

WHAT'S NEW IN ECOPORTAL

Engaging every worker in safety: the latest in AI, Mobile, 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:

Mobile updates

01

02

Smart editor

Email notifications get smarter

03

04

Visitor Management improvements

Quick fire updates

05

06

ecoPortal Help Centre revamp



01



Everyone Gets It by Default



Mobile Updates



The latest updates in our mobile app, helping everyone stay connected,
and safe on the go

Mobile Search Refresh

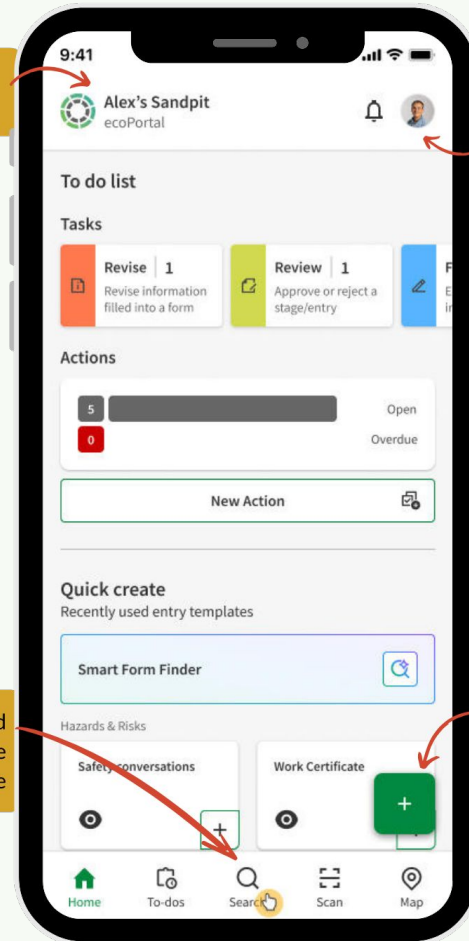
Release date: 9 September

What it does:

The *Entries* screen has been replaced by *Search*, your new go-to place to find pages and actions. You can now search using keywords, or mine for information using recent searches and convenient filter suggestions.

Save your favourite searches to reuse them as many times as you like or delete the ones you no longer need.

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



Clearly see your ecoPortal site name

Your profile now opens from the right

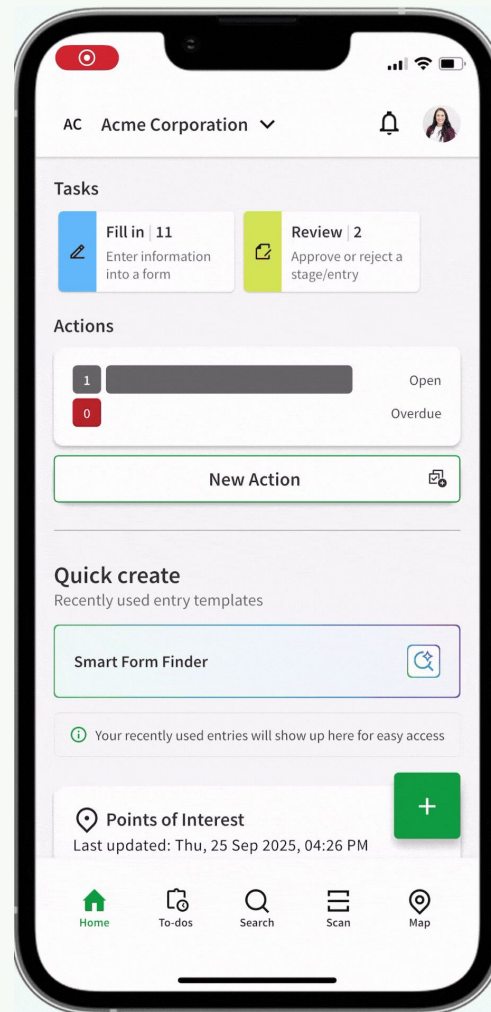
Use the universal + create button to start new pages or actions

Mobile Search Refresh

Example use cases:

Find anything, faster:

No more endless scrolling. Mine for information using keywords, a variety of filters, and even save your favourite searches to use again and again.

