ecoPortal | WHAT'S new

Set Up for Success: Little Adjustments, Big Wins for How Your Teams Work



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Enablement & Adoption Lead

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:**

01 Faster data entry for the frontline

02 Exec-ready reports for leadership

03 Enhanced management for admins

04 AI Innovations Teaser & Quick-fire updates

Frontline Experience

Reducing Friction on the Ground

	FEATURE	ADOPTION	GETTING STARTED
01	Copy Pages	🔧 Request Configuration	Raise a Ticket
02	Create Calendar Events for Page Dates	🔧 Request Configuration	Raise a Ticket
03	Page Reference Field Filtering	🔧 Request Configuration	Raise a Ticket
04	Online-First Mode on Mobile	❗ Action Required	Raise a Ticket

Copy Pages

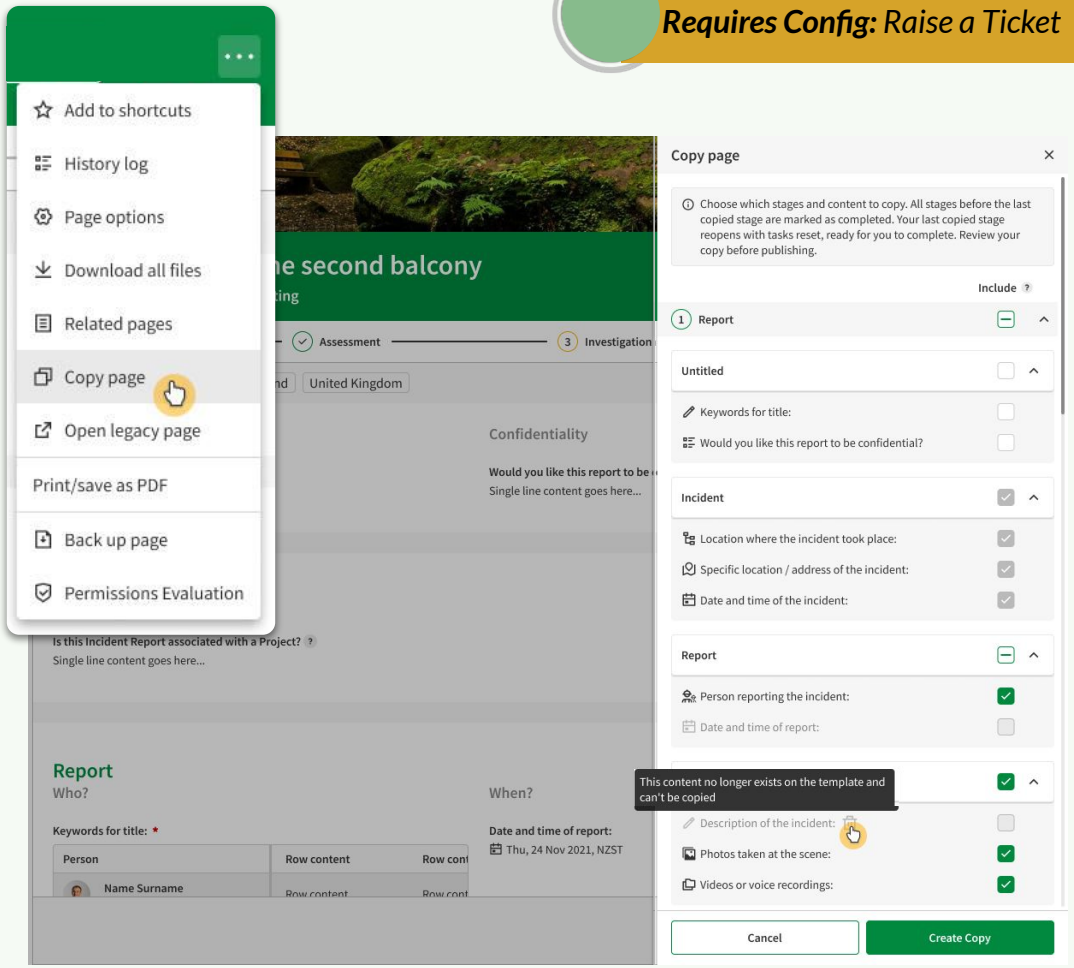
Released: 18 August 2026

What it does:
Admins set what's allowed to be copied at the template level, so the frontline can choose which of the pre-approved stages, sections, or fields they want to bring across into their new draft.

Configuration Type: Request via Jira
Submit a ticket letting us know what data you'd like to make available to be copied from the template.

Why it matters:
Skips the repetitive data entry, saving your team from re-entering the information that needs to be the same.

***Requires Config:** Raise a Ticket*



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Create Calendar Events for Page Dates

