

## WHAT'S NEW IN ECOPORTAL

# Unlock Efficiency With Smart Insights for Email Reports, Streamlined To Dos + 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:**

- |                       |    |    |                                 |
|-----------------------|----|----|---------------------------------|
| The Refreshed To Do   | 01 | 02 | Combined Calendar               |
| Smart Fill for Fields | 03 | 04 | Smart Insights for Email Report |
| Mobile Search Refresh | 05 | 06 | Quick Fire Updates              |





01

# → The Refreshed To Do ←

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



# To Do Refresh

**Beta Release: 14 July** (Org-Wide coming soon)

## What it does:

Brings tasks and actions together in one clear view

Adds action and task drawer improvements (tabs, filters, AND/OR logic)

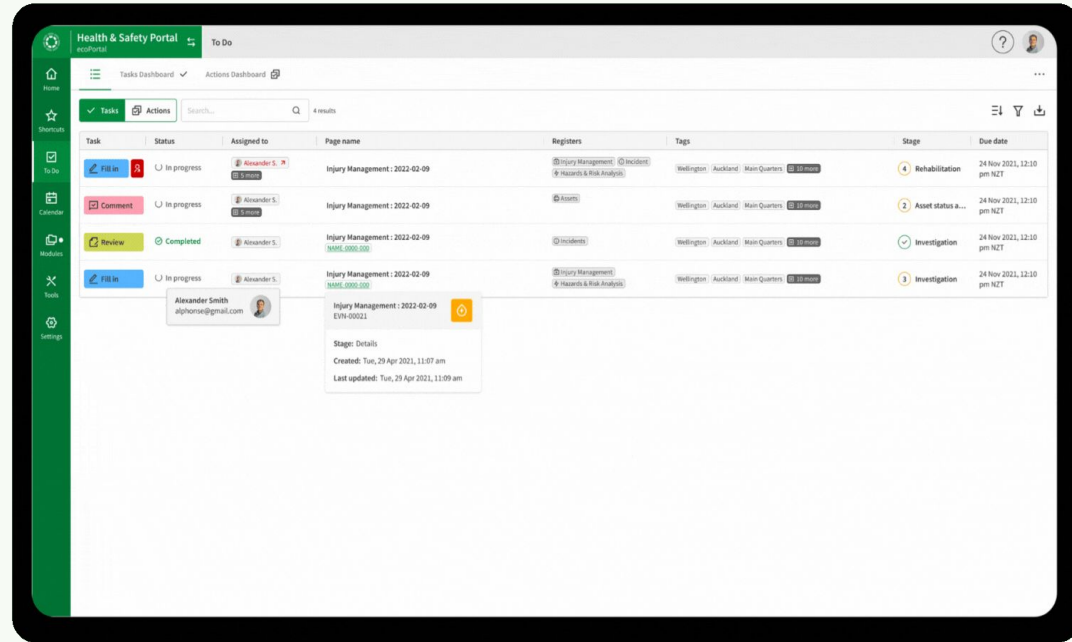
Lets you save filters and turn them into quick filters