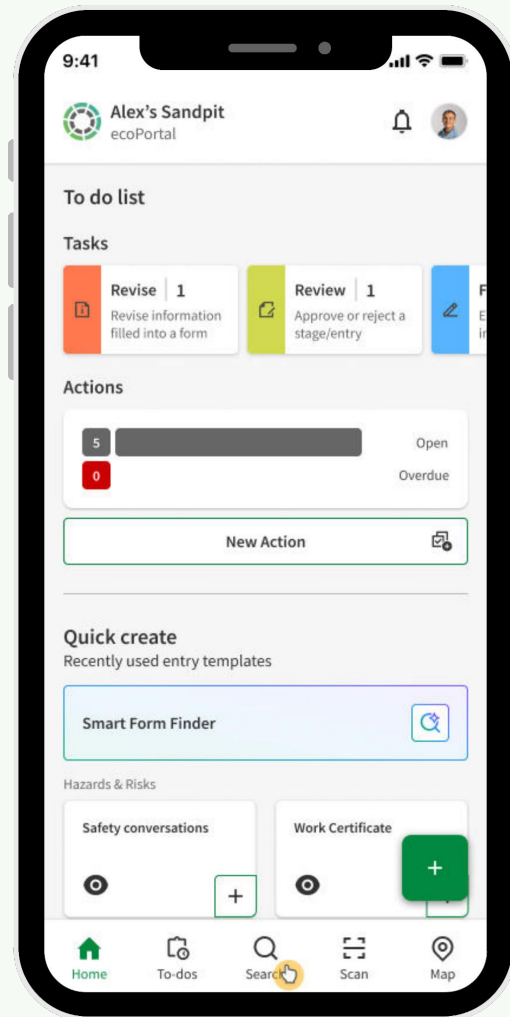


Mobile Search Refresh

Example use cases:

See what matters at a glance:

With clear labels, UIDs, and creator details visible at a glance, you can identify the right Page or Action card without needing to click through.



Mobile Register Grouping

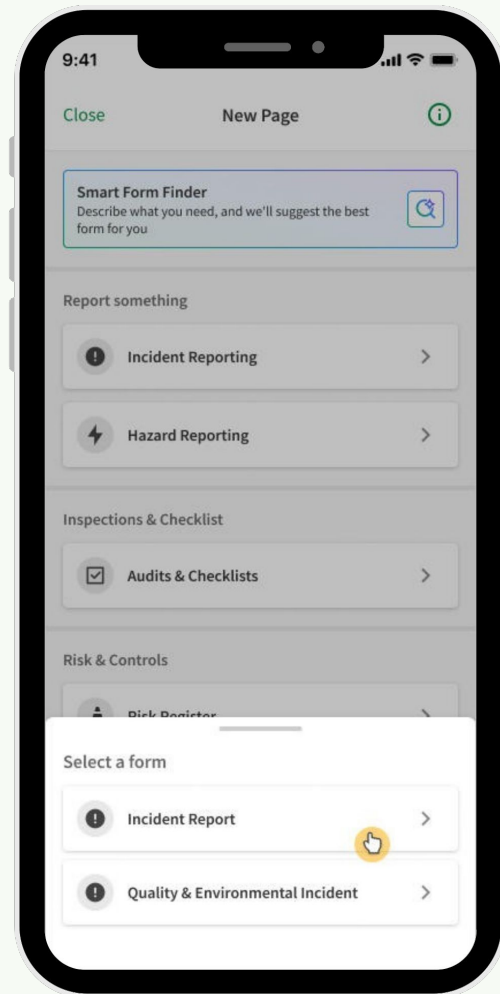
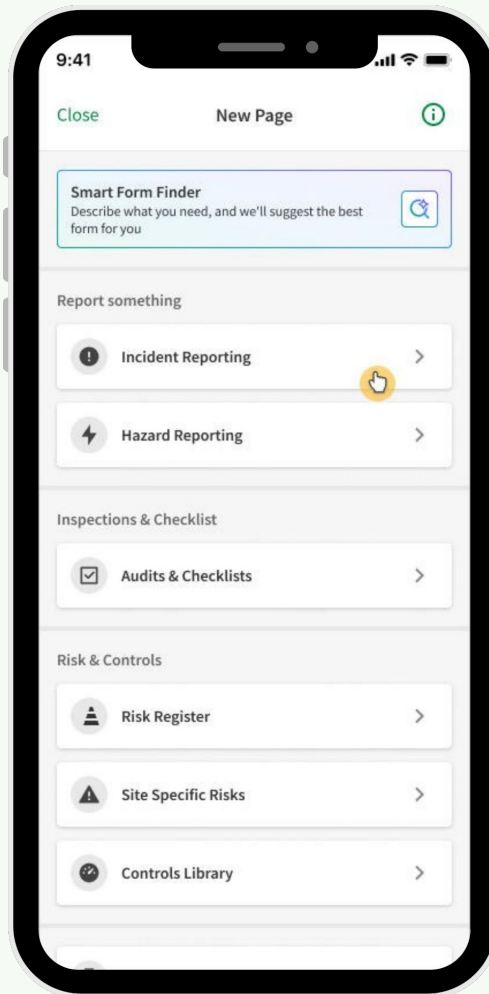
Release date: 29 September

What it does:

Forms are organised by register, so you can easily find and select the form they need from the *New Page* screen.