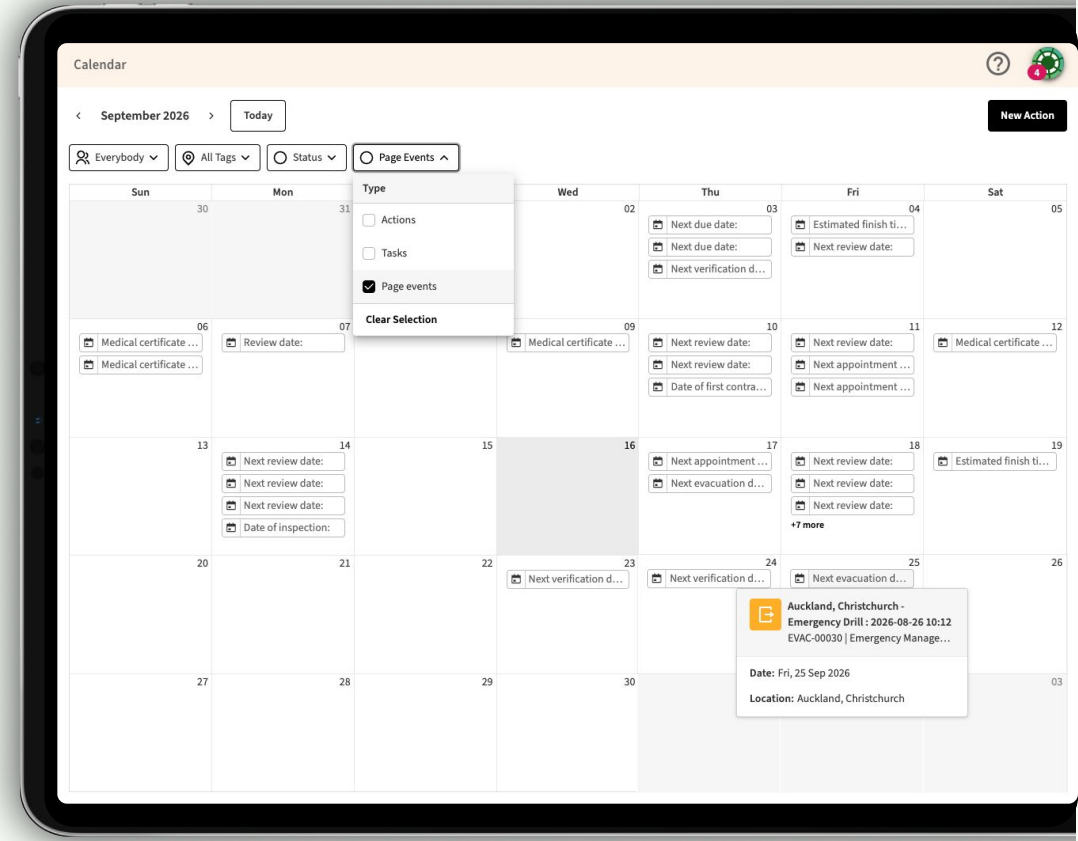
Released: 11 August 2026

What it does:
Key dates captured in page date fields now appear alongside your to-dos in the *Calendar*. Find them using the new *type* filter widget, and check key details with ease.

Configuration Type: Request via Jira
If a specific date is not showing up on the *Calendar*, raise a ticket specifying the template and date field you wish to enable.

Why it matters:
Gives teams full visibility of upcoming deadlines without opening each page one by one.

Requires Config: *Raise a Ticket*



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Page Reference Field Filters

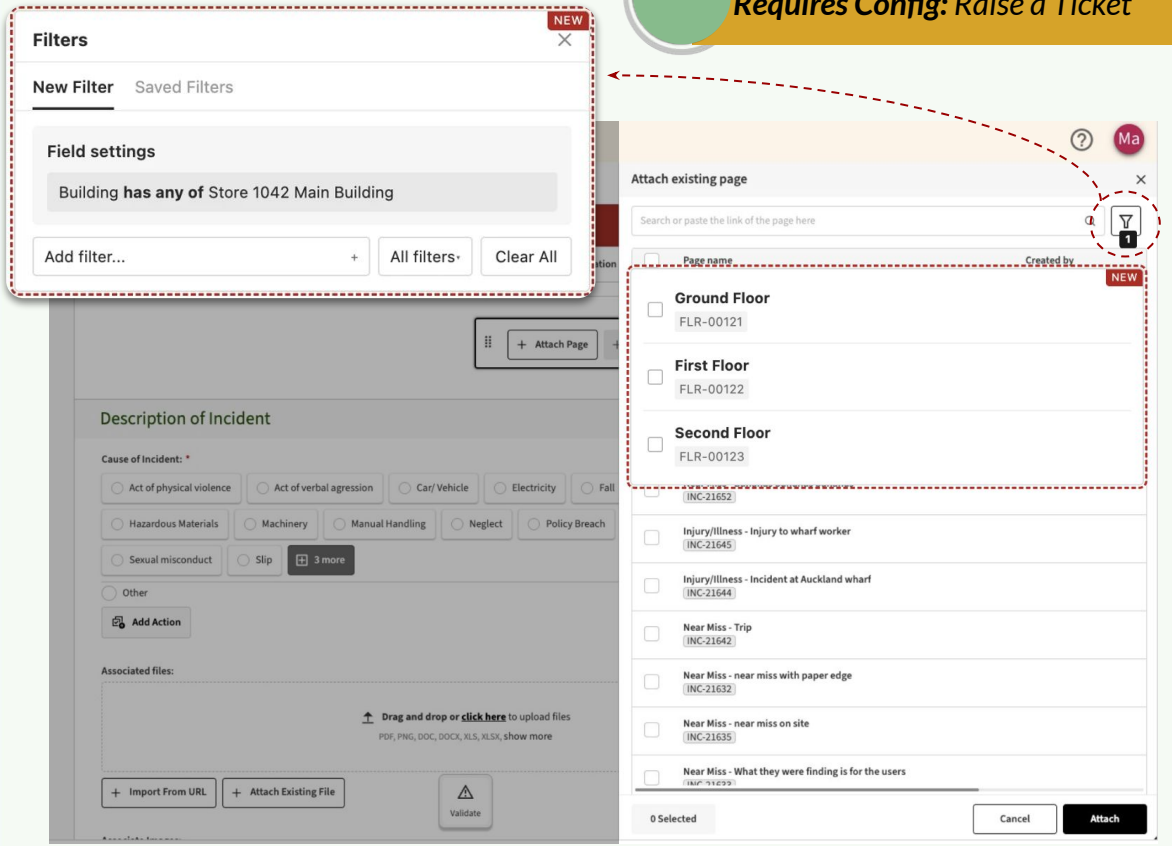
Released: 17 September 2026

What it does:
Add a filter condition to a page reference field, so that when someone attaches a page, they see a narrowed-down list of relevant pages instead of every page in the register.

Configuration Type: Request via Jira
Registers and filters must be configured on the template level. Raise a ticket and we'll set it up for you.

Why it matters:
Eliminates the noise of unrelated pages, guiding people to the relevant records faster.

***Requires Config:** Raise a Ticket*



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Online-First Mode for Mobile

Coming Soon

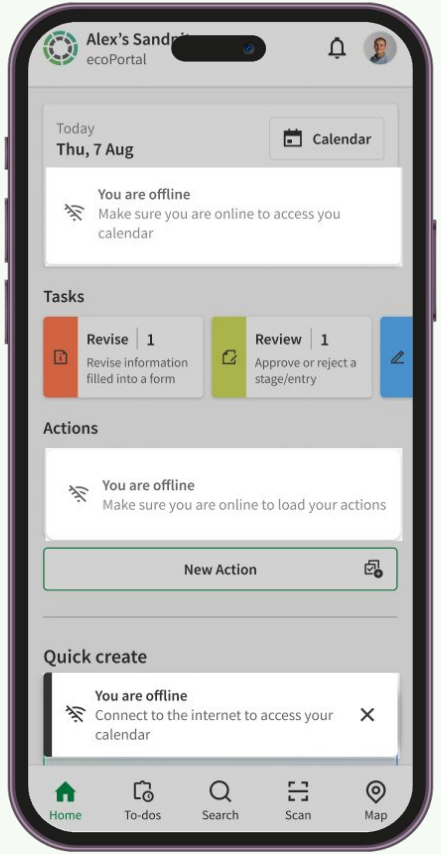
What it does:
Restrict full offline access to only the user groups who need it. Everyone else defaults to an online-first experience with faster loading times and reduced device storage, while retaining essential offline basics.