Ability to bulk reassign tasks now on Beta

## Why it matters:

Gives a consistent, simpler experience across teams

Saves time, reduces friction, and boosts accountability



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



# To Do Refresh

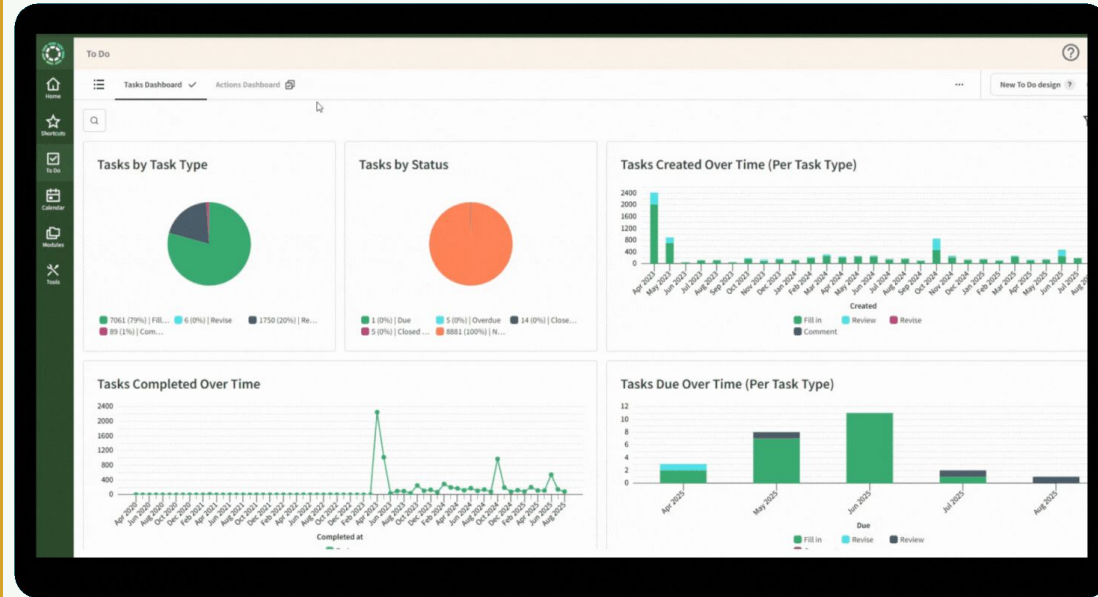
## Standardised Dashboards

Custom dashboards are being replaced by standardised dashboards

Consistent experience across all teams and sites

Reduces setup complexity and support needs

Everyone works from the same reliable view of data



\*These are screen recordings from Beta. Final result in the system may differ slightly.



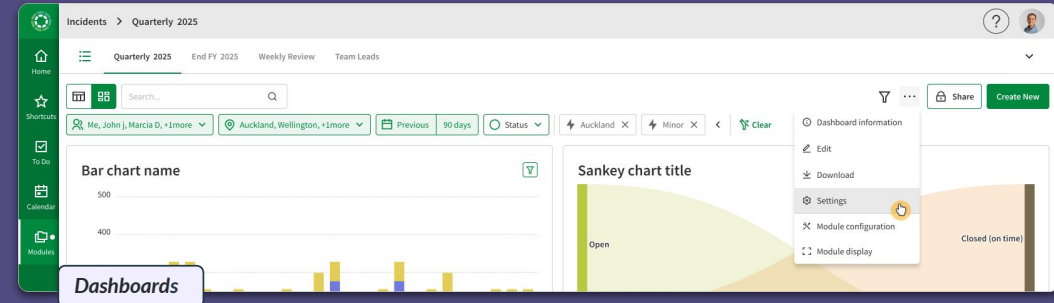
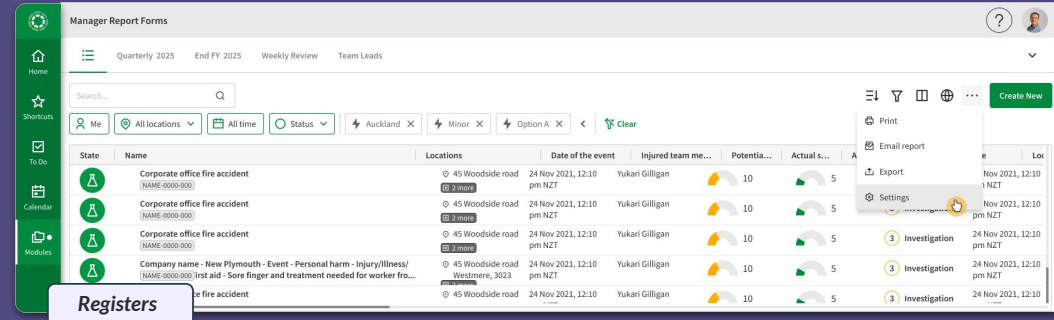
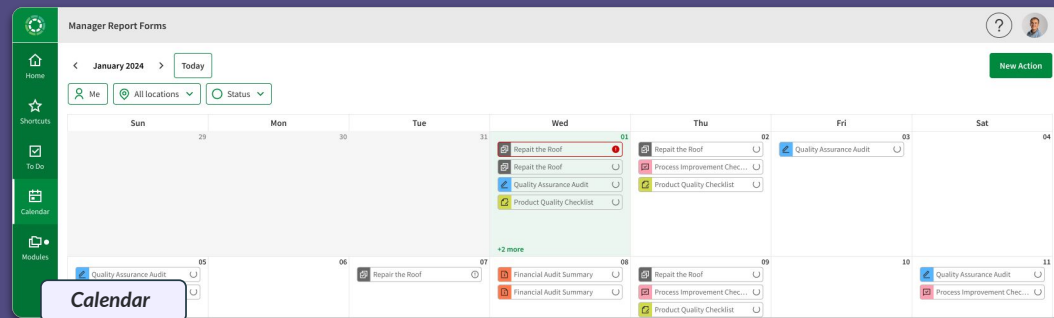
# To Do Refresh