Why it matters:

Registers are stacked and grouped in the same way as the web app, so they can enjoy the same smooth and consistent experience no matter what device they're using.



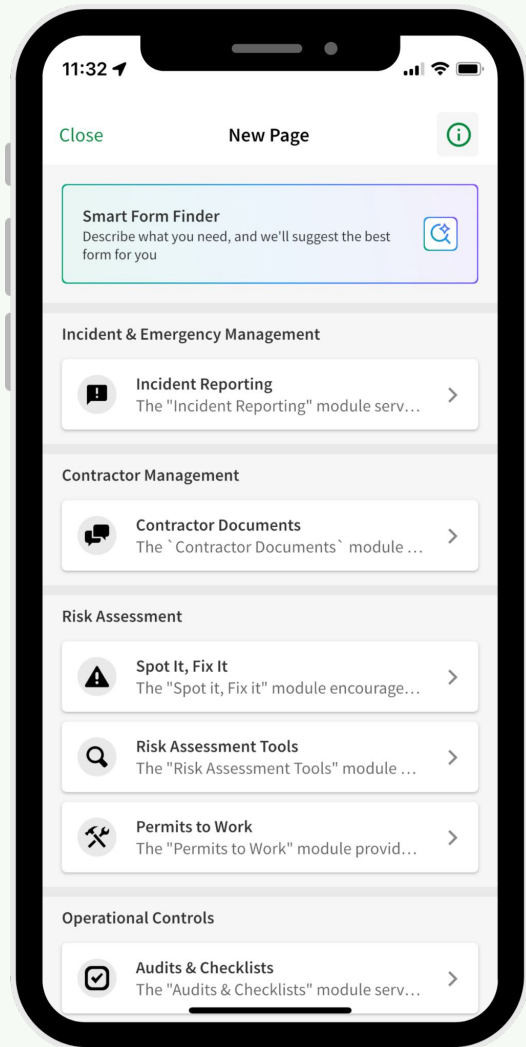
Mobile Register Grouping

Release date: 29 September

Example use cases:

Field workers switching between mobile and web benefit from consistent ordering, reducing the need to re-learn or re-map registers.

People creating new forms can choose to display the register description, helping teams find the right template quickly and confidently across different devices.



Mobile Calendar

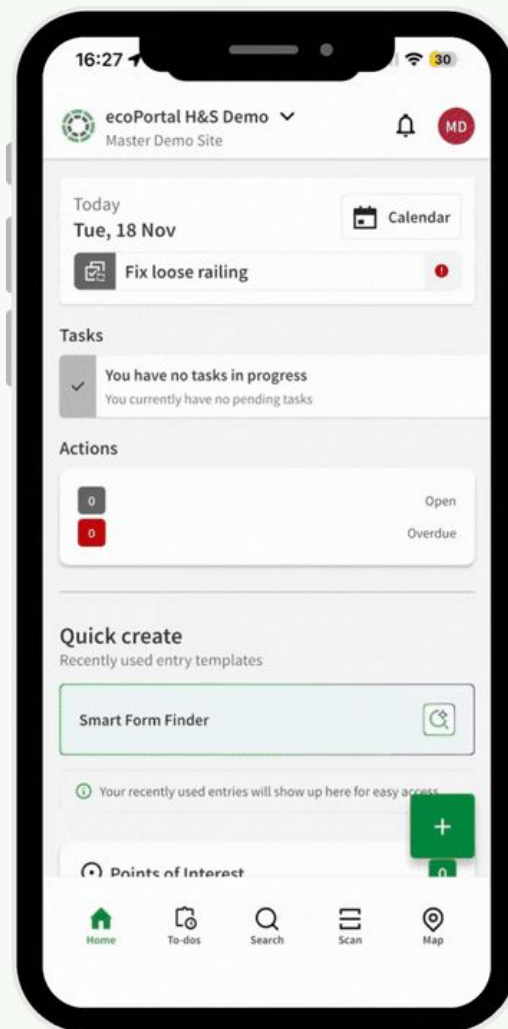
Release date: 30 October

What it does:

Tasks and actions now come together in one mobile calendar view. You can see everything due soon, overdue, or upcoming all in a single screen.