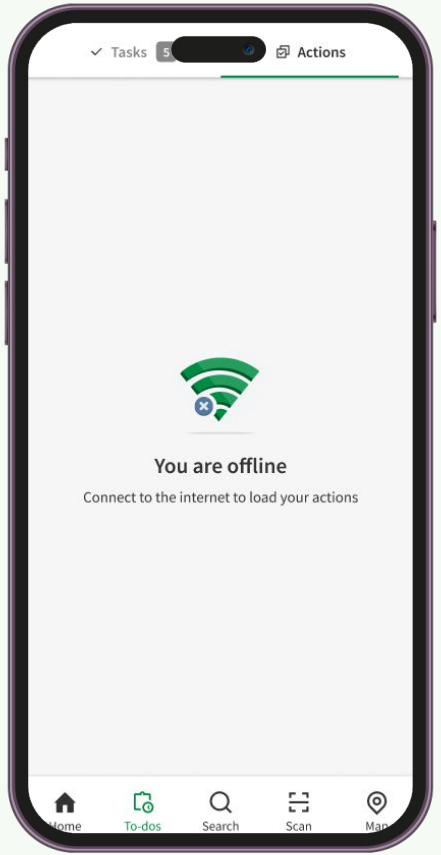
Configuration Type: Action Required
Raise a ticket by **30 September** to let us know which user groups should retain offline access.

Why it matters:
Gives teams the exact mobile capabilities needed for their specific work environment.

Action Required: *Raise a Ticket*

Once rolled out, everyone gets it by default.





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Insights for Leadership

Easily Report on Your H&S Data

	FEATURE	ADOPTION	GETTING STARTED
01	Dashboard Printing & Snapshots	Everyone gets it by default	👍🏽DIY: Configurable Feature
02	Cross-Filtering	Everyone gets it by default	👍🏽DIY: Configurable Feature

Dashboard Printing & Snapshots

Released: 14 September 2026

What it does:
Create ready-to-share reports from your dashboards that you can print (or export to PDF), with tailored layouts, contextual notes, and more. Save point-in-time snapshots directly in the system to easily track progress over time.

Configuration Type: DIY
Rearrange and resize charts directly using drag-and-drop. Additional setup options available.

Why it matters:
Gives you a flexible, professional way to share dashboard reports with stakeholders and keep track of your historical data.

Configurable Feature



📖 **Check it out:** Reporting Dashboards guide in the Master Demo site

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Cross-Filtering (To Do, VM, registers)

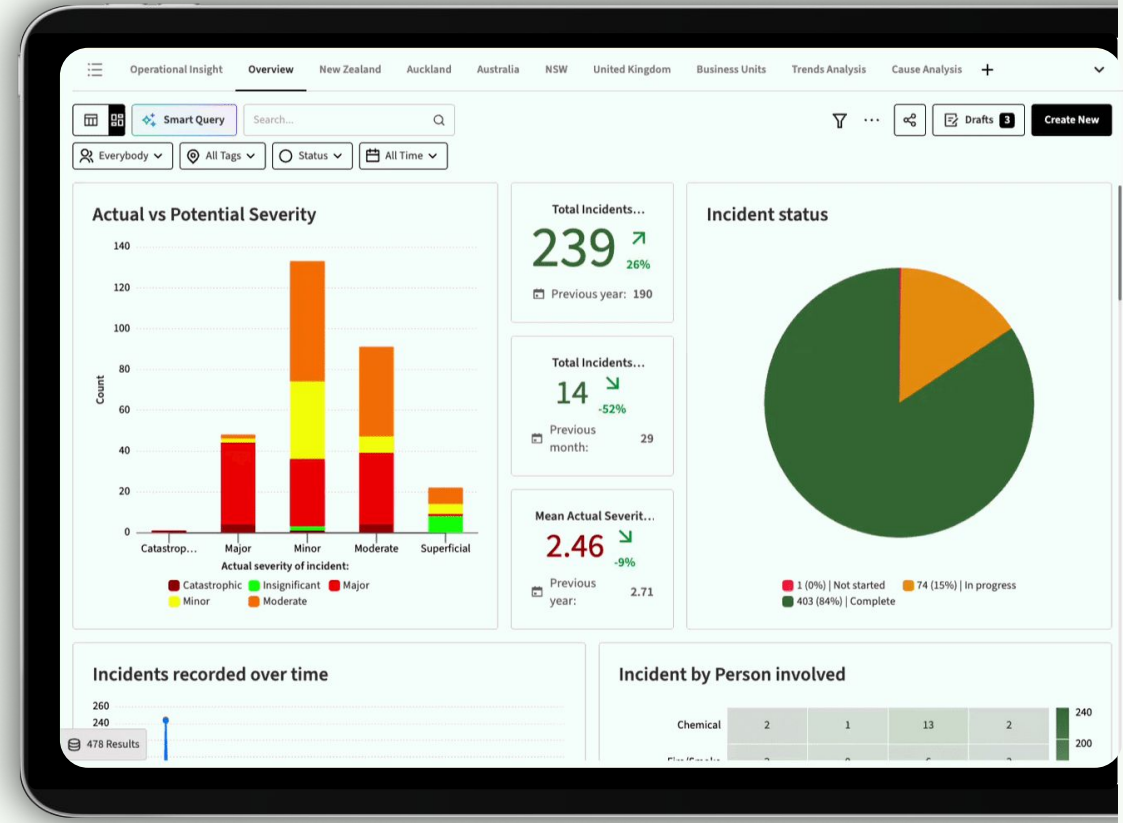
Released: 16 July 2026

What it does:
Clicking any chart segment filters the entire dashboard to match that selection by default, and chart legends also act as filters. Explore the underlying pages using the view switcher.

Configuration Type: DIY
While cross-filtering is now the default, you can choose to change this to the traditional drill-through behaviour on dashboards you can edit.

Why it matters:
Gives you an exploration-first flow, where you can layer multiple selections together to test ideas on the fly, without having to build manual queries.

Configurable Feature



Enhanced Day-to-Day Admin

Platform-Wide Refresh

	FEATURE	ADOPTION	GETTING STARTED
01	File Manager Refresh	Everyone gets it by default	At least *File Manager > View* Ability
02	People Manager Tables Refresh	Everyone gets it by default	At least *Person Core > View* Ability