## Filter Widgets - Coming Soon

We're introducing **Filter Widgets** for commonly used filters, giving you a quick and simple way to filter in the table views, default dashboards, and calendar.

Filter widgets to be made available:

- Me
- My Team (my direct subordinates)
- My Default Location(s)
- Status
- Dates: Due date/Created date/Completed date (for tasks)/Closed date (for actions)



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



02

## COMBINED CALENDAR

Where tasks and actions now come together in a single view



# Combined Calendar

- Released on Beta: 14 July

- Why it matters:**

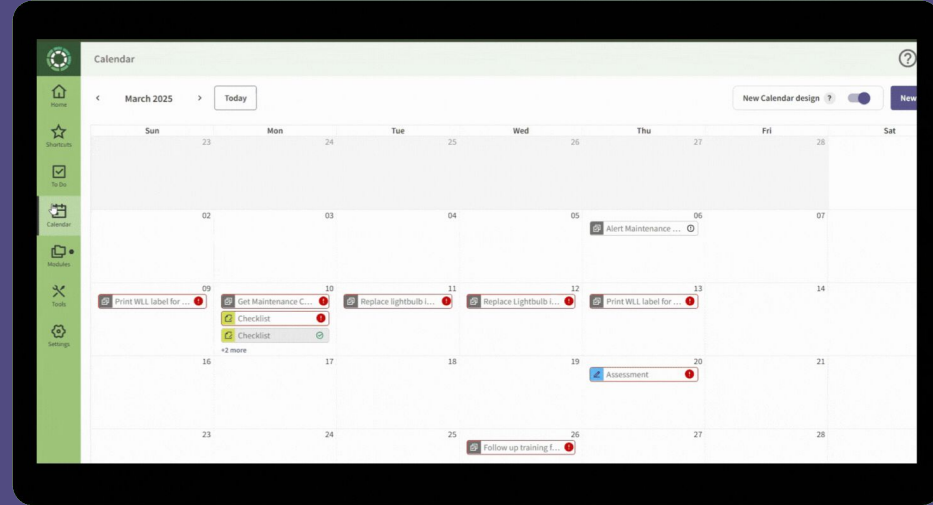
Now you can plan your week in one place, keep deadlines visible, and prioritise what's important.

- Example use cases:**

Monthly planning across a team

Tracking upcoming deadlines

Keeping everyone accountable



\*These are screen Recordings from Beta. Final result in the system might be slightly different.



03

## Smart Fill for Fields

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

*Improved Functionality*

***Recommended: KB/CSM → Change Request***



# SMART FILL FOR FIELDS

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## Feature Overview:

- **Speed up data entry:**  
Say goodbye to manual typing! Smart fields look at information that already exists in your system, whether it's in other fields, files, images, or connected pages, to fill in the blanks for you.
- **Keep everything consistent:**  
Us humans tend to write, format, and categorise information differently based on our own preferences or understanding. *Smart fill* helps standardise how information is entered and categorised, making your reports cleaner and trends easier to spot.
- **Get insights instantly:**  
Stop hunting through pages of information and let *Smart fill* connect the dots for you. It pulls together details from multiple sources to give you the big picture right away. Make informed decisions without leaving the page or digging through mountains of data.