Why it matters:

It helps teams plan their days better, stay organised, and maintain visibility on what really matters.



Mobile Calendar

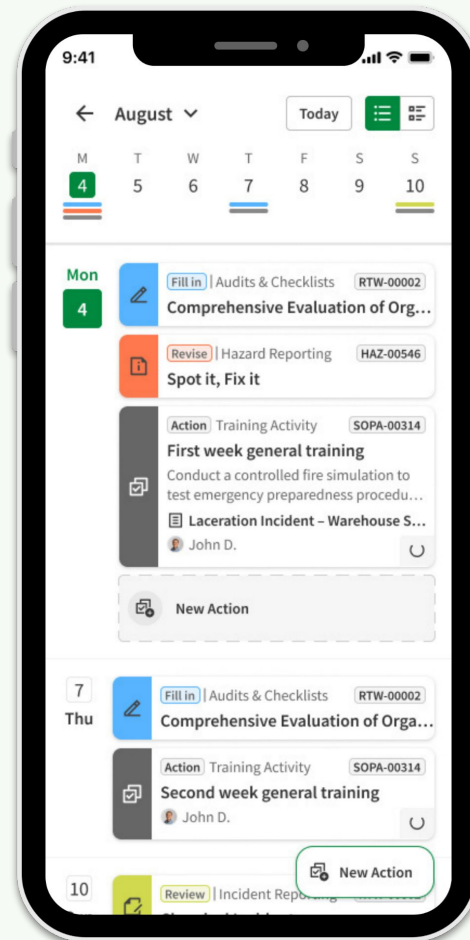
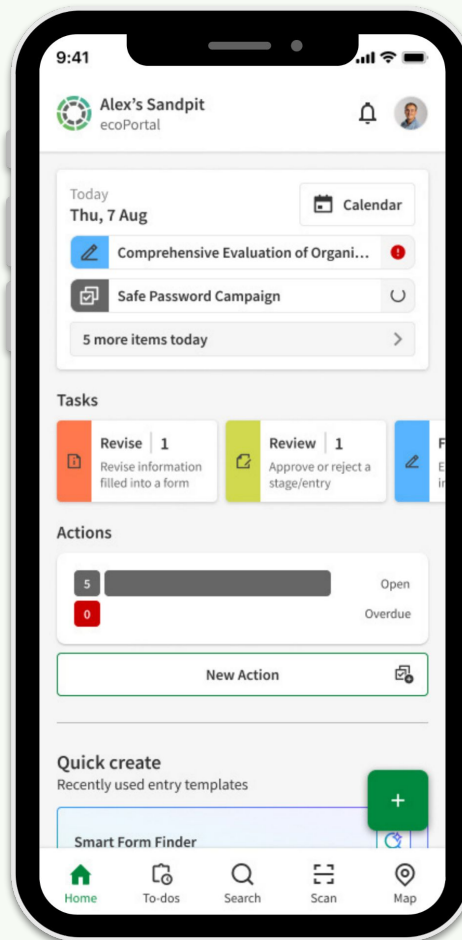
Release date: 30 October

Example use cases:

Planning daily priorities during morning meetings.

Reviewing overdue actions while on-site.

Tracking what's coming up this week at a glance.