File Manager Refresh

Released: 06 August 2026

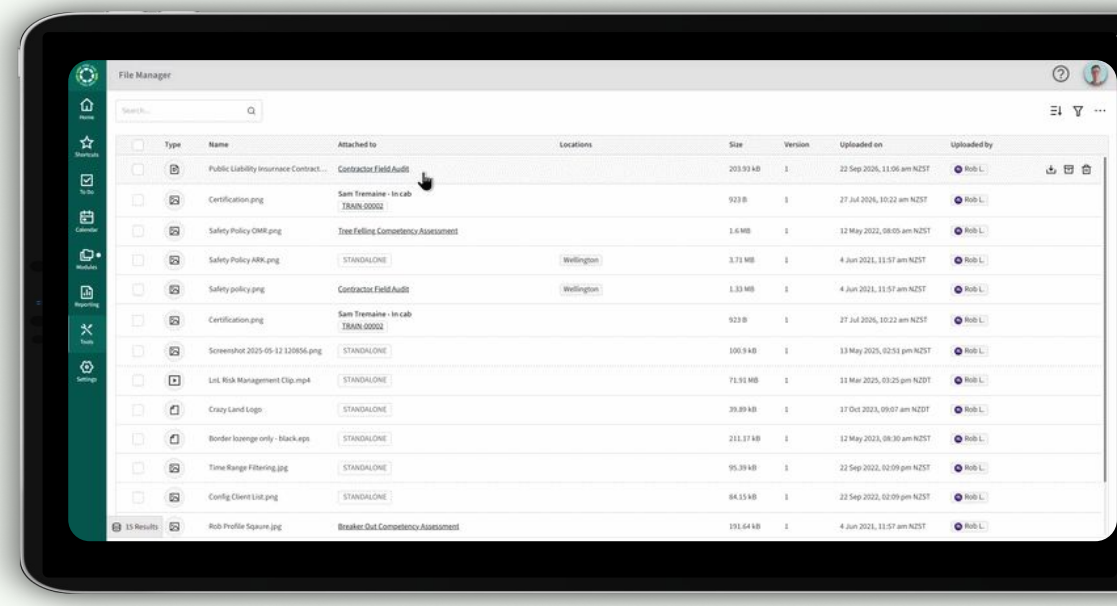
Everyone gets it by default

What it does:

- Manage your documentation more efficiently, with a refreshed *File Manager* design featuring file previews and improved ways to organise and export.
- Separated from individual file permissions, access to the *File Manager* tool can now be controlled with more precision.

Why it matters:

Gives you a more intuitive and efficient way to manage your ecoPortal files.



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People Manager Tables Refresh

Coming Soon

Everyone gets it by default

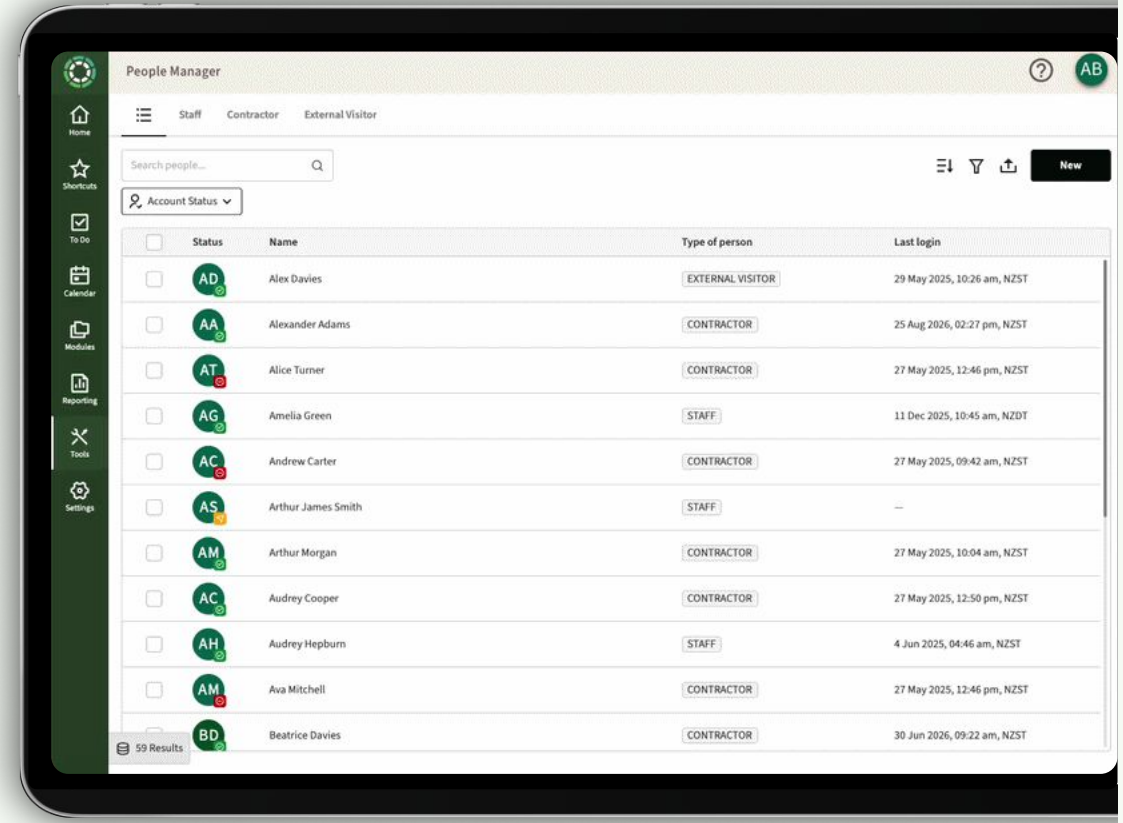
What it does:

The tables in the People Manager have been refreshed with our modern look and feel. Oversee, organise, and manage your user accounts with enhanced filtering, export presets, streamlined bulk actions, and easy access to person details.

- Resend invites and archive user accounts directly from the bottom bulk bar.
- Next: *Person Details* edit screen and invites process.

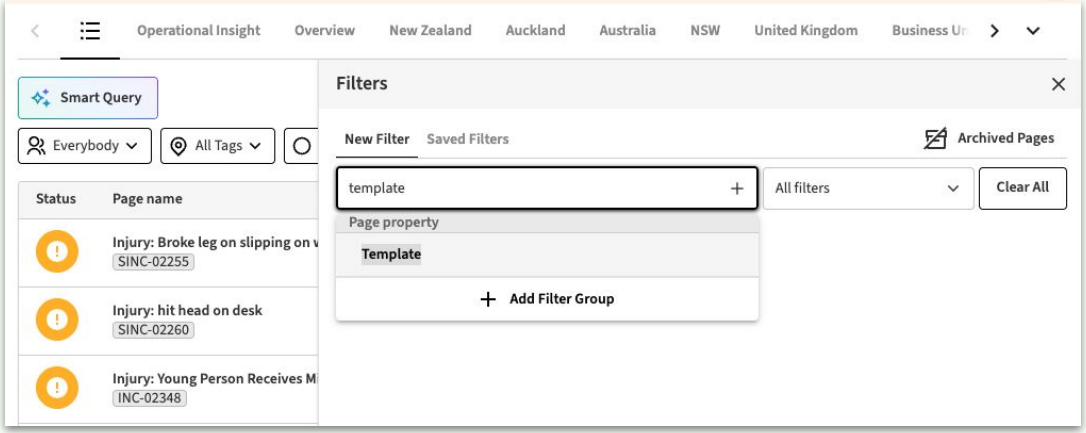
Why it matters:

