

The full spectrum of reporting in ecoPortal

Register Table

- **Filtering**: use these to narrow down the pages visible in a register table view. Filters help you find specific records quickly without having to scroll through everything.
- **Smart Insights on Email Reports**: AI-generated summaries added to scheduled email reports that can highlight critical risks, overdue actions, or patterns. Use it when decision-makers need a quick overview without opening ecoPortal.
- **Smart Query**: a conversational AI that lets you ask questions in plain language and get filtered results or text answers based on data from all registers you have access to. Use it when you want to explore register data without manually building filter combinations.

Register Dashboards

- **Cross-filtering**: click on a chart segment or legend item to filter the entire dashboard by that selection instantly. Use it to drill into a specific slice of data (e.g., one site, one category) without needing to add filters manually.

Reporting & Analytics Module

- **Reporting Dashboards**: combine charts and tables from multiple registers into one unified view. Use it when the H&S team or the executive board need a consolidated picture of safety performance across the organisation.
- **Owner Mode** (*take a look at Dashboard Viewing Modes: Owner vs Viewer*): shows dashboard data based on the dashboard owner's permissions, not the viewer's. Use it when you want executives to see a complete, consistent view regardless of their individual system access.
- **Configurable Dashboard Printing and Snapshots (New)**: configure the layout, add notes, and save point-in-time snapshots to print or export as PDF. Use it to prepare a report for a meeting or keep a historical record for an audit.





 **ecoPortal** | **Lunch 'n' Learn**



The Session Starts Soon

While you're waiting, open Zoom chat and share what's for lunch today!



Sam Williams

Safety Solutions Partner, ecoPortal





 ecoPortal | Lunch 'n' Learn

From Siloed to Strategic

Turn Your Data into Real Insights



Sam Williams

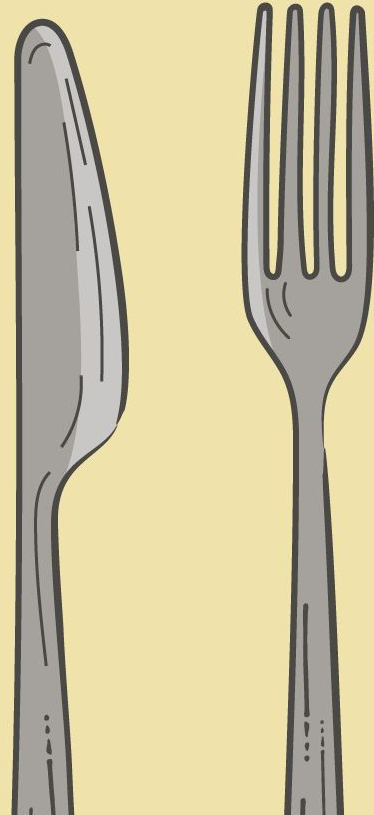
Safety Solutions Partner, ecoPortal



Agenda

1. The Shift to Leading Indicators
2. The Two Jobs of Reporting
3. Use Cases & Demo
4. Practical Tips & What's Next

Have a question during the webinar? Drop it in the Q&A!



————— POLL —————

**What matters most to you
about reporting?**



————— POLL —————

**And what matters most
to your executive team
and board?**



The Shift to Leading Indicators

78%

of EHS leaders rate increasing the use of leading indicator metrics as the most important, or a very important, technology goal

Lagging indicators — LTIFR, TRIFR

Tell you what has already happened. Essential, but always looking backwards.

Leading indicators — near misses, high-severity observations

Tell you what's about to happen, so you can step in before it does.



Source: Verdantix Global Corporate Survey 2025 (N=304, 25 countries)





MetSafe
Metlifecare

WHY LEADING INDICATORS MATTER

From lagging to leading for a stronger, safer future.

RESULTS



80%

increase in Safety Walks & Safety Observations within 6 months



170%

increase in Safety Walks & Safety Observations within 9 months

SAFETY WALKS



Leadership-led engagement



Focus on workplace conditions and risks



Builds visibility and relationships



Encourages listening and learning



Identifies improvement opportunities

SAFETY OBSERVATIONS



Leadership and team member participation



Focus on specific work activities and behaviours



Builds awareness and ownership



Encourages recognition and coaching



Captures both positive practices and risks

FIVE REASONS TO FOCUS ON LEADING INDICATORS



Proactive rather than reactive



Increase leadership involvement



Strengthen safety culture



Recognise positive performance



Help prevent harm before it occurs



**CREATING SAFER WORKPLACES
THROUGH VISIBLE LEADERSHIP
AND POSITIVE CONVERSATIONS**



MetSafe
Metlifecare

Source: [Metlifecare LinkedIn](#)



Reporting's Superpowers

Managing right now

- Open incidents waiting on individual action
- Actions and tasks approaching their due date
- Contractor documents about to expire
- Critical risks | Control verifications

Shaping what's next

- Trends and patterns over time
- Benchmarking across business units
- Leading indicators surfacing early warnings
- Evidence for smarter, proactive decisions

Great reporting does both: one consolidated picture, from daily operations to long-term strategy.