# Smart Fill for Fields

Released: 11 July

## Text Fields

Text fields can now be set up to automatically populate using *Smart fill* when you're completing a form.

## Use Cases

Generates clear, structured summaries from images, descriptions, and actions

Provides a consistent starting point for reports

Reduces review time and helps focus on priorities

The screenshot displays a web application interface for a risk assessment form. The header bar is green and contains the identifier 'PHIM00012' and the title 'Job Demands - Individual Workers, Teams or Department...'. A navigation bar below the header shows four steps: 'Hazard Identification' (checked), 'Risk Assessment' (checked), '3 Controls & Mitigation' (active), and '4 Monitoring & Review'. The main content area has an 'Objective' field with the text 'Implement and document control measures to reduce risks.' Below this is a 'Hazard Identification & Risk Assessment Summary' section, which currently shows 'No information available'. A 'Generate' button with a blue icon is highlighted. Under the 'Control Measures' section, there are five checkboxes: 'Adjust: Provide practical assistance or resources', 'Eliminate: Remove the hazard entirely', 'Redesign: Change the work design or processes', 'Educate: Training for workers and leaders', and 'Promote: Foster a positive workplace culture'. An 'Add Action' button is located below these options. At the bottom, the 'Control(s) Description' section includes '+ Attach Controls' and '+ New Controls' buttons, along with another 'Add Action' button.



# Smart Fill for Fields

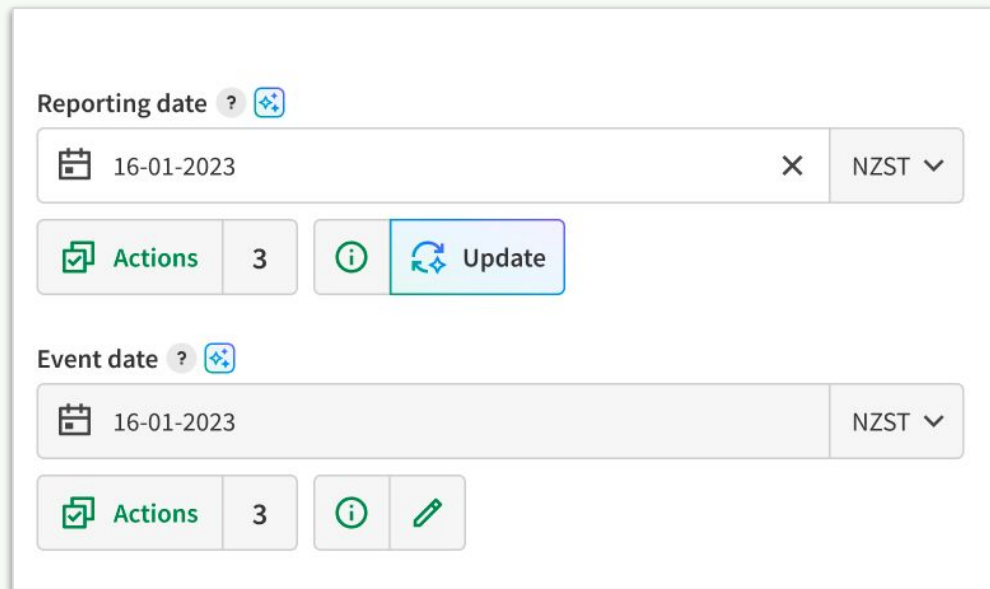
Released: 29 July

## For Select & Date Fields

Similar to text fields, select and date fields can now be set up to automatically populate using *Smart fill* when you're completing a form.

## Use Cases - *Smart fill* on a **Date Field**

*Sarah, a Compliance Officer, uploads safety certificates weekly. Smart fill extracts and fills expiry dates automatically, reducing manual work, errors, and keeping reminders up to date.*



The image displays two design screens for a form, illustrating the 'Smart Fill' feature for date fields. Both screens show a date field with the value '16-01-2023' and a time zone dropdown set to 'NZST'.