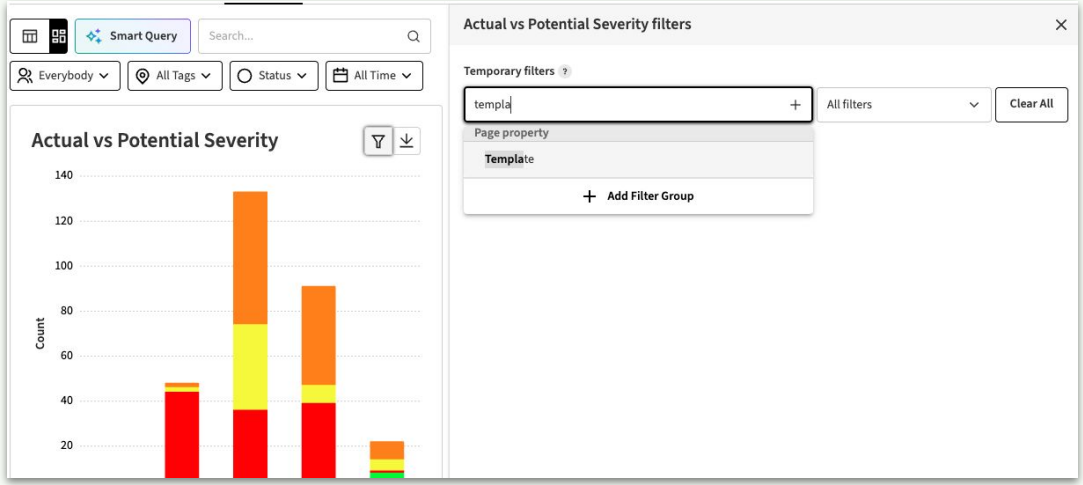
Part of the platform-wide refresh, bringing a faster, more intuitive, and consistent experience across all of ecoPortal.



Quick-fire Updates

Smaller, yet impactful features to make your day-to-day work smoother.



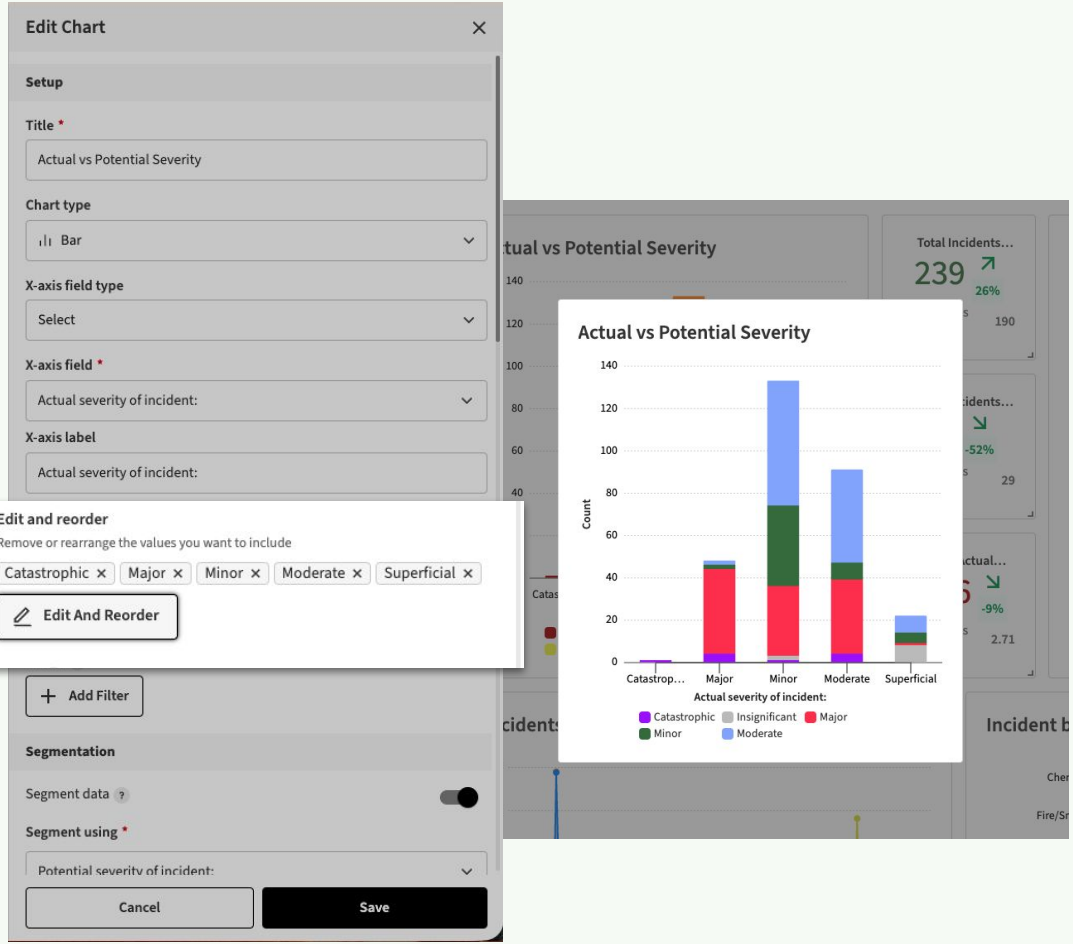


Filter by Template

Filter your register tables and charts by template name, giving you a reliable, easier way to track and report on all pages built from a given template ((including versions that have since been updated, unpublished, or retired).

- Control Select Field Display on Charts
- 🔧 Reporting Structure: Search
- 🔧 Reporting Structure: Linked Fields
- Persist Edit Mode
- 📱 More Push Notifications
- 📱 Page Overview Bar on Mobile

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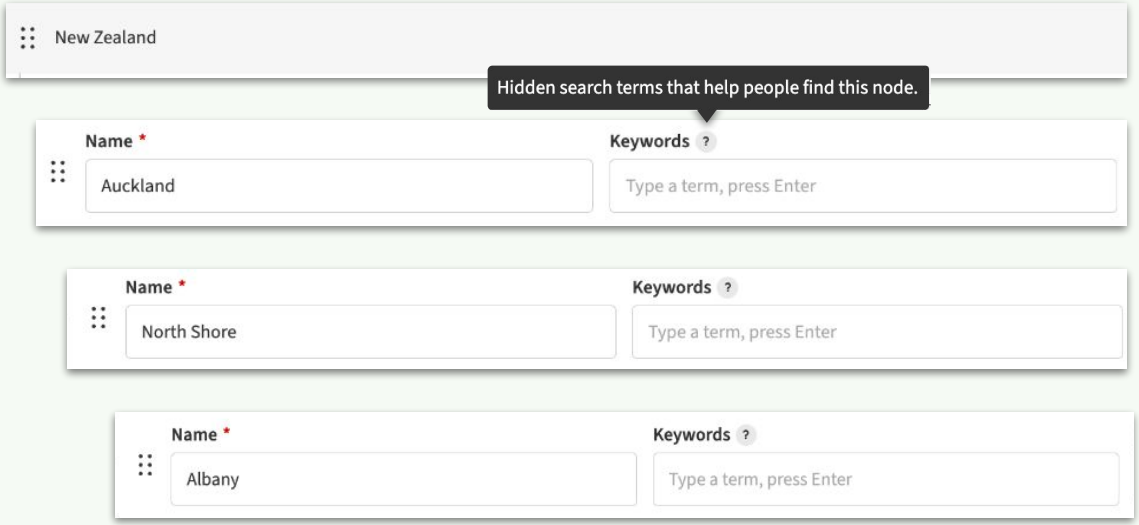
- Filter by Template

Control Select Field Display on Charts

When building charts that target dropdown or select fields, you can choose which exact options are displayed, and drag and drop them to create a clean view.