Use Cases & Demo



Your Morning, in One View

A consolidated operational dashboard — everything that needs attention, in one place

FEATURE

Register Dashboards + Table Views + Email Reports

BENEFIT

Frictionless day-to-day clarity

WHAT IT DEMONSTRATES

Operational visibility across incidents, actions and expiry dates

EXAMPLE

A Store Manager opens their dashboard in the morning: open incidents requiring investigation, upcoming contractor expiry dates, open actions and tasks. They click through, resolve each item, and get on with their day.



Consolidated Operational Visibility

Information that was always there — impossible to ignore once it's surfaced

FEATURE

Reporting Dashboards with KPI tiles

BENEFIT

Critical risks surface themselves, instead of waiting to be found

WHAT IT DEMONSTRATES

The case for consolidated, multi-module reporting

EXAMPLE

A dashboard opens on a single KPI: 3 severe or catastrophic events with overdue actions. That number was spread across multiple registers all along, seen together in one view, it demands action.



Cross-register Trend Analytics

From twelve months of incident data to a targeted intervention

FEATURE

Reporting Dashboards (KPI-driven, Analytics)

BENEFIT

Benchmark business units and act on patterns, not anecdotes

WHAT IT DEMONSTRATES

Proactive, leading-indicator decision-making from data trends

EXAMPLE

A manager reviews cause of harm over 12 months, broken down by department and business unit. Manual handling incidents are concentrated in two specific warehouses — both are flagged for targeted intervention.



Filter by Selection

Click any chart segment and the whole dashboard follows — instantly, in place

FEATURE

Interactive Drill-in (cross-filtering) on Register Dashboards

BENEFIT

Stay in the analytical flow — no navigating away, no losing context

WHAT IT DEMONSTRATES

The dashboard as an interactive exploration tool

EXAMPLE

An H&S Manager clicks 'Property Damage' in a pie chart. Every visualisation on the dashboard filters to that category in seconds, a full contextual picture without ever leaving the page.



One Dashboard, Every Audience

Owner Mode vs Viewer Mode — choosing the right lens for what you need to show

FEATURE

Owner & Viewer Mode on dashboards

BENEFIT

A single dashboard that communicates clearly to any audience

WHAT IT DEMONSTRATES

Viewer-driven vs owner-driven dashboard views

EXAMPLE

A Site Manager in Auckland builds a focused dashboard and shares it with the executive team using Owner Mode, so they see exactly what the owner sees. In Viewer Mode (the default), each person sees only the data they have access to.



Ask Your Data Anything

Smart Query — natural-language questions across multiple registers at once

FEATURE

AI-powered cross-register querying (Smart Query)

BENEFIT

Complex analysis that once took real manual effort, answered in seconds

WHAT IT DEMONSTRATES

Cross-register intelligence for strategic decision-making

EXAMPLE

An H&S Manager types: “What are the most common causes of harm across all registers in the last month?” and receives one consolidated answer drawn from several registers at once.



Ready-to-Send Reports

Configure layouts, add a logo, and save point-in-time snapshots, without leaving your dashboard

FEATURE

Configurable Dashboard Printing & Snapshots
(Register + Reporting Dashboards)

BENEFIT

Board-ready reports in minutes, with full control over layout and option to add a logo

WHAT IT DEMONSTRATES

Turning a live dashboard into a polished, point-in-time report, which you can print to PDF or save in the system for 1 year.

EXAMPLE

A Health & Safety Manager preps an executive summary for a leadership meeting. They choose a landscape layout, select the charts that matter, add the company logo and a summary note, and print to PDF in minutes. They save a point-in-time snapshot, so next month they can easily see how the data compares.



Getting More From Your Dashboards



Start with the decision, not the chart: ask what question this dashboard should answer before adding a single visualisation.



One dashboard per audience: what your team needs day-to-day is not what your board needs quarterly, build for each.



Let the data come to you: schedule email reports so the right people get the right picture.



Use Owner Mode for executive views: share a clean, focused picture, exactly as you built it.



Review quarterly: set a recurring reminder to check your dashboards still answer the questions that matter.



Book a consultation with Sam

He's an auditor, he's a manager,
he's the coffee bringer — somehow he's also
available for a consultation.

Sam the
H&S Auditor

Sam the
Manager



Sam the
Coffee Bringer

H&S AUDIT CHECKLIST

- ☒ Site Access
- ☒ Processes
- ☒ Risk Controls
- ☒ Worker Engagement

Looks good! 😊

You got
this!

Safety
first 😊

Coffee →
Better
decisions
😊

Upcoming events

The Elevate Series: **DASHBOARDS**

Register now for our next training session as part of The Elevate Series

ecoPortal | The Elevate Series 

DASHBOARDS

Create dashboards to understand
your data, uncover patterns,
and support better decisions.





Got any feedback?
We'd love to hear



Questions?

Enter them into the Q&A tab



Sam Williams

Safety Solutions Partner, ecoPortal