**Top Screen (Reporting date):**

- Field label: 'Reporting date' with a help icon (?) and a smart fill icon (+/-).
- Field value: '16-01-2023' with a clear icon (X) and a time zone dropdown 'NZST'.
- Actions: A button with a checkmark icon labeled 'Actions' and a count of '3'.
- Update: A button with a circular arrow icon and the label 'Update'.

**Bottom Screen (Event date):**

- Field label: 'Event date' with a help icon (?) and a smart fill icon (+/-).
- Field value: '16-01-2023' with a time zone dropdown 'NZST'.
- Actions: A button with a checkmark icon labeled 'Actions' and a count of '3'.
- Edit: A button with a pencil icon.

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



# Smart Fill for Fields

Released: 29 July

## For Select & Date Fields

Similar to text fields, select and date fields can now be set up to automatically populate using *Smart fill* when you're completing a form.

## Use Cases - *Smart fill* on a Select Field

*John, a Safety Manager, needs consistent incident ratings. Smart fill analyses context to suggest a Severity Rating, improving consistency and speeding up triage*

Description \* ?

While walking through the warehouse at approximately 10:15 AM, an employee slipped on a wet floor near the loading dock. The area was not marked with a wet floor sign. The employee sustained a minor ankle sprain and was treated on-site. The hazard was cleaned immediately and signage was placed to prevent further incidents. An investigation is underway to det...

Hazard category ?

☐ Fire

☐ Toxic Gas Release

☐ Ergonomic Hazard

☐ Radiation Exposure

☐ Biological Contamination

☐ Chemical Spill

☐ Confined Space Entry

☐ Cybersecurity Threat



Generate

Corrective actions \* ?

Actions 0

✓ Closed 0

🔄 Open 0

🕒 Overdue 0

+ New Action

+ Attach Action



# Smart Insights for Email Report

*Smart Insights* turns raw data from email reports into clear AI-generated summaries.



# Smart Insights - *Coming Soon*

## What it does:

Smart Insights turns email reports into clear AI-generated summaries. You choose what the AI analyses and how the insights are structured.

## Why it matters:

Quick, relevant insights save time and help leaders decide faster, analysts focus on improvements, and coordinators ensure accountability.



# Smart Insights - Coming Soon

## Example use cases:

**Executive briefing:** a weekly overview of overdue actions and open reports delivered in one paragraph

**Risk spotlight:** immediate visibility of high severity near misses flagged automatically

**Accountability:** overdue tasks listed by owner with missing data highlighted before an audit

### Description

This report provides a periodic summary of incidents reported across the workplace, including spills, safety hazards, near misses, and injuries. Use this data to monitor trends, ensure timely follow-up, and support continuous improvement in health and safety practices.

#### Overview

There are 20 new entries, with 16 open, 3 closed, and 1 archived. A total of 12 actions are currently open, with 3 overdue.

#### Key Highlights

- Operative fall from height resulting in a Lost Time Injury (LTI) (INC-00125).
- Chemical spill in Warehouse B - Chemical Store (INC-00132).
- Severe burn from steam pipe resulting in a Lost Time Injury (LTI) (INC-00131).

#### Key Highlights

- Warehouse A is a hotspot, with multiple incidents reported, including forklift collisions (INC-00130), near misses (INC-00123), and a load shift (INC-00127).
- Forklifts are frequently involved in incidents, as seen in reports INC-00130, INC-00123, INC-00127 and INC-00136.

Open ecoPortal

① Smart insights are based only on the entries shown in the table below

\*Some of this content was generated using AI. [Learn more about AI in ecoPortal.](#)



05

# Mobile Search Refresh

The *Entries* screen is now a powerful *Search* that makes pages and actions quick to find!

Improved Functionality

***Recommended: Knowledge Base/Self Training***



# Mobile Search Refresh - Coming Soon

## What it does

*Entries* will be replaced with a powerful search experience covering both pages and actions, making it easier to find what you need on mobile.

## What's Changing on *Home*:

Use the universal + icon to create new pages and actions.