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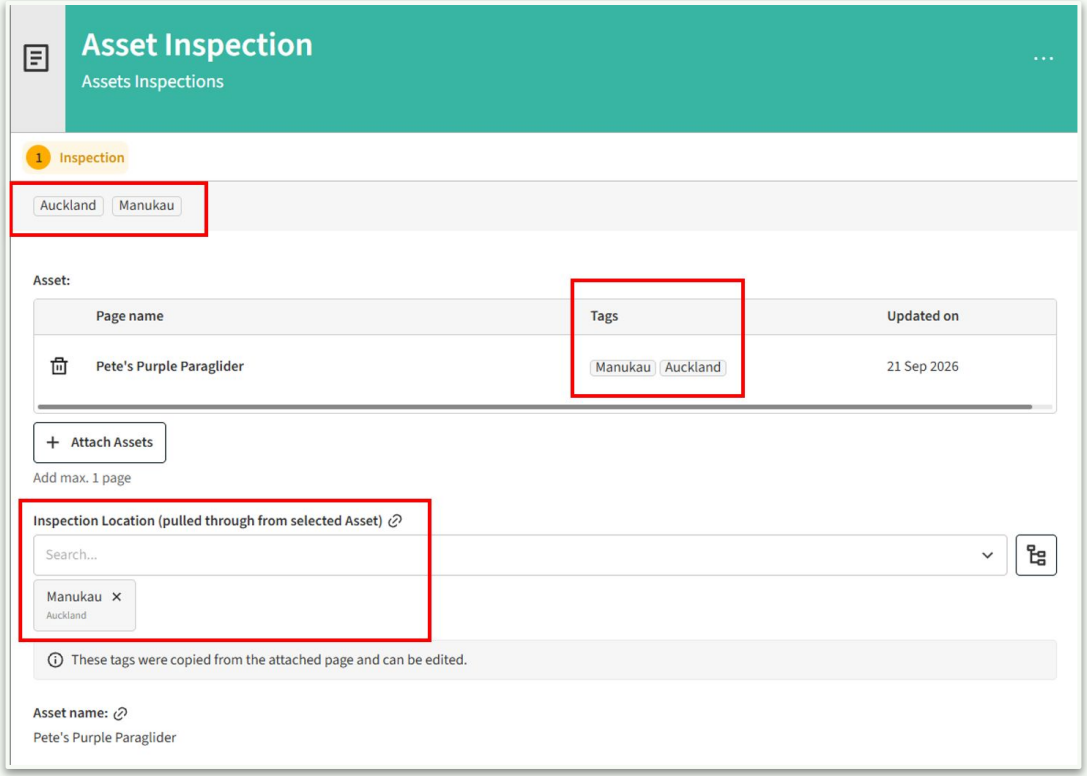


- Filter by Template
- Control Select Field Display on Charts

🔧 Reporting Structure: Search

Finding RS tags can be made much easier for your teams now. Add up to 5 keywords per RS node, so that the right tag surfaces immediately even if it's not the exact word match. *(Requires configuration)*

- 🔧 Reporting Structure: Linked Fields
- Persist Edit Mode
- 📱 More Push Notifications
- 📱 Page Overview Bar on Mobile



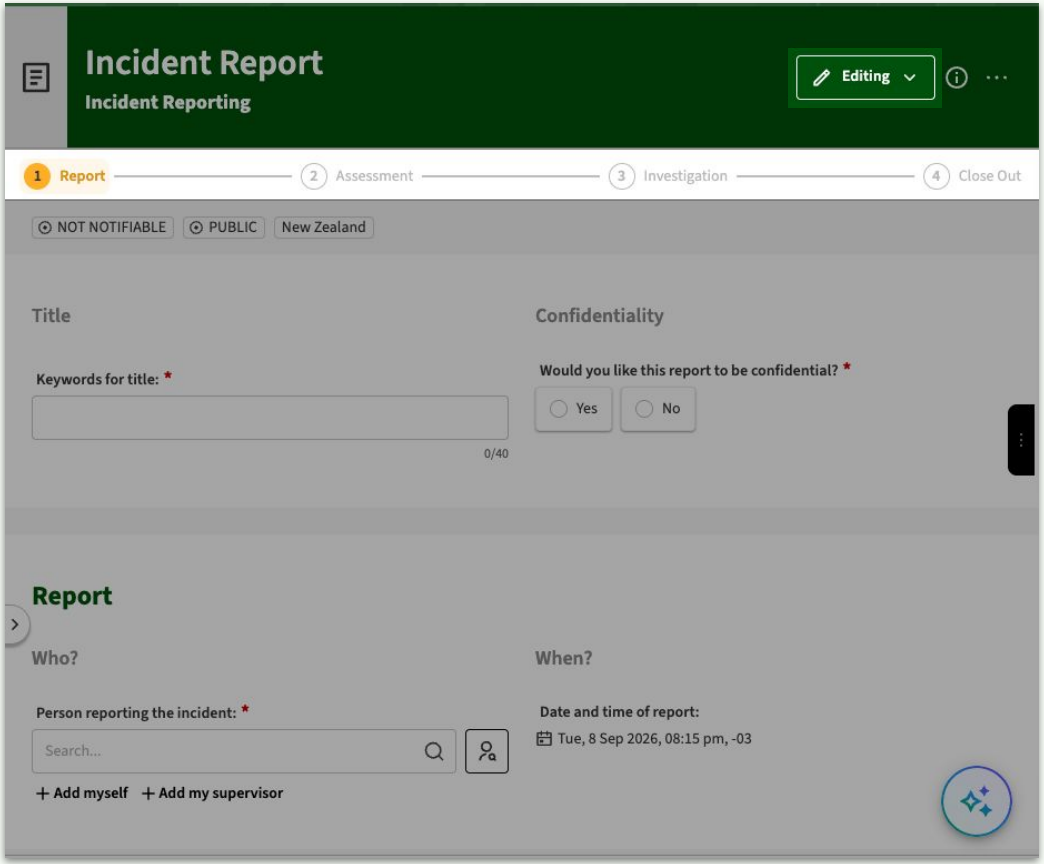
- Filter by Template
- Control Select Field Display on Charts
- 🔧 Reporting Structure: Search

