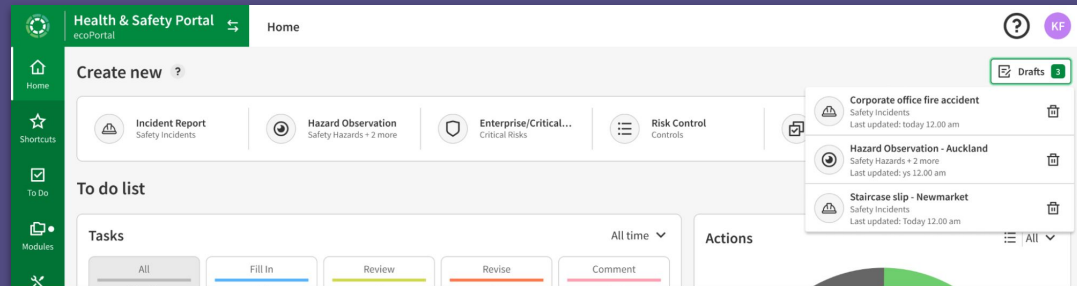
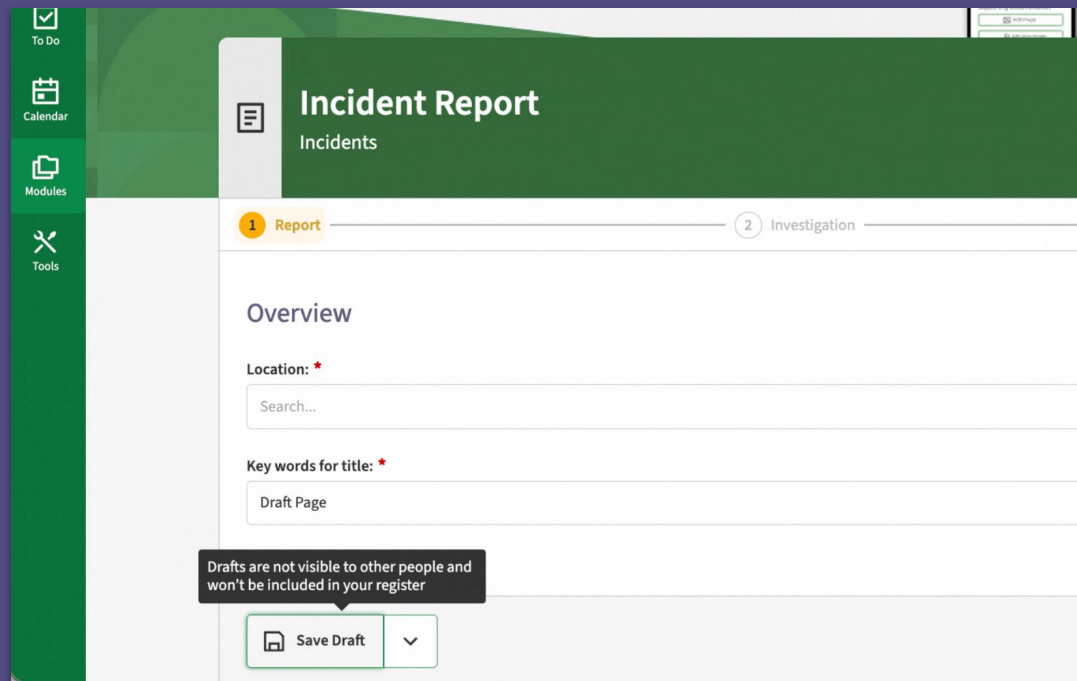
Use cases

Save progress as draft

Draft sensitive information

Capture data on the go

[Release Note - Draft Pages](#)



03



Requires Configuration

Quick Fire Updates

Visitor Management: Geofences

Page Reference Field Shortcuts

You can now explore improvements to Visitor Management, making it easier to manage locations and streamline check-ins.

Visitor Management: Geofences

Release date: 17 March

What it does:

You can now create *geofences* (virtual boundaries on a map) and connect them directly to your organisation's reporting structure locations.