See your ecoPortal site name (and company name if it's been set up) in the app header.

When you tap on your avatar the side panel now opens from the right (not the left).

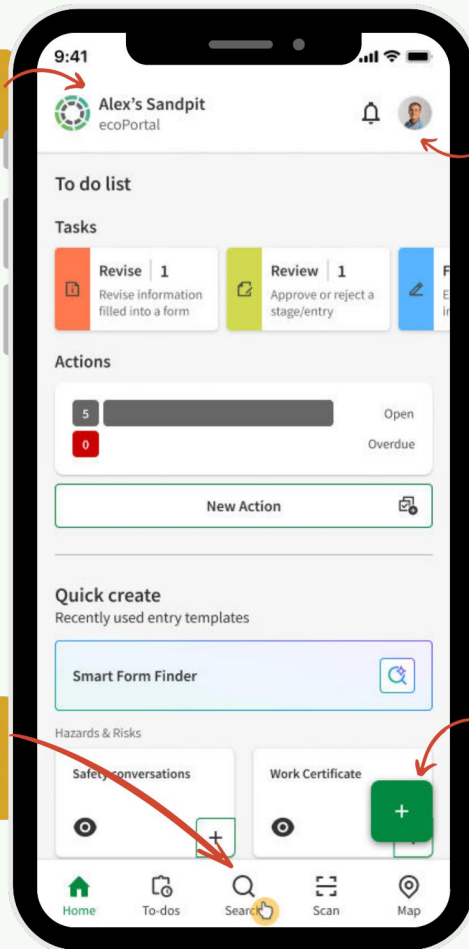
The search bar has been replaced by the new *Search* screen (found where *Entries* was)

Clearly see your ecoPortal site name

Your profile now opens from the right

*Entries* is now *Search*: find pages and actions with the search improvements here

Use the universal + create button to start new pages or actions





# Mobile Search Refresh - Coming Soon

## What's New in Search:

Search for pages and actions using keywords via the search bar.

Quickly narrow down the results using an extensive list of **filters**.

**Save your favourite searches** so you can reuse them as many times as you like.

**Page cards** include more information, helping you quickly find the right one.

**Action cards** include more information, so you can easily tell them apart.

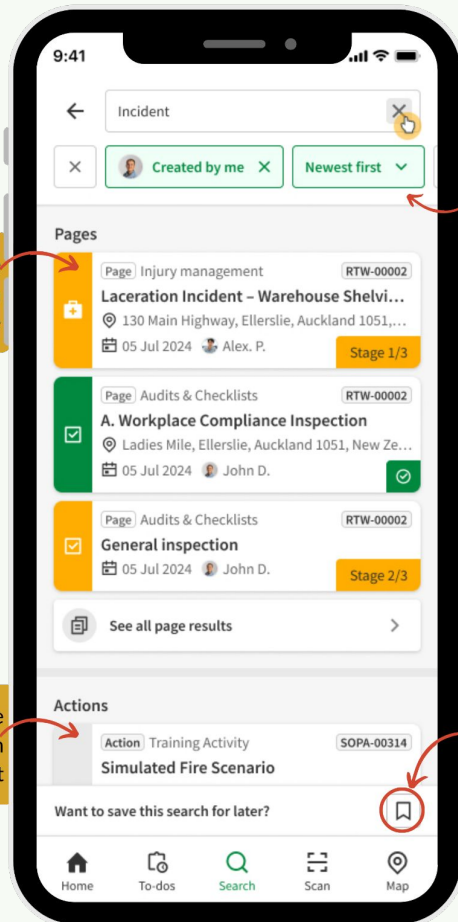


**Page cards** include more details so you can quickly find the right one

Narrow down results in one tap with **filters**

**Action cards** include more details so you can easily tell them apart

Save searches so you can reuse them later





# Priority Data for Offline Use

Do your field teams rely on using ecoPortal Connect offline?