Mobile App Reminder

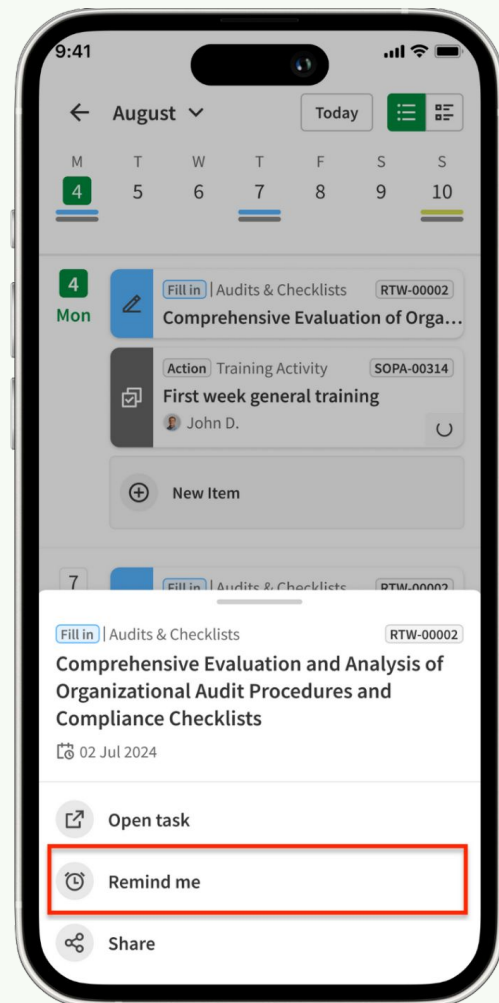
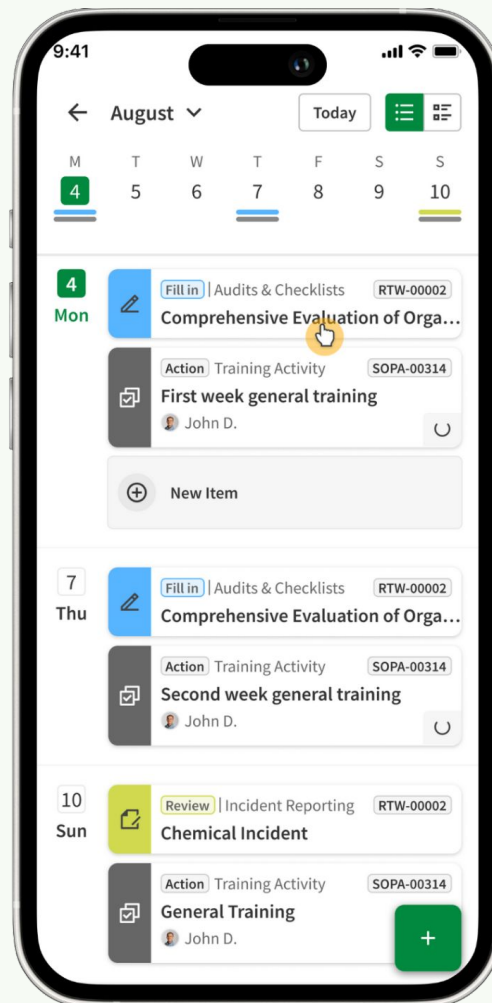
Release date: Coming Soon

What it does

Now, when you're busy or on-the-go, you can set reminders to schedule a push notification for a custom note, or any to-do, page, or comment - even if the app is closed or you are offline. Tapping the notification takes you directly to the relevant item in the app.

Example use cases

Action follow-up: a team lead sets a reminder to follow up next week on an action assigned to one of their direct reports. The reminder triggers even if they resolve the action, showing the update status.



02



*Everyone Gets It by Default



*When opted in to AI



Smart Editor



You can now summarise, refine, and translate text directly in ecoPortal.

Smart Editor

Release date: Coming soon

What it does:

You can now summarise, refine, and translate text directly in ecoPortal. Whether you are closing an action, leaving a comment, or entering information on an incident report

Why it matters:

The new Smart Editor helps everyone communicate clearly and confidently. It allows you to rephrase, translate, and polish text directly in ecoPortal, improving clarity and inclusiveness across your teams.

The screenshot displays the 'INC-21503 Corporate office fire accident' report in the ecoPortal system. The interface includes a progress bar with four steps: Report, Investigation (active), Conclusions, and Signature. Below this, there are tabs for 'Special case', 'Auckland', 'Wellington', and 'Main Quarters'. The 'General data' section contains fields for 'Incident reporter', 'Name of reporter' (Frank Smith), and 'Age' (55). The 'Describe the incident' section features a rich text editor with a toolbar (Normal, Bold, Italic, Underline, Link, Image, Video) and a text area containing a paragraph about local communities and regulatory repercussions. A context menu is open over the text area, offering options: Summarise, Rephrase (highlighted with a hand icon), Make professional, Fix mistakes, and Translate. Below the text area, the 'Damage and injury assessment' section includes a 'Type of damage' dropdown (Set all) and checkboxes for Structural Damage, Water Damage, Fire Damage, and Mild and Mildew Damage. At the bottom, there is a question 'Did the injured received medical attention?' with radio buttons for Yes, No, and Unknown.

Smart Editor

Release date: Coming soon

Example use cases:

Facilitating clear communication in incident reporting

Marco, a machine operator, witnesses a complex near-miss and writes up what happened. He worries that his grammar might not capture how serious the event was. Now, he simply highlights his text and uses *Fix mistakes*, then highlights the text again and selects *Make professional*.

Bridging language gaps across teams

Paul, a maintenance engineer whose first language isn't English, needs to record a fault. He writes it in his native language, then highlights the text and selects *Translate* to convert it into English.