🔧 Reporting Structure: Linked Fields

Reporting structure fields can now be set up as "linked fields", which means tags can automatically be carried across to connected pages (e.g. incident 🔗 injury). *(Requires configuration)*

- Persist Edit Mode
- 📱 More Push Notifications
- 📱 Page Overview Bar on Mobile

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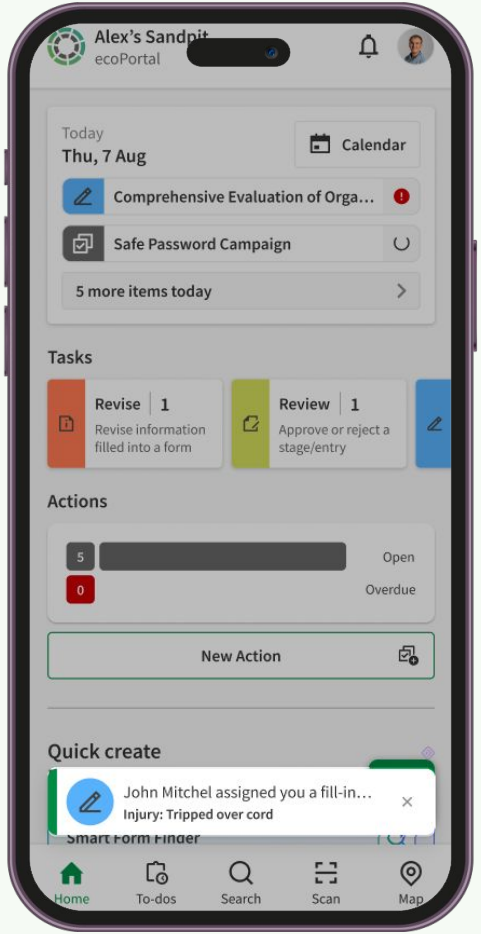
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- 🔧 Reporting Structure: Linked Fields

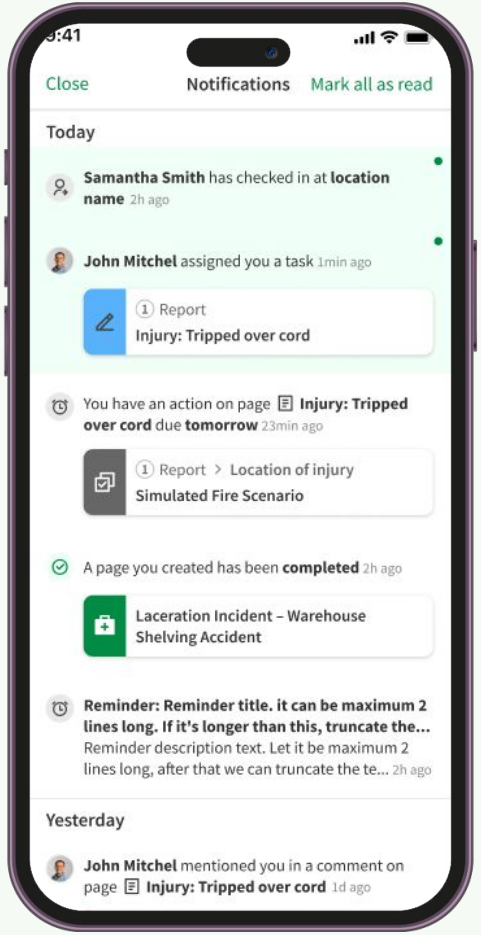
Persist Edit Mode

Edit mode now stays on when moving between stages on multistage pages like incident reports, so you no longer need to click *Edit* every time.

- 📱 More Push Notifications
- 📱 Page Overview Bar on Mobile

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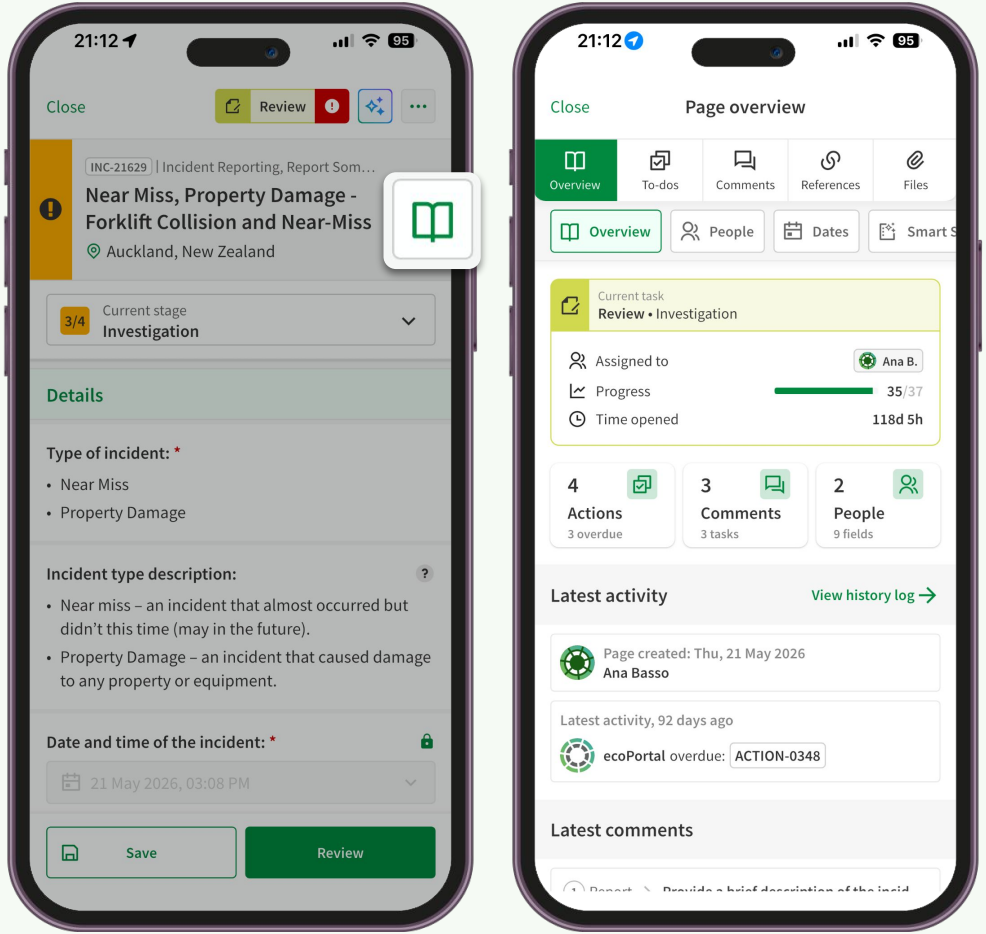