- ***What is priority data?***

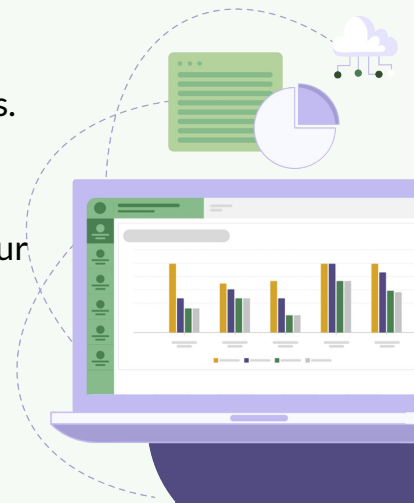
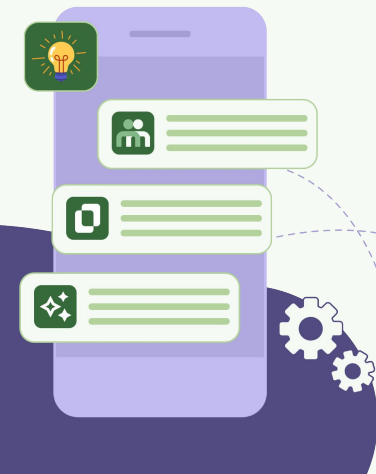
To improve the offline mobile experience, in the coming months we'll be updating how the app syncs and stores data when offline to prioritise pages that is directly relevant to your teams and their work.

- ***Many pages will automatically sync***

Including pages the person has created, has an action or comment assigned on, requires their input or review, and recently opened pages.

- ***Custom priority data***

Raise a **change request** to define which other pages are critical for your offline teams, and we'll set it up for you ahead of the release.





06

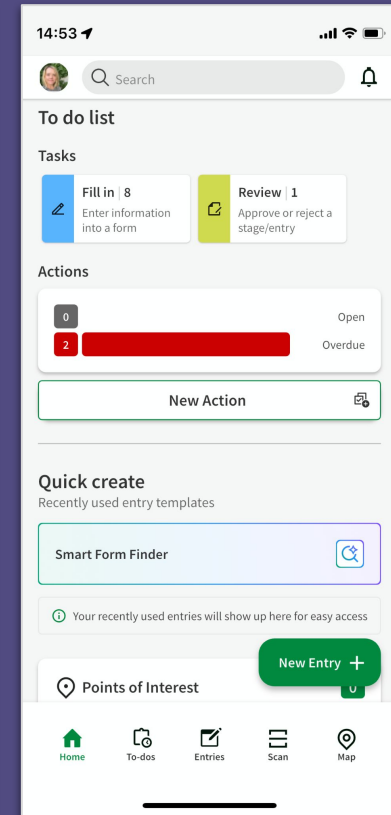
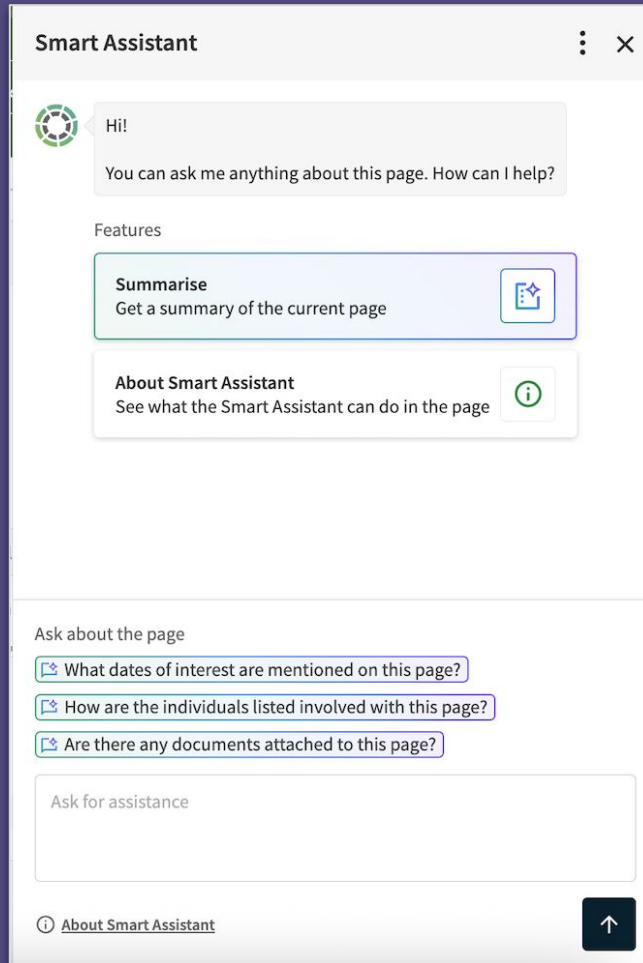
## Quick Fire Updates