The screenshot shows a web application interface for an incident report. At the top, there's a green header bar with a menu icon, the text 'INC-21503 Corporate office fire accident', and a 'Viewing' dropdown. Below the header, a progress bar shows four steps: 'Report' (completed), 'Investigation' (active), 'Conclusions', and 'Signature'. Under the 'Investigation' step, there are buttons for 'Special case', 'Auckland', 'Wellington', and 'Main Quarters'. The main content area is titled 'General data' and 'Incident reporter'. It contains a form with 'Name of reporter' (Frank Smith) and 'Age' (55). Below this is a text area for 'Describe the incident' with a rich text editor toolbar. A context menu is open over the text area, showing options: 'Summarise', 'Rephrase' (highlighted with a mouse cursor), 'Make professional', 'Fix mistakes', and 'Translate'. The text area contains several paragraphs of text, including '3. Regulatory and Legal Repercussions: Significant Enforcement Action Against One or More Company Assets: Regulatory bodies are highly likely to take substantial enforcement action. This could include fines, sanctions, operating restrictions, or even the temporary or permanent closure of specific company assets. These actions would not only incur financial penalties, but also disrupt operations and further tarnish the company's reputation.' Below the text area is a section titled 'Damage and injury assessment' with a 'Type of damage' dropdown and a 'Select all' link. There are four checkboxes: 'Structural Damage' (checked), 'Water Damage' (checked), 'Fire Damage' (unchecked), and 'Mild and Mildew Damage' (unchecked). At the bottom, there's a question 'Did the injured received medical attention?' with three radio buttons: 'Yes' (selected), 'No', and 'Unknown'.



→ Email notifications get smarter ←

The refreshed Email Notifications make it easier to stay on top of what matters.

Email notifications get smarter

Release date: Coming soon

Refreshed notification design and structure

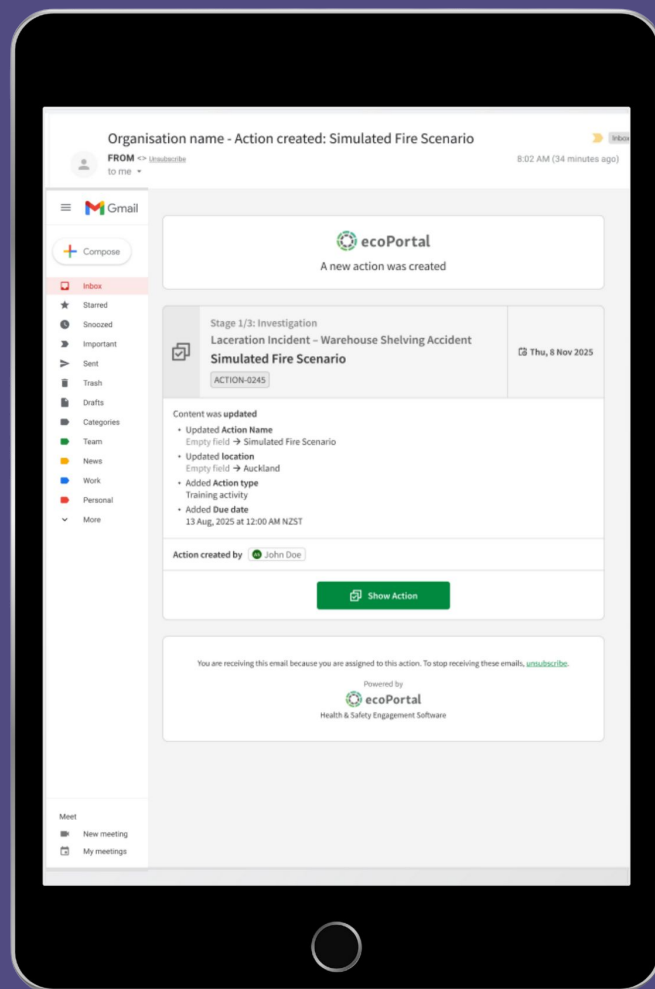
Notifications for **Tasks**, **Actions**, and **Page activity** now feature a cleaner layout helping you instantly see what needs your attention.

AI-powered Smart Summaries in emails

For those with AI Smart Summaries enabled, notifications for fill-in, review, revise, and comment tasks, as well as assigned actions, now include a Smart Summary that gives you an overview of what's happening on that stage of the page without needing to open the platform to see..

Improved page update notifications

Instead of receiving separate emails for every field edit or comment, updates are now conveniently grouped together by page. You'll still receive them according to the timing and priority preferences you've set in your Account Settings, but with far better context.