- Filter by Template
- Control Select Field Display on Charts
- 🔧 Reporting Structure: Search
- 🔧 Reporting Structure: Linked Fields
- Persist Edit Mode
- 📱 **More Push Notifications**

  Coming soon. Mobile notifications now cover a wider range of updates, like action assignments, mentions, escalations, and visitor arrivals. They're all neatly organised in an upgraded notification centre so field teams never miss an important update. (*Update your app to the latest version).*
- 📱 Page Overview Bar on Mobile

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- Filter by Template
- Control Select Field Display on Charts
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- Persist Edit Mode
- 📱 More Push Notifications

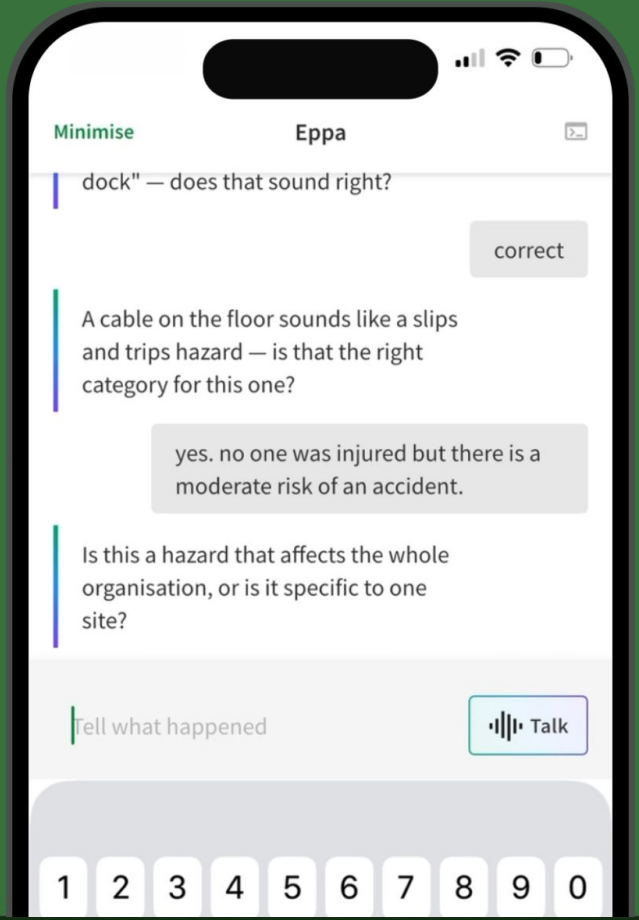
📱 Page Overview Bar

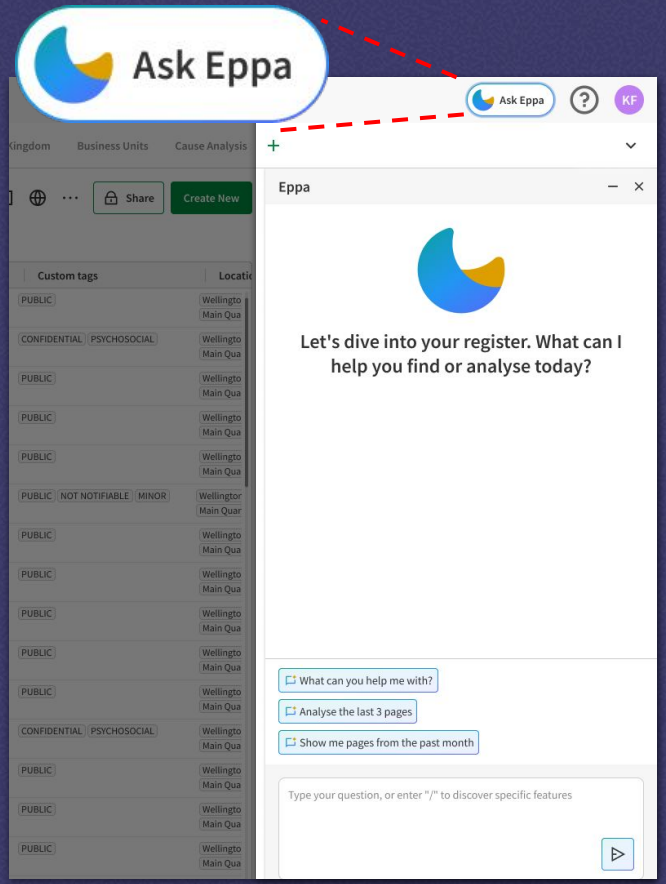
Teams using the mobile app now enjoy an extended page overview bar, similar to the one in the web app, to quickly review key details, and swipe through Overview, To-dos, Comments, Page References, and Files. (*Update your app to the latest version).*

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Teaser: AI Innovations

A first look at where our AI capabilities are heading on web and mobile.


Minimise
Eppa
dock" — does that sound right?
correct
A cable on the floor sounds like a slips and trips hazard — is that the right category for this one?
yes. no one was injured but there is a moderate risk of an accident.
Is this a hazard that affects the whole organisation, or is it specific to one site?
Tell what happened
Talk
1 2 3 4 5 6 7 8 9 0



Introducing Eppa:
Your ecoPortal Personal Assistant

Coming Soon

If you need AI assistance, you currently need to choose between three separate tools depending on what you're trying to do: analyse a page, query register data, or look up platform guidance. ***Eppa* brings all three of those capabilities together into one single, friendly conversation.**

You can ***Ask Eppa*** questions in plain, everyday language to help you:

- **Prepare for a meeting?** Open an incident page and ask *Eppa* to summarise the event and all actions taken so far.
- **Analyse trends?** Ask *Eppa* how many incidents were reported across your registers over the past week.
- **Get quick how-to help?** Ask how to perform a task (like creating a dashboard) and *Eppa* will provide step-by-step guidance drawn straight from our Help Centre.

Upcoming events

The Elevate Series: **Advanced**

Perfect for **system administrators** and **data analysts.**

Register Now for our next ***The Elevate Series*** session!



Want to learn more?

Reach out to me or contact your Customer Success Manager



George Blackburn
Senior Customer Success Manager



Lucia Fusco
Senior Customer Success Manager



Sam Tremaine
Senior Customer Success Manager



George Day
Customer Success Manager



Shayne Morris
Head of Customer Success



Mary Kavanagh
Senior Customer Success Manager

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Questions?

Enter them into the Q&A tab



Rob Leyland
Enablement & Adoption Lead

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Thank you!



Rob Leyland
Enablement & Adoption Lead