Why it matters:

This allows the mobile app to recognise when a visitor is within a specific geographic range and automatically prompt them to check in to that exact location.

Use case:

Frictionless arrival: contractors are automatically recognised when they enter a site and can check in instantly without searching for the right location.

Streamlined multi-site oversight: teams can move between locations while the app suggests the correct sites, reducing manual errors and saving time.

[Release Note - Visitor Management: Geofence Editor](#)



Only relevant for Visitor Management Module

The screenshot displays the 'Geofences' management interface within the Health & Safety Portal. The interface is divided into several sections:

- Left Sidebar:** Contains navigation icons for Home, Shortcuts, To Do, Modules, Tools, and Settings.
- Top Header:** Shows 'Health & Safety Portal ecoPortal' and a search bar.
- Main Content Area:** Features a map of a city area with two green geofence polygons overlaid. The map includes labels for streets like 'SUSSEX ST', 'ARCH HILL', 'KINGSLAND', 'VIEW RD', 'BURNLEY TER', and 'PAICE AVE', and locations like 'Eden Park' and 'Mount Eden'.
- Right Panel:** Displays details for a selected geofence, including its name ('Main Office'), location ('Mt Eden'), and description ('This is the geofence of the main office'). It also shows the country ('New Zealand') and city ('Auckland').

03



Requires Configuration

Quick Fire Updates



Visitor Management: Geofences



Page Reference Field Shortcuts

Discover improvements to Page Reference Field Shortcuts designed to make accessing forms and completing tasks more seamless.

Page Reference Field Shortcuts

Release date: 25 February

What it does:

Create QR codes that take your team straight to the right form, and attach them to the correct page reference field automatically upon submission.

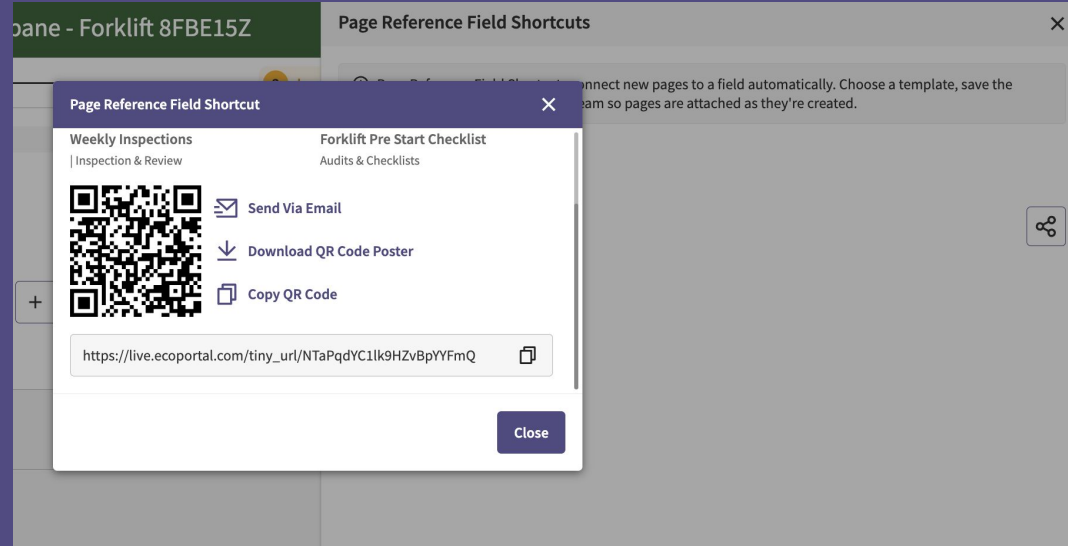
Why it matters:

This makes it faster and easier to complete repeat processes, such as asset inspections, without needing to search for the asset record, know what template to select in the page reference field, or navigate multiple screens.

Use case:

Completing asset inspections faster: scanning a QR code takes teams straight to the right asset and template, speeding up repeat tasks.

[Knowledge Base Article: Page Field Shortcut](#)



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