*This is a design mock-up and may differ slightly from the final product.

Email notifications get smarter

Release date: Coming soon

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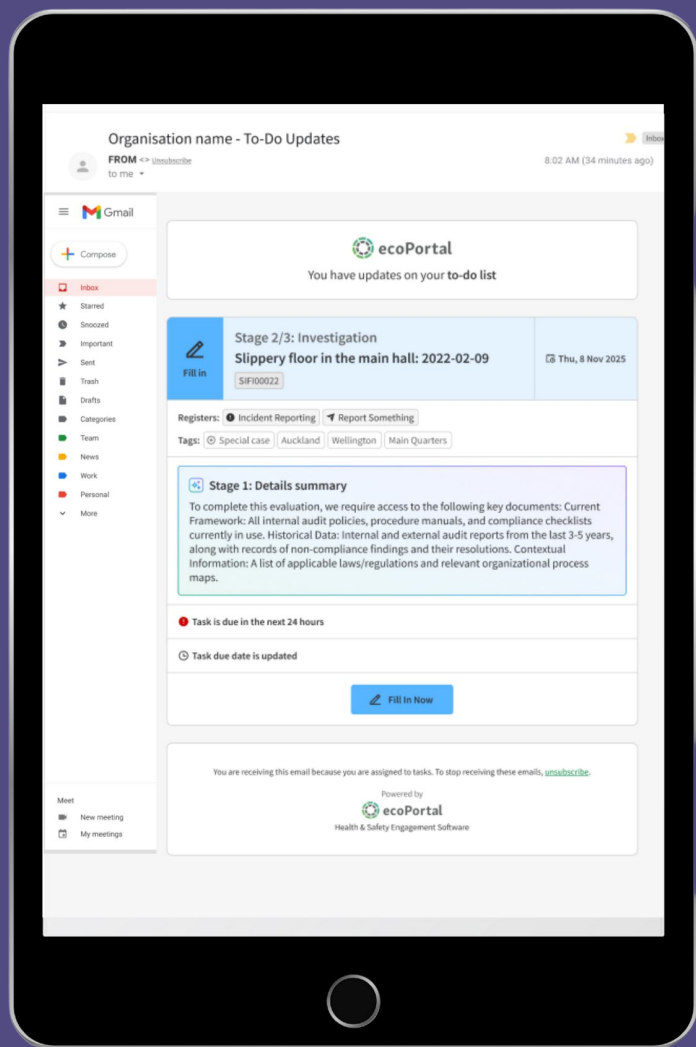
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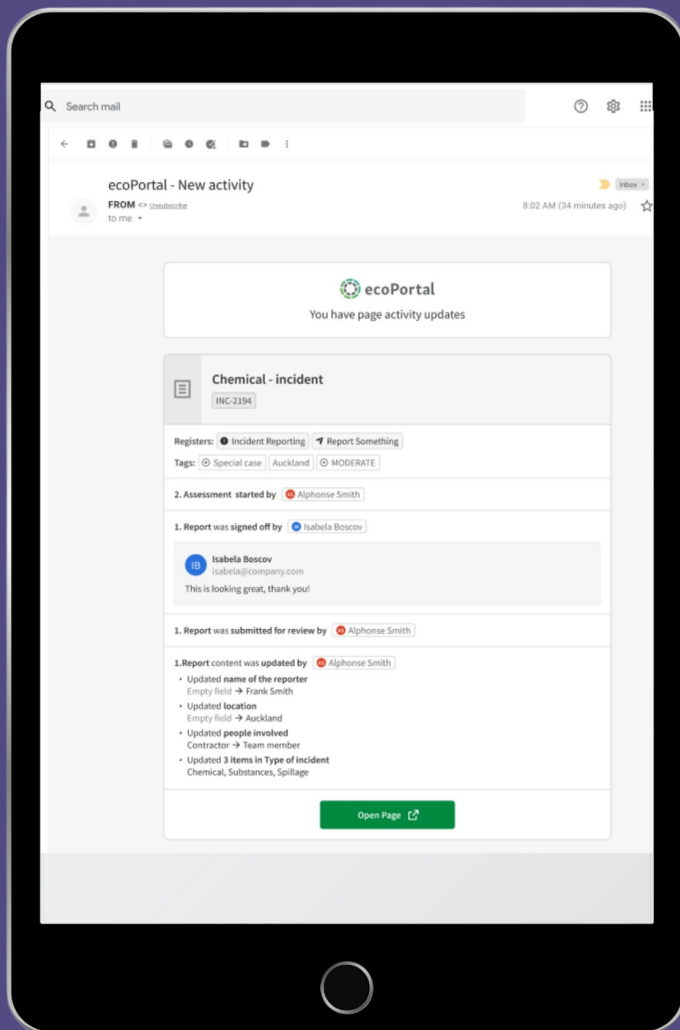
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Visitor Management Module Improvements