A quick round-up of recent improvements  
across ecoPortal



# Quick Fire Updates

- A new look for AI features
- Owner Mode
- SCIM API for People & GraphQL API for Pages





# Quick Fire Updates

- A new look for AI features
- Owner Mode
- SCIM API for People & GraphQL API for Pages

**Dashboard information** [X]

**Name \***  
Actions Dashboard

**Description**

**Data displayed ?**  
Based on owner's access permissions

Owner [v]

Cancel Confirm

When owner is selected, dashboards shared with others will display data in accordance with the owner's access permissions. This may expose data that the viewer does not have access to.

**Dashboard information** [X]

**Name**  
Actions Dashboard

**Description**  
Actions in the past 12 months.

**Owner**  
John Smith

**Data displayed**  
This dashboard displays data based on the viewer's access permissions. Charts on this dashboard only display data you have access to.

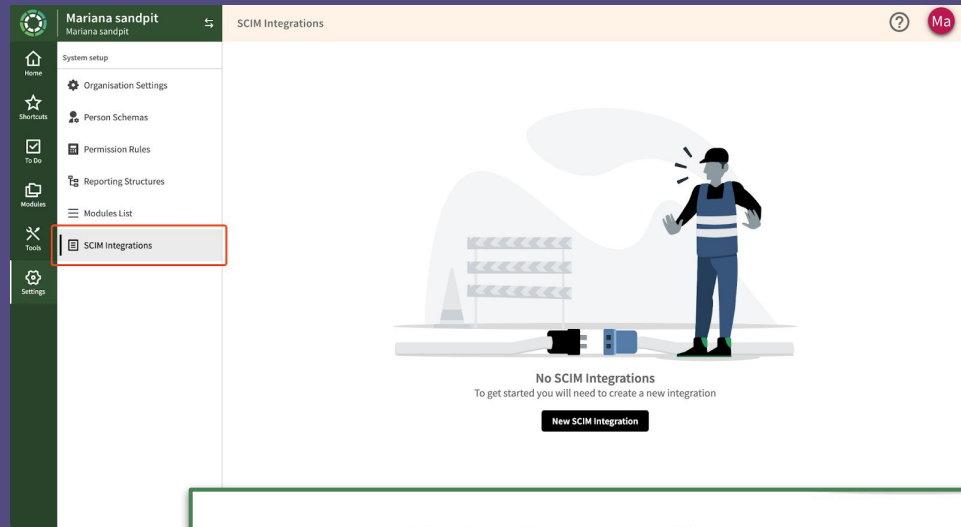


# Quick Fire Updates

A new look for AI features

Owner Mode

SCIM API for People & GraphQL API for Pages



**No SCIM Integrations**  
To get started you will need to create a new integration

**New SCIM Integration**

**Action:** raise a support ticket and let us know who needs to be given access to set up SCIM.



# What's New Features – Setup Guidance

*Here's a quick guide to what we covered today. Some features you can start using right away, others may need you to raise a change request so we can help you set them up.*

## ***No action required***

***To Do***

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***Calendar***

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***Mobile Search Refresh***

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## ***Raise a change request/ Self-configuration required***

***Smart Insights for  
Email Report***

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***Smart Fill for Fields***

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***Mobile priority data update***

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# Drop In-Training Sessions

*Join our upcoming drop-in training sessions with Sam to explore the latest improvements.*



*Bring your questions and see how these updates can make your daily work simpler and faster.*





# 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