A quick round up of recent improvements to our Visitor Management module

Visitor Management improvements

Release date: 29 October

Identification via Phone Number & Remembering Visitor Details

Contractor Organisation Check-in Conditions

Variable Check-in Conditions

Edit visitor type

Visitor identification

Email

Email

Phone number

Visitor fields

Select the fields for your check-in experience

Field title

Pre-fill

Required



Name



Email



Phone number



Company



Visitor Management improvements

Release date: 05 November

Identification via Phone Number & Remembering Visitor Details

Contractor Organisation Check-in Conditions

Variable Check-in Conditions

Check in requirement

Does the visitor or their company need to be listed in the register? ?

☒ Yes

☐ No

Register *

Contractor Company ▼

Conditions * ?

Select field to target for this requirement

contractor organisation ▼

Contracting Company: ▼

AND ▼

Contracting Company:

has any of ▼

Search... ▼

Bob's Electrical Co ×

AND

Overall review status:

is greater than ▼

80

Cancel

Save

Visitor Management improvements

Release date: 05 November

Identification via Phone Number & Remembering Visitor Details

Contractor Organisation Check-in Conditions

Variable Check-in Conditions

Visitor fields
Select the fields for your check-in experience

Field title	Pre-fill	Required
Name	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Email	<input type="checkbox"/>	<input type="checkbox"/>
Custom Field (e.g. Work Oder No.)	<input type="checkbox"/>	<input type="checkbox"/>

Add Field

Delete Visitor Type

Cancel **Save**

Copy variable {{Contractor Custom Field (e.g. Work Oder No.)}} to clipboard

Check in requirement

Visitor type
1 selected | Select...

Contractor x

Does the visitor or their company need to be listed in the register? ?

☐ Yes

☒ No

Register *

Contractor Company

Conditions * ?

Work Order Number contains {{Contractor Custom Field (e.g. Work Oder No.)}}

Add condition... + All condition types Clear All

Cancel Save

05



Requires Configuration

Quick Fire Updates

A quick round up of recent improvements across ecoPortal

Quick Fire Updates



Chart by Reporting Structure Classification

Release date: 16 October

Use classifications instead of individual location tags for automatic chart segmentation



Chart by People

Release date: 14 November

Integrate your people data directly into your dashboard charts to quickly check metrics related to specific user groups or people in your teams



Required Fields for Actions

Release date: 29 September

You can now decide which fields must be completed for each of your action types.

Chart type

Bar



X-axis field type

Select



X-axis field *

Tags



Use tags or classifications ?



Tags



Classifications

Reporting structure *

Locations



Classification *

City



Quick Fire Updates



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Required Fields for Actions

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You can now decide which fields must be completed for each of your action types.

Setup

Title *

Bar chart title

Chart type

Bar

X-axis field type

People

Show people from

Dashboard owner's team

Dashboard owner's team

User group

Specific users

Top results

Quick Fire Updates



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Release date: 16 October

Use classifications instead of individual location tags for automatic chart segmentation"



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Required Fields for Actions

Release date: 29 September

You can now decide which fields must be completed for each of your action types.

Action info

×

Details

Action Name *

Remind staff to wear boots

Location *

Auckland, New Zealand

Edit Location

Action type *

General Action

Description *

Assigned to *

Search people...

Due Date *

DD-MM-YYYY hh:mm aa

NZST

Files *

⬆

 Drag and drop or click here to upload files

TXT, DOC, DOCX, PDF, XLS, XLSX, show more

Cancel

Save

06



Everyone Gets It by Default



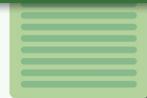
ecoPortal Help Centre Revamp



The revamped *Help Centre* makes it easier and faster for you to find the information you need



ecoPortal Help Centre Revamp



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.



Everyone Gets It by Default

Smart Editor

Email notifications get smarter

Mobile Calendar

Mobile App Reminders

Mobile Search Refresh

Charts By People

Charts Reporting Structure
Classification

Mobile Register Grouping



Requires Configuration

Visitor Management improvements

Required Fields for Actions

Drop In-Training Sessions

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



Scan me!

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

